

# Methodology Report

## 2019 Follow-up to the College Application Process Survey (2019 CAPS)

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## Section 1 – Study Background and Overview

### 1.1 – Study Background

With support from the Carnegie Corporation of New York, NORC at the University of Chicago (NORC) conducted a contemporary follow-up survey to provide further evidence about the effects of the Bottom Line advising and mentoring program. This study was conducted in partnership with Bottom Line, and co-Principal Investigators Ben Castleman (University of Virginia) and Andrew Barr (Texas A&M University).

For more than 20 years Bottom Line has been helping students navigate college access and college success pathways. A brief summary of the Bottom Line college advising programs are as follows.<sup>1</sup>

Bottom Line provides several thousand low income and first generation students with highly personalized and comprehensive guidance regarding college applications, financial aid, and college choice, and once in college, major and course selection, making use of campus-based resources, and engaging in campus social activities. Students whose families make less than 200 percent of the federal poverty line, would be first-generation college students, and who have at least a 2.5 high school GPA may apply to Bottom Line during the second semester of their junior year in high school. Those accepted will work with an advisor during the remainder of their junior year and their senior year as part of the organization's **Access Program**, which assists the participants with college choice and affordability. Roughly 50 percent of those in the Access Program will then enroll in a regional college that hosts Bottom Line advisors who provide on-campus support for participants in the **Success Program**. Success participants have access to Bottom Line advisors for up to six years and meet with them 3 to 4 times each semester. The **Success Program** is structured around the organization's DEAL model: **D**egree, **E**mployability, **A**id, and **L**ife. The objectives of DEAL are to help students earn a degree by assisting them with tasks that will lead to a degree, including choosing an appropriate major, staying on track with coursework, and taking advantage of the academic resources of the institution. Next is employability, which includes securing internships, writing a cover letter and resume, and help with networking. Aid centers on financial aid, but does not stop with completion of the Free Application for Federal Student Aid (FAFSA). Aid assistance continues through the students' college years to include financial education. Finally, the Life stage helps the participants stay positive throughout the process by staying connected to them and helping them form other connections while on campus.

The purpose of this contemporary study was to better understand the Bottom Line program effect on improving general life outcomes for this population beyond academic achievement. The study includes a follow-up survey conducted in 2019 of the 2015 high school graduation cohort who were originally included in the multi-cohort, randomized controlled trial (RCT)<sup>2</sup> of the Bottom Line college advising program. In total, 1,429 students were assigned to either the treatment or control groups in 2015. The treatment group had full access to Bottom Line support services while the control group did not.

At the time of the follow-up survey, the 2015 high school cohort was 22 years old on average. Those pursuing bachelor degrees were in their senior year of college, but all were at the critical juncture of early adulthood as they embark on careers, further education, start families, and pursue their life course.

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<sup>1</sup> Additional information regarding Bottom Line may be found on their website [www.bottomline.org](http://www.bottomline.org).

<sup>2</sup> Barr, A. and Castleman B. (October 2017). *The Bottom Line on College Counseling*. Retrieved: [http://people.tamu.edu/~abarr/BL\\_shell\\_10\\_17\\_2017.pdf](http://people.tamu.edu/~abarr/BL_shell_10_17_2017.pdf)

The 2019 Follow-Up to the College Application Process Survey (2019 CAPS) assesses health, psychosocial well-being, career goals, career preparation, financial literacy, attitudes towards educational attainment, and civic engagement of youth who did and did not receive Bottom Line program services. These measures intentionally go beyond traditionally-studied educational outcomes. General life and social measures are critical for both Bottom Line and those that invest in the program to fully understand the impact the program has on improving the overall well-being and life outcomes of youth from low-income backgrounds as they become adults in American society.

## 1.2 – Study Overview

The 2019 CAPS questionnaire was developed from October to December 2018, and subsequently programmed into an online survey instrument in January 2019. A pretest occurred in February 2019 and the main study began the first week of April 2019. Both the pretest and main study data collection were implemented via an online survey. The main study data collection lasted 3.5 months and was concluded in mid-July 2019 after achieving a 67.5% unweighted response rate. Data delivery occurred August 15, 2019.

This survey was conducted with members of the original high school class of 2015 Bottom Line RCT evaluation sample (n=1,429), regardless of whether sample members completed the baseline survey in 2015. The original high school students had applied to the Bottom Line program at the following program sites:<sup>3</sup>

- Dorchester, MA
- Jamaica Plain, MA
- New York City, NY
- Worcester, MA

Bottom Line provided NORC with contacting information for both a convenience pretest sample and the main study sample along with sample member demographics.

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<sup>3</sup> The Chicago site was not included as it was launched in 2014 and thus not established enough at the time of the RCT.

## Section 2 – Instrument Development, Prefield Preparation and Data Collection

### 2.1 – Instrument Development, Prefield Preparation, and Data Collection Schedule Overview

2019 CAPS data collection included a prefield preparatory period, a pretest conducted on a small, convenience sample of 2016 high school graduates enrolled in the Bottom Line program, and a main study field period. The following schedule was followed:

- Instrument Development – October 2018 to February 2019
  - Questionnaire development, October to December 2018
  - Survey programming and iterative testing, January to February 2019
  - Pretest data collection, February 2019
  - Survey programming updates based on pretest findings, March 2019
- Prefield Preparation – December 2018 to March 2019
  - Prefield sample file preparation, December 2018
  - Case management system development, February 2019
  - Prefield locating of sample members, March 2019
- Main Data Collection and Locating – April to mid-July 2019

The original study schedule planned for a mid-June end date. However, to reach the study's response rate goals, the data collection field period was extended by one month to mid-July.

### 2.2 – Instrument Development

#### 2.2.1 – Questionnaire Development and Survey Programming

The 2019 CAPS survey included eight main content sections (see Exhibit 1). Questionnaire development for the online survey started in October 2018. Preliminary lists of questions to include in the survey were developed by NORC project staff based on key outcome areas identified by research partners at the University of Virginia and Texas A&M. When developing non-standard questions, project staff consulted existing surveys that provided pertinent validated scales and the opportunity for comparative analysis after data collection. Through the end of 2018, iterative drafts of the survey were developed and reviewed by project staff to ensure the most important topics were robustly covered. Within the main survey body, questions were organized into sections corresponding to the outcome areas of interest: educational aspirations and attainment, career planning, and employment (Q1-Q11); financial health, health insurance, democratic participation, and views on higher education (Q12-Q26); mental and physical health and substance use (Q27-Q38); and other items related to finances and education (Q39-Q47).

NORC obtained permissions from copyright holders for any copyrighted questions that were used in or adapted for the final survey. Items Q16 and Q17 were used with permission from the *Center for Community College Student Engagement, Community College Survey of Student Engagement Additional Item Set: Student Financial Health*, The University of Texas at Austin. Permissions for additional items used or modified in the survey were obtained from the American College Health Association, the American Enterprise Institute (AEI), the Consortium on Financing Higher Education (COFHE), the National Collegiate Athletic Association (NCAA), New America, and the Pew Research Center.

**Exhibit 1. Questionnaire Overview**

Questionnaire Sections	Description
Consent and Survey Instructions	Series of screens to provide informed consent and instructions on how to navigate through the survey.
Sample Person Verification	Series of questions to confirm correct the sample member was completing the survey.
Q1-Q11	Series of questions to obtain their aspirations and attainment for their education, career planning, employment, and salary.
Q12-Q26	Series of questions to obtain information about their financial health, health insurance, democratic participation, and views on higher education.
Q27-Q38	Series of questions to obtain details on their mental and physical health and alcohol and drug use.
Q39-Q47	Series of questions to obtain information on other financial and education related items, including mentoring.
Q48-Q50	Series of questions to capture demographic data.
Incentive and Future Contact Info	Questions about the email to send their incentive and contact info for sample member and one additional person.

NORC IT staff programmed the final questionnaire in the Acuity4 Survey system (A4S), developed by Voxco, and optimized it for use on desktops, phones, and tablets. Survey pathing and text fills were driven by variables that were preloaded into the system (see *Section 2.3.1.2*) and by user responses to questions within the survey. The most important preload variables for pathing and text fill purposes were the sample member’s 2015 RCT group assignment and their level of engagement with the Bottom Line program which ranged from none (for all Controls and some Treatment sample members) to College Access program only to both College Access and College Success programs.

Questionnaire testing was iterative and began once initial programming of the survey instrument was completed. Survey testing was completed by the research team using multiple device types and web browsers. Initial testing focused on verifying the content, skip logic, and text fills in the survey specifications were correctly implemented across all possible preload variable combinations. Later rounds of testing included scripted data entry. Scripted data entry is a systematic method for comparing input and output data from the survey instrument to ensure that data is correctly captured. Additional testing was conducted after the survey pretest was completed in February 2019 in order to verify that revisions from the pretest findings were properly implemented (see *Section 2.2.2*).

Appendix A provides the survey content with variable names.

## 2.2.2 – Pretest

To ensure the integrity of web survey content and programming, a pretest of the web instrument was conducted for 8 days at the end of February 2019 with a convenience sample. Bottom Line advisors across the program sites nominated students who graduated in 2016 and were currently receiving Success services. All respondents to the survey were given a \$25 gift code to Amazon. Students were only contacted via email as this was a test of the instrument and not the data collection protocol. There were 102 current Bottom Line students in the pretest, 53 of whom responded to the survey in full and 4 in part - a 56% response rate. It is important to note, the pretest sample did not represent the actual sample in that it only included Success participants, unlike the full sample which includes individuals who did not receive Bottom Line services and only received Access services as well as those who received Access and Success services. The pretest sample was also one year younger than the original RCT sample.

The pretest survey instrument was additionally modified to include several feedback questions about the survey experience at key points in the questionnaire. Overall, respondents fully participated and did not skip questions. Pretest responses were reasonable and answers to the feedback questions were thoughtful. A common critique was respondents felt the main survey questions were too long. However, respondents that completed in one session did so in an average of 21 minutes. Those that completed in more than one session did so in an average of 32 minutes. These survey administration times are inclusive of the time spent on main survey questions as well as the extra feedback questions.

To better understand survey nonresponse, pretest nonrespondents received a final email that offered a \$5 Amazon gift code if they would reply and explain their reason for not participating. Three individuals responded to this email and expressed doubts that the survey and incentive offer were legitimate. This information was helpful for developing more effective outreach for the main data collection.

Review of the pretest survey results was conducted and very useful. Several survey items were modified based a review of the data and the feedback from the pretest respondents. In addition to these question updates, the pretest feedback questions were removed before finalizing the web instrument for the main data collection effort.

## 2.3 – Prefield Preparation

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Prefield preparation activities for the study included sample file preparation, development of a case management system, and advanced locating of sample members.

### 2.3.1 – Sample File Preparation

Bottom Line provided NORC with the main study sample files in December 2018. After cleaning and de-duplicating the records, the sample file included a total of 1,429 sample members: 995 treatment and 434 control sample members. The files included contacting information, demographics, and high school and college name, where available and applicable, for both groups; baseline survey data for respondents; and program status for treatment cases. The contacting information for the treatment group was more robust as those individuals were or continue to be engaged with the Bottom Line program and thus provided more up-to-date contacting information. The three files provided were as follows:

1. Treatment sample file,
2. Control sample file, and
3. RCT survey data file.



### 2.3.1.1 – Merge, Processing, and QC

To prepare the sample files for loading into the web survey and case management system (see *Sections 2.3.2 and 2.3.3* below), the following steps were taken:

- **Data merge.** As the data was in separate files, the treatment and control files were merged into one master file. As high school name was believed to be a valuable piece of information, especially for locating, the project staff requested and received this information from Bottom Line for the control cases, as it was only present in the original files for the treatment cases.
- **Pre-cleaning data QC.** The project staff reviewed the data so as to identify whether there were cases that fit the criteria: (A) did not have a valid ID from Bottom Line, (B) appeared in any file more than once, or (C) appeared in both the treatment and control files. This review resulted in the identification of 48 records in the survey data file with invalid IDs, one of which was identified as being present in the control sample file. The 47 records were discarded as not part of the sample, per Bottom Line. The remaining case was identified as a control case, per Bottom Line. Finally, 8 records in the survey data file were identified as being duplicates (belonging to 4 cases). The most complete records were kept.

Additional issues regarding missing data were identified and resolved:

- One case missing gender was logically imputed using data from the record and triangulating it with information found online.
- More significantly, 13 cases were missing race and/or ethnicity. Rather than attempt to impute the data, a question asking race/ethnicity was added to the survey to capture this information explicitly from these individuals.
- **Names and Contact information cleaning.** Project staff cleaned all names, addresses, and high school names so that proper case was enforced.
- **Post-cleaning data QC.** Project staff conducted a quality control check to verify that all records were unique. This included queries to test: (A) if any two records shared the same first and last name, (B) if any two records matched on birthdate and last name, (C) if any two records shared the same telephone number, and (D) if any two cases shared the same email address.

Steps B and C resulted in:

- 10 pairs of records that had the same birthdate and last name, and
- 8 pairs of records that had the same telephone number.

Project staff reviewed other data in the records (e.g., SSN, email, RCT group, first and last names, gender, and college name) and conducted Google searches in order to identify whether these records were true duplicates (i.e., two records representing the same individual), whether there was a quality issue, or whether there was no issue.

The majority of these matches (n=13) were appeared to be twins per the online searches conducted and consultation with Bottom Line. All 26 records remained in the sample file, but a note was entered into the case management system to alert sample managers and locating/prompting staff to regarding their possible duplicate status. One set of cases was determined to be a true duplicate, and one record from the pair was dispositioned as “duplicate case” and considered out of scope.

The final sample contained 1,429 sample members: 995 treatment and 434 control.

### 2.3.1.2 – Operational Variable Creation

Project staff created several variables to assist in sample management and systems operations. These were as follows:

- **Sample unit identification number (SUID).** A unique 8-digit ID was created for each sample member to protect sample member confidentiality and to help monitor individual cases.
- **PIN.** A 6-character alphanumeric personal identification number was created for each sample member that would be used to log in to their survey.
- **“Ask Race/Eth” flag.** A flag to identify the 13 cases missing race and/or ethnicity, so only these individuals were asked for these demographic questions in the survey.
- **Group2019.** A variable was created to divide the sample into three groups and was used to manage incentive eligibility, email/short message service (SMS) text contacts and text fills, and survey pathing and text fills. With consult from Bottom Line, the following groups were created:
  1. Control: Did not get selected for Bottom Line services (n=434).
  2. Treatment-incomplete: Selected for Bottom Line services, but did not complete the Access program (n=104).
  3. Treatment-complete: Selected for Bottom Line services, and at least completed the Access program (n=891).
- **BL\_Success.** A variable was created to identify which of the treatment-complete cases went on from the Access program (high school) into the Success program (college). This was used for survey pathing and text fills.
- **Incent\_Amt.** A variable was created to identify the amount of the incentive the case was assigned. This amount was updated several times during the field period. This appeared in the introduction to the survey and was used for email/SMS text fills. More information on incentives can be found in *Sections 2.4.1.1, 2.4.2.1, and 2.4.3.1.*
- **Email\_Samp.** A variable was created with the best known email address for the sample member, this appeared as a preload in the survey, where they could confirm (or deny) the email that should be used for receiving the incentive.

### 2.3.1.3 – Final Sample File Preparation Steps

Once the sample and preload file was completely assembled, the project team ran frequencies and crosstabs to ensure the quality of the data. An additional 10 test case records was added to the file of 1,429 sample members. The test cases were used to test the instrument in the production environment and monitor the outgoing messages email and text messages sent from the system. The final, prepared sample data was used to preload the production case management system and web instrument.

## 2.2.3 – Case Management Systems Development

NORC developed a Microsoft Access-based system using a controlled form user interface for managing the sample. The user interface of this case management system database was utilized for the following purposes:

- Maintain records of outgoing and incoming SMS text and email contacts,
- Review, facilitate, and document locating and telephone prompting attempts, and
- Record outgoing mail and receipt returned mail.

The user interface included a face sheet with important descriptive and demographic information about each case as well as the email addresses, telephone numbers, mailing addresses. Locating leads were also captured and viewed within this database. Contacting information could be updated using the user interface and records of call could be added by users. On a daily basis, the web survey status was imported, which allowed locators/promoters to exclude those cases from their task. All additions and edits were attributed to individual database users. The case management system allowed project managers to assign cases to locators and promoters as well as set priority for the assigned cases.

The resulting data in this database was used to run the weekly production report and other ad hoc reports. It was also used to determine the case sets for email, SMS text, and mail contacts.

The majority of emails and SMS text messages were sent via Voxco A4S, but a small number were sent outside of the system using Outlook.

The project maintained three email boxes and a toll-free number that were used solely for this project.

### 2.2.4 – Prefield Locating

Prefield locating was conducted between March 19, 2019 and April 4, 2019 on sample members for whom the available contacting information was possibly out-of-date or missing a phone number, email address, or mailing address. Training for the two prefield locators on the project staff took place on March 13, 2019.

The protocol for prefield locating involved two steps with a 20 minute time-limit for searching per case. For the first step, locators called any phone numbers for the sample member that were already available. If the sample member was reached, then the locator confirmed their best contact information for sending the survey invitation. If the sample member was not reached, then the second step was to conduct internet searches to locate new contact information and to assess if the available contact information was still up-to-date. Internet searches were mostly conducted through Google, using background and contact information from the sample file as key search terms. Additional phone calls to sample members and contact persons were made as new phone numbers were located.

Exhibit 2 shows a summary of the sample at the end of the prefield locating task.

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#### Exhibit 2. Prefield Locating Summary

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Prefield Locating Results	Sample	
	#	%
<b>Total Prefield Locating Cases</b>	<b>273</b>	<b>100.0%</b>
<i>Not Located<sup>a</sup></i>	17	6.2%
<i>Located</i>	256	93.8%
2+ types of contact info located	208	81.3%
1 type of contact info located	48	18.8%

<sup>a</sup> Includes 1 sample member who was reached by phone and refused to participate.

A total of 273 cases, about 19% of the sample, received locating prior to the start of data collection. Of those cases, about 94% were determined to be successfully located – meaning that there was at least one

type of contact information (phone number, email address, mailing address) where the sample member could most likely still be reached.

During the prefield locating period, the project staff was notified by Bottom Line about one sample member who passed away. That sample member was removed from consideration for prefield locating and from future contact during data collection.

## 2.4 – Data Collection

The survey data collection lasted 15 weeks. The first letter was mailed April 3, 2019 and the first email went out April 5, 2019. The final email and text message were sent July 14, 2019. The field period was divided into three phases: 1) Initial contact, 2) Interim contact, and 3) Final contact. Each phase’s duration and data collection objectives are in Exhibit 3. Appendix B contains a representative selection of contacts utilized across the phases.

**Exhibit 3.** Data Collection Phases and Objectives

Phase	Duration	Objective
Phase 1: Initial contact	April 3, 2019 – April 21, 2019	<ul style="list-style-type: none"> <li>■ Inform sample members about the study and provide them with web survey information via a mailed letter</li> <li>■ Complete survey with as many cooperative individuals with email and SMS text prompts</li> <li>■ Offer incentives to control and treatment-incomplete cases only</li> </ul>
Phase 2: Interim contact	April 22, 2019 – May 19, 2019	<ul style="list-style-type: none"> <li>■ Continue to contact individuals via email and SMS</li> <li>■ Begin telephone calls to prompt for the web survey</li> <li>■ Offer incentives to treatment cases</li> <li>■ Send catch-up mailed letter to newly located cases</li> </ul>
Phase 3: Final contact	May 20, 2019 – July 14, 2019	<ul style="list-style-type: none"> <li>■ Continue to contact individuals via email and SMS</li> <li>■ Continue telephone calls to prompt for the web survey, w/focus on specific groups</li> <li>■ Differentially increase incentives based on analytic domains</li> <li>■ Send catch-up mailed letter to newly located cases</li> </ul>

Each phase featured emails and SMS text contacts to invite and encourage sample members to participate in the survey. Starting in the Phase 2, telephone prompts began to ensure that sample members received our messages and to help identify refusals and locating problems. An invitation letter sent via U.S.P.S was sent at the start of the field period to all sample members with a mailing address and then two more times throughout the field period to catch up sample members for whom either did not have an address at the start or were believed to not have a good address at that time.

Two records did not receive any contacts during in data collection:

- The record which was identified as a duplicate of another record. That individual was contacted, but only under one record.
- The sample member identified by Bottom Line as being deceased during the prefield locating phase.

### 2.4.1 – Phase 1: Initial contact

Phase 1 of data collection began on April 3, 2019 and continued for 2.5 weeks. The primary objectives for this phase were to: 1) distribute the survey invitation to all sample members; 2) identify and address early questions and concerns; and 3) complete as many surveys as possible prior to the start of telephone dialing and the implementation of more extensive incentive offers in later phases.

The first survey invitations were sent by letter and email to all sample members with a mailing address and/or email address on file. Letters were mailed two days before the emails were sent, so that sample members received their letters on the same day as or soon after they received their email. Each of these contacts were personalized by sample member name and included their unique web login information. The invitations explained the purpose of the project, its importance, and why they were being contacted to take part in the survey. Emphasis and wording were tailored according to RCT status, so that members of the control and treatment-incomplete groups received one version of the letter and email and members of the treatment-complete group received a different version. All contacts included the project toll-free phone number and email address for those who wanted to reach the project staff. A total of 1,374 letters and 1,422 emails were sent during this initial wave of contacting.

In the week following the release of the first letters and emails, additional invitations were sent to secondary email addresses or telephone numbers. 523 sample members with a secondary email address were re-sent the initial invitation email. 1,257 sample members with a telephone number were sent a SMS message that was customized by RCT group and included the survey URL, their unique login PIN, and the project contact information.

The remaining major Phase 1 contacts were a follow-up email and a follow-up SMS text. These contacts were staggered so that sample members did not receive multiple contacts on the same day. Similar to the initial invitations, these contacts were tailored by RCT group and personalized with name and individual login information. In addition, a small number of sample members who had started but not yet completed the survey (breakoffs) were sent separate email and SMS text requests to finish their surveys.

Starting in Phase 1 and continuing until the end of data collection, project staff also conducted daily sample management tasks that bore on all prompts subsequent to the initial letter and email invitations. These regularized tasks included recording undeliverable letters, emails, and SMS messages; assessing sample member refusals; reviewing sample-person verification fails (web surveys where the respondent did not pass the initial eligibility questions, meaning that someone other than the sample member might have started it); and responding to sample member questions. Project staff logged each mailing address, email address, and phone number that was the target of an undeliverable prompt, which would then be excluded from future batches, and for which the associated sample member would typically be flagged as needing locating (see *Section 2.4.4* on Main Locating). Refusals to participate in the survey were identified by project staff who monitored emails, SMS text message replies, and voicemails left on the toll-free line. All refusals were categorized by severity, according to which the refusing sample member was excluded from some or all future contacts. Project staff also regularly reviewed breakoff web surveys to identify common issues that might be preventing survey completion.

At the end of Phase 1 of data collection, 195 out of 1,427 sample members who had been sent at least one letter, email or SMS had completed the full web survey, for a completion rate of 13.6%.

### 2.4.1.1 – Phase 1 Incentives

From the initial contact, all control and treatment-incomplete cases were offered a \$15 postpaid incentive in the form of an Amazon gift code delivered by email. Treatment cases were not offered an incentive. During Phase 1, 109 cases received an incentive for completing the full survey.

### 2.4.2 – Phase 2: Interim contact

Phase 2 of data collection took place over five weeks between April 22, 2019 and May 19, 2019. The primary activities of this phase were to send regular email and SMS text prompts to sample members, send catch-up prompts to newly located contact information, and begin making telephone calls to prompt for the web survey. The incentive strategy was also updated to start including sample members in the treatment-complete RCT group (see *Sections 2.4.2.1* and *2.4.2.2*).

For the duration of Phase 2, project staff sent out email and SMS text prompts at a rate of about one of each per week. These prompts were more succinct than the prompts sent out during the initial contact phase, since the vast majority of the recipient email addresses and telephone numbers had by then been contacted multiple times. The shorter messages varied to convey key themes, such as the ease of participating, the importance of their responses, and the Amazon gift code incentive. A catch-up letter to 80 newly located mailing addresses was also sent out the last week of April.

Telephone calling to sample members began the second week of Phase 2. Three project staff were assigned to this task, two of whom were also eventually cross-trained in main locating (see *Section 2.4.4*). Training was conducted the morning of April 29, 2019, and the phone prompting team started making calls the same day. Prompters engaged with sample members by providing information about the study, confirming preferred contact information for future outreach, responding to frequently asked questions, and documenting refusals and other feedback, and emailing web survey login information for quick turnaround, if requested. Prompters also left voicemail messages, documented phone numbers that they determined to be out-of-date, and flagged atypical call results for supervisor review. In total, prompters attempted phone calls to 1,024 sample members during Phase 2. The prompting team's extensive direct contact with sample members was also important for planning future contacts, as they reported on challenges and successes in gaining sample member cooperation, which informed email and SMS messages.

At the end of Phase 2 of data collection, 521 sample members had completed the full web survey, for an increase of 326 completes from the end of Phase 1. There were an additional 11 breakoffs that were considered completes for a completion rate of 37.2% for the whole sample by the end of Phase 2.

### 2.4.2.1 – Phase 2 Incentives

Incentive offers were increased at two points during Phase 2. The first increase was implemented on April 26, 2019 for 794 cases in the treatment-complete group. Within this group, nonrespondents who had participated in College Success were now offered a \$10 gift code, and those who had only participated in College Access were offered \$15. The decision to offer these specific amounts to these groups was made based on an experiment that was conducted earlier in April (see *Section 2.4.2.2*).

A smaller incentive increase was implemented on May 13, 2019 for 17 sample members who had started but not completed the web survey. This group was offered an additional \$5 on top of their original incentive if they re-entered and finished their survey, bringing their total offer to either \$15 or \$20. The response to this new offer was minimal and not repeated for future breakoffs, and a different strategy for incentives was adopted for the last phase of data collection (see *Section 2.4.3.1*).

### 2.4.2.2 – Experiment: Treatment Incentive Amount

After 3.4 weeks of data collection, the treatment-complete group – including those that participated in the Success program and those that just completed the Access program – was lagging behind projections. Due to this lag in web survey completes, the incentive offer scheduled to begin in Phase 2 would need to be offered to more cases than planned. In order to use the allotted incentive money most effectively, an experiment was conducted to determine whether the treatment group should be offered a postpaid \$10 or \$15 Amazon code incentive and whether subgroups reacted different to the differing amounts.

The experiment sample consisted of 89 treatment-complete cases selected from the approximately 800 nonresponse treatment complete cases. The experiment eligible sample was stratified by several different characteristics and randomly assigned to the \$10 or \$15 offer:

- Response status to the original University of Virginia survey in 2015,
- Success participation,
- Program Site (particularly Worcester, as it had the lowest completion rate), and
- Race (especially African American, as they had the lowest completion rate).

To be eligible for the experiment, the web survey had to remain untouched and the case could not be a refusal or ineligible for the survey.

The experiment email was sent on April 24, 2019 and an SMS text on April 25, 2019. The efficacy of the two different incentive offers was assessed based on whether the sample member logged into the survey by the end of the day April 25, 2019 regardless of whether the survey was completed. The experiment results are shown in Exhibit 4.

**Exhibit 4.** Treatment-Complete Incentive Experiment Results

Incentive Treatment	Success Participation	UVA Survey Response	Experiment Sample	Cases Accessed Survey	
				N	%
\$10	No	No	8	0	0%
\$10	No	Yes	11	1	9%
\$10	Yes	No	11	2	18%
\$10	Y	Yes	14	3	21%
<b>\$10 Incentive Group</b>			<b>44</b>	<b>6</b>	<b>14%</b>
\$15	No	No	9	2	22%
\$15	No	Yes	11	2	18%
\$15	Yes	No	12	0	0%
\$15	Yes	Yes	13	2	15%
<b>\$15 Incentive Group</b>			<b>45</b>	<b>6</b>	<b>13%</b>
<b>Overall</b>			<b>89</b>	<b>12</b>	<b>13%</b>

Assuming the incentive offer had a positive effect when a sample member accessed the survey, the results indicated the \$10 and \$15 offer had a similar impact on treatment-complete cases overall. However, the results suggest the \$10 offer was somewhat more effect on sample members participating in the Success program. Based on these findings, the project decided to offer a \$10 incentive to the Success participants and \$15 to those that did not participate in the Success program. This incentive protocol was made to the remaining, larger group of nonrespondent treatment-complete cases on April 26, 2019.

### 2.4.2.3 – Experiment: Email Subject and Sender

During week 5, the treatment-complete sample continued to lag behind projections, even with the incentive offer in week 4. The feedback from telephone prompting staff during their first week of calls demonstrated that sample members didn’t remember receiving the study’s previous emails and texts; also few refusals had been received. This suggested sample members were not opening and reading the emails and/or were not drawn in by the subject lines/messages. The decision was made to draft a very pithy email message and conduct an experiment to test different subject lines from two different emails accounts. Specifically, the experiment tested:

- **Alternate Email Subject Lines<sup>4</sup>.** “Greedy” subject line (focusing on the incentive) versus “Altruistic” subject line (focusing on helping others like them) and
- **Alternate Email Account Senders.** [Shana.Brown.CAPS19@norc.org](mailto:Shana.Brown.CAPS19@norc.org) versus [2019CAPS@norc.org](mailto:2019CAPS@norc.org).

The test was made up of all pending control and treatment-incomplete cases with emails, including breakoffs, and the four conditions were assigned randomly sorted by the following characteristics:

- UVA respondent status,
- Success participation,
- Program Site (especially Worcester, as it had the lowest completion rate), and
- Race (especially African American, as they had the lowest completion rate).

The email was sent to all email addresses on file for 348 cases on May 2, 2019. Experiment results shown by the number cases who accessed or completed the survey as of the afternoon of May 3, 2019 are in Exhibit 5.

**Exhibit 5.** Email Subject Line and Email Account Sender Experiment Results

From Email	Subject Line	Sample	Access Survey		Completed Survey	
			N	%	N	%
CAPS	Altruistic	87	2	2%	1	1%
CAPS	Greedy	86	5	6%	2	2%
Shana	Altruistic	87	5	6%	4	5%
Shana	Greedy	88	1	1%	0	0%
<b>Total</b>		<b>348</b>	<b>13</b>	<b>4%</b>	<b>7</b>	<b>2%</b>

Based on these results, the determination was made to send out an email using the Shana Brown email account with the Altruistic subject line to the nonrespondent treatment-complete cases on May 3, 2019.

### 2.4.3 – Phase 3: Final contact

Phase 3 of data collection was conducted over eight weeks between May 20, 2019 and July 14, 2019. During this final phase, project staff continued to send out regular email and SMS text messages. These prompts used different techniques to encourage survey response, particularly among sample members who appeared to be passively ignoring their earlier invitations. *Sections 2.4.3.2 and 2.4.3.3* describe two raffles that the project staff organized to improve production, and were the focus of prompts during the

<sup>4</sup> The Greedy subject line read “\$15 for your thoughts” while the Altruistic subject line read “Help underserved high school students & earn \$15.”



weeks of the drawings. Other themes used in email and SMS text messages explained how there was limited time remaining to complete the survey, how nobody in the survey sample could be replaced, how participation was confidential, how responses would contribute to social science research and towards improving programs like Bottom Line, and how the project staff understood sample members were busy but that the survey would only take 20 minutes. Project staff also used tailored references to sample member high schools and Bottom Line program sites to underscore how they would be representing their peers, and added tailoring to breakoff reminders that indicated about how much time it would take to complete the rest of the survey. As in Phase 2, email and SMS text messages went out at a rate of about one each per week to primary and secondary email addresses and phone numbers, with some weeks, such as raffle weeks and the final week of data collection, getting additional prompts.

Telephone calls to sample members continued throughout Phase 3 until the Friday before the final weekend of data collection (July 12, 2019). Telephone prompters called sample members no more than once per week and left voicemail messages when possible. Priority was given to sample members who did not answer their phone during an earlier dialing session. Those who were previously reached were not called back unless several weeks had elapsed without receiving a completed survey. In June, the prompting team also started calling contact person phone numbers that were provided by respondents to the 2015 survey, if direct numbers to the sample member were not available or not generating any response. Many of these phone numbers were out-of-date but some of them did reach family members who agreed to help put us in contact.

During Phase 3, the time window for telephone calling was adapted based on feedback from the phone prompting team. Prompters learned from experience that mornings tended to be the most difficult time of day to reach sample members, so a larger proportion of calling was scheduled for later in the day. Changes to staff availability also allowed for a limited amounts of weekday evening and weekend calling.

Targeting specific subgroups in the sample population was another element of Phase 3 of data collection. Project staff parsed the sample by key analytic domains to identify groups that were lagging in response and would benefit from special treatment. Top priority was given to sample members who were considered to have had a low-probability of attending a 4-year post-secondary institution. Certain combinations of male, Hispanic, black, and American Indian/Alaska Native demographic groups were also given priority. Sample members in high priority groups were offered an increased incentive for completing the survey (see *Section 2.4.3.1*) and were more frequently queued for telephone dialing and worked first by locating staff in their assignment loads.

Two additional efforts undertaken during Phase 3 were sending a final letter mailing to sample members with a previously unprompted address and the launching of a separate prompting effort conducted directly by Bottom Line staff. For the final letter mailing, 184 sample members were mailed a survey invitation to either a newly located address or to a secondary address that had not been prompted yet. That mailing went out on June 10, 2019. For the Bottom Line prompting effort, staff at Bottom Line sent email, text message, and phone call requests to current and prior College Access and College Success participants to ask them to participate in the survey. These prompts went out to all sample members who participated in a Bottom Line program in mid- and late-June, regardless of if they had already completed the survey. According to the confidentiality rules of the study, Bottom Line is not allowed to know the response status of individual respondents, so any reminders that they sent went to everyone by necessity.

A total of 368 sample members completed the web survey in Phase 3 in full, plus an additional 40 breakoffs were considered complete, for an overall completion rate of 65.8%. See *Section 3* for the final survey results and response rates.

### 2.4.3.1 – Phase 3 Incentives

Incentive amounts were increased three times during Phase 3 in the following ways to the following nonresponse sample members:

- **June 4, 2019.** 224 sample members who were classified as having a low-probability of attending a 4-year post-secondary institution were offered an increased incentive. Within this group, 68 sample members in the treatment-complete group had their incentive offer increased to \$25, and 156 in the control and treatment-incomplete groups were increased to \$30.
- **June 14, 2019.** 159 sample members who were (1) Hispanic and black, (2) male, or (3) American Indian/Alaska Native were offered an increased incentive, unless they were already being offered \$30. Within this group, 48 sample members were increased to \$25 and 111 were increased to \$30 depending on the amount of their previous offer.
- **June 28, 2019.** 344 sample members who were classified as having a low-probability of attending a 4-year post-secondary institution or who were in the control or treatment-incomplete group were offered an increased incentive. Within this group, 69 sample members who were both low probability 4-year and control/treatment-incomplete were offered \$50; 83 who were only low probability 4-year were offered \$40; and 192 who were only control/treatment-incomplete were offered \$35.

Project staff coordinated each of these incentive changes with email and SMS text messages that emphasized the increased amount. The locating and prompting team was also briefed about the changes and provided updated phone and voicemail scripts for presenting the new offer.

### 2.4.3.2 – Raffle #1: \$100 Amazon code

In order to boost production in the week leading up to the Memorial Day holiday, a \$100 Amazon gift code raffle was implemented during the first week of Phase 3. The raffle offer was in addition to the guaranteed designated postpaid incentive offer. The initial email to introduce the raffle – in which a winner would be randomly selected – was sent May 21, 2019 to all nonrespondents including breakoffs (See *Appendix C* for the language used). In addition to the initial email, the following contacts were made to remind sample members of the raffle and encourage survey response:

- An SMS text to reiterate the raffle introduction
- Email to breakoffs to thank them for starting the survey, asking them to finish, and remind them of the raffle
- Email to follow-up on the raffle offer
- An SMS text to reiterate the raffle offer follow-up
- Email to notify of the last day of the raffle
- Phone prompters were briefed on the raffle, with discretion to use it as a talking point. Phone prompting was attempted on 360 cases during the raffle period.

The message indicated to be entered in the raffle sample members should complete the survey between May 21, 2019 noon (ET) and May 27, 2019 11:59 pm (ET). In addition, in order to comply with an IRB requirement to allow those who decline participating in the survey, messages also included the statement: *To enter the drawing if you are unable to complete the survey, please call us at (877) 230-8315 by 5 pm (ET) on 5/27.*

Overall, 861 were offered the opportunity to enter the raffle and 52 completed and were eligible for the raffle selection. No nonrespondents called to request to be included. This response was about 46 percent fewer completes than the previous seven days.

#### 2.4.3.3 – Raffle #2: \$300 Amazon code

While the first raffle did not appear to appreciably increase survey response, it was unclear whether the low response during the raffle period was due to the Memorial Day holiday or if the amount was not high enough to be compelling. The project decided to implement a second raffle. The second raffle was initiated in week 13 for a \$300 Amazon code. Again, the raffle offer was in addition to the guaranteed designated postpaid incentive offer. The initial email to introduce the raffle was sent June 25, 2019 to all nonrespondents, including breakoffs (see *Appendix C* for the message language used). Explicit survey refusals were sent a special contact explaining the project understood they refused to participate, but wanted to ensure they received the raffle offer. In addition to the initial email, the following contacts were made to remind sample members of the raffle and encourage survey response:

- An SMS text to reiterate the raffle introduction
- Email to follow-up on the raffle offer
- An SMS text to reiterate the raffle offer follow-up
- Email to notify of the last day of the raffle
- An SMS text to notify of the last day of the raffle
- Phone prompters were briefed on the raffle, with discretion to use it as a talking point. Phone prompting was attempted on 88 cases during the raffle period.

The message indicated to be entered in the raffle sample members should complete the survey between June 25, 2019 noon (ET) and July 3, 2019 11:59 pm (ET). In addition, in order to comply with an IRB requirement to allow those who decline participating in the survey, messages also included the statement: *To enter the drawing if you are unable to complete the survey, please call us at (877) 230-8315 by 5 pm (ET) on 7/3.*

Overall, 527 were offered the opportunity to enter the raffle and 38 completed and were eligible for the raffle selection. No nonrespondents called to request to be included.

Midway through the raffle period, it became clear that the survey response to the raffle was not going to be appreciably higher even with the \$300 offer. To meet the survey's response rate goals, a structured increase to incentives was implemented June 28, 2019, during the raffle eligibility period (see *Section 2.4.3.1 – Phase 3 Incentives*). The nine-day response during the second raffle period was about 66 percent fewer completes than the previous nine days.

#### 2.4.4 – Main Locating

Main locating was conducted between April 5, 2019 and July 12, 2019 on unresolved cases from prefield locating, and on sample members where email bounced, SMS text messages were undelivered, USPS letters were returned, or telephone prompters discovered contact information was out-of-date. Locators who previously worked on prefield locating were briefed on the transition to main locating on April 5,

2019. A supplemental training on Accurint® locating<sup>5</sup> was held on April 19, 2019, and a full training for a third locator was held on May 29, 2019.

The protocol for main locating was similar to prefield locating and capped at 20 minutes per case. Locators first called any telephone numbers already on-file for the sample member and provided login information for the web survey if they could be reached. If the sample member was not reached, then locators conducted Google and other web searches to find new contact information or to verify existing contact information as up-to-date. Starting with Phase 2 of data collection, locators supplemented their general web searches with individual Accurint® searches.

Exhibit 6 summarizes the main locating conducted.

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**Exhibit 6.** Main Locating Summary

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Treatment	Sample	
	#	%
Did Not Receive Main Locating	1,054	73.8%
Received Main Locating	375	26.2%
<i>Not Located</i>	20	5.3%
<i>Located</i>	355	94.7%
2+ types of contact info located	264	74.4%
1 type of contact info located	91	25.6%

A total of 375 cases received locating during the main locating period, including cases that were already touched in prefield locating but needed additional work. Case assignments to locators were prioritized by key analytic domains, on an adaptive basis, to ensure that important subgroups with lower response rates were treated first and received individual Accurint® searches if they had not earlier. Of the cases that received locating, about 95% had at least one type of contact information (phone number, email address, mailing address) where the locator determined that the sample member could be reached and should be sent a prompt.

During Phase 3 of data collection, a contact person for one of the sample members confirmed over the phone that the sample member was incarcerated. That sample member was removed from future locating and prompting and finalized as ineligible for the survey.

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<sup>5</sup> Accurint® is a widely accepted locate-and-research tool available to government, law enforcement and commercial customers for a fee. Its proprietary data-linking technology returns search results in seconds to the user's desktop. NORC has an established Accurint® account and agreement in place where NORC input search data are not appended to Accurint®'s database and footprint of the search is not recorded.

## Section 3 – Survey Results and Response Rates

By the end of data collection, 1,427 sample members out of the total sample of 1,429 RCT members were contacted. In addition to the two records being identified as ineligible before the start of data collection, an additional case was identified as being incarcerated during data collection and coded as ineligible. Of the cases contacted, 988 cases answered at least one question after the screener (and were included in the researcher team data delivery). Ultimately 964 cases answered survey items through Q11 (item asking about the number of hours and weeks worked). This latter criteria was used for the response rate calculation and case inclusion in the public use file and increased the final number of complete surveys by 24 for a final unweighted survey response rate of 67.6%. By the conclusion of the project, a total of 873 partial and complete respondents were eligible to receive an incentive.

The exhibit below summarizes the final outcomes for the sample.

**Exhibit 7.** Survey Outcomes

Final Outcome	Response Rate Group	Sample	
		N	%
Completed – full	Respondent	889	62.2%
Completed - breakoff	Respondent	75	5.2%
Ineligible	Ineligible	3	0.2%
Refusal	Nonresponse	85	5.9%
Other nonrespondents (known eligibility)	Nonresponse	116	8.1%
Noncontact/locating problems (unknown eligibility)	Unknown Eligibility	261	18.3%
<b>Total</b>		<b>1,429</b>	<b>100.0%</b>

Throughout data collection, the project team tracked cases of interest. We were particularly interested in monitoring response by RCT group, predicted 4-year enrollment, Bottom Line program site, and baseline survey participation. Exhibits 8 and 9 show the survey outcomes for the former two. Exhibit 10 provides the overall response rate<sup>6</sup>.

<sup>6</sup> AAPOR RR4 was utilized for response rate calculation.

**Exhibit 8.** Survey Outcomes by RCT Group

RCT Group	Sample N	Completed		Ineligible		Refusal/ Other NR		Unknown Eligibility	
		#	%	#	%	#	%	#	%
Treatment-Complete	891	651	73.1%	1	0.1%	106	11.9%	133	14.9%
<i>Success Participant</i>	542	420	77.5%	1	0.2%	60	11.1%	61	11.3%
<i>Non-Success Participant</i>	349	231	66.2%	0	0.0%	46	13.2%	72	20.6%
Treatment-Incomplete	104	47	45.2%	0	0.0%	18	17.3%	39	37.5%
Control	434	266	61.3%	2	0.5%	77	17.7%	89	20.5%
<b>Total</b>	<b>1,429</b>	<b>964</b>	<b>67.5%</b>	<b>3</b>	<b>0.2%</b>	<b>201</b>	<b>14.1%</b>	<b>261</b>	<b>18.3%</b>

**Exhibit 9.** Survey Outcomes by Predicted 4-Year Enrollment

Predicted 4-Year Enrollment	Sample N	Completed		Ineligible		Refusal/ Other NIR		Unknown Eligibility	
		#	%	#	%	#	%	#	%
High Probability	1,087	752	69.2%	3	0.3%	160	14.7%	172	15.8%
Low Probability	342	212	62.0%	0	0.0%	41	12.0%	89	26.0%
<b>Total</b>	<b>1,429</b>	<b>964</b>	<b>67.5%</b>	<b>3</b>	<b>0.2%</b>	<b>201</b>	<b>14.1%</b>	<b>261</b>	<b>18.3%</b>

**Exhibit 10.** Response Rate

Student Survey Final Status	Cases
Completed	964
Ineligible	3
Refusal/Other Nonresponse	201
Unknown Eligibility	261
Unweighted Eligibility Rate	99.7%
Unweighted Response Rate	67.6%

## Section 4 – Data File Creation and Public Use File

### 4.1 – Data File Processing

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The development of the survey data file and accompanying documentation began immediately following the end of data collection. The data source file was a Microsoft Excel extract from A4S and the main data file processing and formatting steps for delivery were comprised of the following:

1. Creation of derived variables. Survey data were used to calculate a handful of variables used in analysis (e.g., hourly wage).
2. Assigning reserve codes to missing data. Three reserve codes were used to explain missing survey data:
  - -3 Break-off: This value was used for items that were not seen by the respondent because they broke off in the survey.
  - -4 Refusal: This value was used for items that were seen, but not answered by the respondent because they refused to provide a response.
  - -5 Logical skip: This value was used for items that were not seen by the respondent because a previous survey response triggered a skip pattern programmed in the instrument.
3. Creation of variable and value labels. As part of the survey development, all items and mark all responses were assigned a variable name. During data processing, descriptive variable names were also assigned.
4. Verbatim review. All verbatim responses, including the final comment and other-specify responses, were reviewed to scrub them of PII.
5. Application of formats. Formats were developed and applied to the data set.
6. Creation of a codebook. A codebook was created that provided variable names, labels, formats, and frequencies for all survey items.
7. Conversion to STATA. The file was created in SAS, but exported to STATA.

In addition to the survey data file, additional files comprised the delivery package. These are described in *Sections 4.2 and 4.3*.

### 4.2 – Main Survey Data Package Contents

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The following were included as part of the main survey data package for analysis by the research team:

1. Delivery memo: Described the contents of the package and notes regarding the data.
2. Survey data in STATA: Contained close-ended survey item responses, derived variables, open-ended survey item verbatim responses, flags for further review, and metadata.
3. Syntax: Contained code for the derived variables and review flags. Examples of derived variables were hourly wage and Body Mass Index (BMI). The review flags were created to identify a small number of values that could be unreliable and that would need additional review and cleaning prior to use.
4. Codebook: Provided variable names and associated labels and frequencies.

5. Annotated questionnaire: Listed variable names, response values, and programmed skip logic.
6. Constructs or composite variables: Contained potential constructs and composite variables and the data sources that may be of interest in analysis.

Although the response rate was based on cases that completed through question item 11, the data file contained data for all cases that responded to at least the first question (n=988).

### 4.3 – Survey Detail Data Package Contents

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To supplement the survey data file- again for use by the research team - a second package was developed which was comprised of a STATA file with case-level sample data and paradata and a file layout file. Examples of the sample data were race, sample type, and program site. Examples of the paradata were final incentive offer amount, final survey dispositions, and flag to indicate whether cases received locating or not.

### 4.4 – Public-Use File (PUF)

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For the public-use file and documentation, the following package was produced:

- Comma-separated values (CSV) format data file,
- SAS format data file.
- Data user’s guide,
- Data layout file,
- Codebook, and
- Annotated questionnaire.

This package was hosted on NORC’s website (<http://www.norc.org/Research/Projects/Pages/bottom-line-2019-follow-up-survey.aspx>) and users could download the package for analysis.

#### 4.4.1 – Coding

NORC used responses to the “Other, Specify” items at Q1 (DEGOTH\_OS) and Q44 (MAJOR\_OS) to back code to the existing code frames, if applicable, based on a manual review of the text verbatims.

#### 4.4.2 – Variables dropped from PUF

The PUF contained a subset of variables from the research team’s survey data file.

NORC excluded all open text response items from the PUF, specifically Q2 (JOB30) and the “Other, Specify” items at Q1 (DEGOTH\_OS) and Q44 (MAJOR\_OS). Demographic items for ethnicity, race, marital status, and number of children were also excluded, as well as non-research-related items related to sample person verification, incentive distribution, future contacting information, and general survey comments.

NORC included an analysis ID rather than the case ID utilized for survey operations at NORC or the original case ID established in the RCT to maintain confidentiality.

#### 4.4.3 – Variables appended to PUF

NORC appended several non-survey variables to the PUF to assist with analysis.



NORC created a dose variable (DOSE) based on Bottom Line participant status to append to the PUF. This item identifies whether the respondent participated in a Bottom Line program, and if so whether they only participated in College Access or also participated in College Success.

Instead of providing separate ethnicity and race items, as it was collected in the survey at Q48a and Q48b, NORC developed a combined ethnicity and race item (RACE\_PUF) for the PUF. This item is based on responses to Q48a and Q48b, and also on existing ethnicity and race information provided by Bottom Line in the sample data if Q48 did not need to be asked.

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Appendix A. 2019 CAPS Web Survey

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# 2019 Follow-up to the College Application Process Survey (2019 CAPS)

## Annotated Web Survey

### General Notes

Programming notes are in green font. These include skip logic for item entry and exits, names for INPUT variables, and other notes regarding specifics to the item or screen.

Screen names are in Orange.

Item text and inputs are in normal black font, and {preloaded merged text is bolded and in brackets}.

Item inputs that are verbatim text are followed by a text box:

. Unless otherwise noted, all text boxes are open-character.

Item inputs that are single select options are preceded by a code and radio button:

Item inputs with a Likert-type scales display a chart with the description of the scale in the first row and radio buttons and codes for each variable in subsequent rows. The first column has the associated variable name.

	Item	Disagree	Neither Agree/Disagree	Agree
Variable	Item text	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>

All items where a REF is provided (i.e. SM clicked next without answering an item) follow the EXIT LOGIC of the item as the final else statement, if any, unless otherwise specified in the logic.

### Preloaded Variable List

The following list of items is preloaded into the survey instrument and used within the survey as logic drivers or merge variables in item text.

Preload Var	Var Type	Code	Label/Description
<b>FNAME</b>	String		First name of Sample Member
<b>LNAME</b>	String		Last name of Sample Member
<b>EMAIL_SAMP</b>	String		Email of Sample Member from sample file
<b>INCENTIVE_ELIG</b>	Numerical	1	Eligible for incentive
		2	Not eligible for incentive
<b>GROUP2019</b>	Numerical	0	Control
		1	Treatment-Incomplete
		2	Treatment-Complete
<b>BL_SUCCESS</b>	Numerical	0	Not Bottom Line College Success participant
		1	Bottom Line College Success participant
<b>INCENT_AMT</b>	String		Amount of incentive
<b>ASK_RACE</b>	Numerical	0	Do not need to ask race
		1	Need to ask race
<b>PIN</b>	String		Unique PIN assigned to each respondent, required to enter survey

## Questionnaire: Login, Consent, & Instructions

### Login



2019 Follow-up to the College Application Process Survey (2019 CAPS)

PIN:

EXIT LOGIC: Go to InformedConsent

### InformedConsent

**Welcome to the 2019 Follow-up to the College Application Process Survey (2019 CAPS)!** To better understand the impact of college advising programs and assess current attitudes and life experiences among young adults who [If GROUP2019 = 0 or 1, then display “applied for”. If GROUP2019 = 2, then display “participated in”] the Bottom Line College Access program, we’re asking you to take this survey. [If GROUP2019 = 0 or 1 then display “Even if you did not participate in the program, your feedback is very important!”]

**We want to know about your unique life experiences.** This 20 minute survey asks about a variety of topics including education, your health, and the ways you spend your time. Some of the questions may feel personal. We hope you answer fully and truthfully, but know that your participation is voluntary, and you may skip any question you do not wish to answer.

**The survey is confidential.** All survey answers are stored in a secure location and will only be seen by the research team. No one from Bottom Line, including advisors, will ever have access to your individual survey responses or know how or if you specifically answered the questions. When results of this survey are published or shared with Bottom Line, the data will be summarized so no one will be able to personally identify you with your answers.

**This research is covered by a Certificate of Confidentiality from the National Institutes of Health.** Please understand this Certificate does not stop you from voluntarily sharing information about yourself or talking about your involvement in this study. It simply means no one in the government can make the study researchers break their promise of confidentiality to you. This Certificate ensures an extra level of privacy. Your survey answers are protected by this Certificate and cannot be disclosed to anyone who is not connected with the research. The study researchers may not disclose or use information that may identify you in any government (federal, state, or local) action, suit, or proceeding. Your answers may not be used as evidence, even if there is a court subpoena, unless you have agreed to this use.

DISPLAY: Display the following paragraph if INCENT\_ELIG = 1. This paragraph requires the merged preload, INCENT\_AMT.

**You will receive a [INCENT\_AMT] Amazon gift code for your honest effort to participate in this survey.** At the end of the survey, you will be asked to provide the best email address to send your gift code, and we’ll send it to you at that address within 5 business days.

DISPLAY: Display the following paragraphs for everyone.

**NORC at the University of Chicago is conducting the survey.** NORC is an independent, non-profit research organization. The Carnegie Corporation of New York is funding the survey. Bottom Line endorses this survey and hopes the results will help them learn more about their program.

- *If you have any questions about this survey*, please contact the 2019 CAPS research team at NORC at **XXX@norc.org** or by phone at 1-877-XXX-XXXX.
- *If you have questions about your rights as a study participant*, you may call the NORC Institutional Review Board Administrator, toll-free, at 1-866-309-0542.

**Your participation is important to the success of this survey. We appreciate your input!**

Click “Next” to start the survey.

EXIT LOGIC: Go to NAV\_INSTRUCT

### NAV\_INSTRUCT

- Please use the *Next* or *Previous* buttons, not your browser’s Back or Forward buttons to move through the survey.
- If you need to exit the survey prior to completion, please click on the *Save & Exit* button. All responses that you have provided to that point are securely stored, and you can resume the survey at your convenience.
- The responses you provide are being collected with software that is designed to secure your data and provide you with confidentiality. However, no one can guarantee complete confidentiality for data that is sent over the Internet.

EXIT LOGIC: Go to SPV\_Q1

## Questionnaire: Sample Person Verification

### SPV\_Q1

INPUT VAR: SPV1

ITEM INFO: Drop down menu with numbers 2000-2018 (descending order), and “Before 2000” and “Did Not Graduate” as options for selection.

To make sure we’ve reached the right person, we have a few quick questions.

In what year did you graduate high school?

Recorded Code	Displayed Option
0000	Did not graduate high school
2018	2018
2017	2017
2016	2016
2015	2015
2014	2014
2013	2013
2012	2012

2011	2011
2010	2010
2009	2009
2008	2008
2007	2007
2006	2006
2005	2005
2004	2004
2003	2003
2002	2002
2001	2001
2000	2000
1999	Before 2000

EXIT LOGIC: Go to SPV\_Q2

SPV\_Q2

INPUT VAR: SPV2, SPV2\_OS

ITEM INFO: Input for SPV2\_OS is a text box included with option 6 "Other".

DISPLAY: Display the following prompt for cases where SPV1 is between 2000 and 2018 or "Before 2000".

In what city was the high school you graduated from?

DISPLAY: Display the following prompt for cases where SPV1 is "Did Not Graduate" or MISSING.

What was the location of the high school you last attended?

DISPLAY: Display the following for all cases. Text box for SPV2\_OS only appears if option 6 is selected.

- 1  Boston, MA
- 2  Chicago, IL
- 3  Houston, TX
- 4  New York, NY
- 5  Worcester, MA
- 6  Other

EXIT LOGIC: Go to SPV\_Q3

SPV\_Q3

INPUT VAR: SPV3

ITEM INFO: This page requires the two merged preloads, FNAME and LNAME.

Our records show your name is:

[FNAME] [LNAME]

Is this correct?

- 1  Yes
- 2  No

EXIT LOGIC: If "Yes", go to Q1.  
Else, go to SPV\_Q3\_2

SPV\_Q3\_2

INPUT VAR: SPV3\_VER

ITEM INFO: This page requires the two merged preloads, FNAME and LNAME.

Did you ever go by the name...

[FNAME] [LNAME]

- 1  Yes
- 2  No

EXIT LOGIC: If "Yes", go to Q1.  
If "No," go to SPVCLOSE.  
If MISSING and SPV1 is between 2014 and 2018 and SPV2 is 1 or 4 or 5, go to Q1.  
Else, go to SPVCLOSE.

SPVCLOSE

This survey is for students who graduated high school in 2015 and applied to be a part of the Bottom Line College Access program.

If you have reached this page in error and are eligible for this survey, please contact us by phone at 1-877-XXX-XXXX or by email at XXX@norc.org.

Thank you very much for your time.

## Questionnaire: Core Survey Items

Q1

INPUT VAR: DEGVOC, DEGASS, DEGBA, DEGMA, DEGPHD, DEGMD, DEGJD, DEGOTH, DEGOTH\_OS

ITEM INFO: Input for DEGOTH\_OS is a text box included with DEGOTH. The text box only displays if options 1, 2, or 3 are selected for DEGOTH.

IT INFO: Instructions for soft check (probe): If respondent attempts to advance the screen, but any of DEGVOC, DEGASS, DEGBA, DEGMA, DEGPHD, DEGMD, or DEGJD are MISSING, then display the soft check **"It is very important that we get a complete answer to this question."**



The following questions ask about any educational experiences after high school you have had or plan to have.

Please indicate all academic degrees and/or certificates you aspire to, are working toward, or have already earned.

	1. Aspire to	2. Currently enrolled	3. Earned	4. Not interested in this degree
DEGVOC A. Certificate / Vocational degree	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>
DEGASS B. Associate’s Degree (2-year)	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>
DEGBA C. Bachelor’s Degree (4-year)	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>
DEGMA D. Master’s Degree	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>
DEGPHD E. Doctorate (Ph.D., Ed.D., etc.)	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>
DEGMD F. Medical Degree	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>
DEGJD G. Law Degree	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>
DEGOTH H. Other (Please describe) DEGOTH_OS <input type="text"/>	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>

EXIT LOGIC: Go to Q2.

Q2

INPUT VAR: JOB30

ITEM INFO: Input is a text box.

The next several questions ask about your future and current employment, as well as general questions regarding your finances.

As things stand now, what is the job or occupation you expect to have at age 30?

*For example: registered nurse, personnel manager, secretary, accountant, high school math teacher*

Expected job or occupation:

EXIT LOGIC: If MISSING, go to Q4.  
Else, go to Q3.

Q3

INPUT VAR: JOB30SAL

ITEM INFO: Input is a drop down menu.

What is your best estimate of how much you would earn per year at this job or occupation at age 30?

Select a response from the drop down menu:

Recorded Code	Displayed Option
1	Less than \$20,000

2	\$20,000 - \$29,999
3	\$30,000 - \$39,999
4	\$40,000 - \$49,999
5	\$50,000 - \$59,999
6	\$60,000 - \$69,999
7	\$70,000 - \$79,999
8	\$80,000 - \$89,999
9	\$90,000 - \$99,999
10	\$100,000 - \$109,999
11	\$110,000 - \$119,999
12	\$120,000 - \$129,999
13	\$130,000 - \$139,999
14	\$140,000 - \$149,999
15	\$150,000 or more

EXIT LOGIC: Go to Q4

Q4

INPUT VAR: PREPEMPL, PREPLAN

As you make plans to start or grow a career, how confident are you in your ability to do the following?

	1. Very confident	2. Generally confident	3. Somewhat confident	4. Not confident at all
PREPIDEM A. Identify appropriate employers and positions	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>
PREPLAN B. Effectively plan your own career	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>

EXIT LOGIC: Go to Q5

Q5

INPUT VAR: EXPINTN, EXPEXTN, EXPAPPR, EXPSHAD, EXPPRAC, EXPCOOP

Since graduating high school, have you worked in any of the following capacities? Please consider both paid and unpaid experiences.

*To display a definition for each experience hover over the text (desktop users) or tap the information icon (mobile device users).*

	1. Yes, I have done this	2. No, but I'm planning on doing this	3. No, I would like to but can't (because of finances, availability, etc.)	4. No, I have no interest	5. I don't know
EXPINTN A. Internship	1○	2○	3○	4○	5○
EXPEXTN B. Externship	1○	2○	3○	4○	5○
EXPAPPR C. Apprenticeship	1○	2○	3○	4○	5○
EXPSHAD D. Career shadowing	1○	2○	3○	4○	5○
EXPPRAC E. Practicum	1○	2○	3○	4○	5○
EXPCOOP F. Co-op experience	1○	2○	3○	4○	5○

DISPLAY: Hover boxes display the following text when hovering over each of these terms in the question grid:

“Internship”: “Internships are positions for students or trainees who work in an organization in order to gain work experience or satisfy requirements for a qualification”

“Externship”: “Externships are short-term experiential learning opportunities for students in order to become familiar with new professions and job fields”

“Apprenticeship”: “Apprenticeships are career pathway programs that include both a paid-work component and an educational or instructional component”

“Career shadowing”: “Career shadowing is an educational program where a person spends time accompanying an experienced professional as they perform their job”

“Practicum”: “Practicums are supervised courses of study where students participate in applying their theoretical knowledge in a practical setting”

“Co-op experience”: “Co-op experience is a structured program of practical work experience, for academic credit, combined with classroom-based education”

EXIT LOGIC: Go to Q6

## Q6

INPUT VAR: CDEVRES, CDEVINT, CDEVCOUN, CDEVFAIR, CDEVNTWK, CDEVWEB

IT INFO: Instructions for soft check (probe): If respondent attempts to advance the screen, but any of CDEVRES, CDEVINT, CDEVCOUN, CDEVFAIR, CDEVNTWK or CDEVWEB are MISSING, then display the soft check “It is very important that we get a complete answer to this question.”

Please tell us which of the following activities you have done in the last year:

	1. Yes	2. No
CDEVRES A. Written or revised a resume or cover letter	1○	2○
CDEVINT B. Had help from a friend, co-worker, faculty member, etc. with interview preparation	1○	2○

CDEVCOUN C. Received career counseling	1○	2○
CDEVFAIR D. Attended a career fair/recruiting event	1○	2○
CDEVNTWK E. Attended a networking event	1○	2○
CDEVWEB F. Used website resources to look for a job (LinkedIn, Indeed, ZipRecruiter, etc.)	1○	2○

EXIT LOGIC: Go to Q7.

Q7

INPUT VAR: EMPSTAT

Which best describes your current employment situation?

*Include only employment that is for pay or profit. Do not include participation in the Federal Work-Study program. Full-time employment is 35 or more hours per week at a single job. Part-time employment is less than 35 hours per week at each individual job even if you work full-time hours across multiple jobs.*

- 1○ Employed full-time
- 2○ Employed part-time, but looking for full-time work
- 3○ Employed part-time, by choice
- 4○ On temporary leave from a job (due to pregnancy, disability, etc.)
- 5○ Not employed, looking for work
- 6○ Not employed, not looking for work

IT INFO: If respondent clicks “Next” without selecting a response, then display soft check in bold red. **“It is very important that we know your current employment status. This information is used to determine subsequent questions in this survey. Please answer to the best of your ability.”**

EXIT LOGIC: If EMPSTAT = 1 or MISSING, go to Q9.  
 If EMPSTAT = 2 or 3, go to Q8.  
 If EMPSTAT = 4 or 5 or 6, go to Q12

Q8

INPUT VAR: PTJOB

ITEM INFO: Text box input is numeric range from 0-9.

How many part-time jobs do you currently have?

Number of part-time jobs:

IT INFO: If respondent clicks “Next” and PTJOB is not between and including 0 and 9, then display soft check in bold red. **“Please provide a number between 0 and 9.”**. If they chose not to fix the data, they should be able to get past it to the next item.

EXIT LOGIC: Go to Q9.

Q9

INPUT VAR: EARNUNIT

DISPLAY: Display if (PTJOB is 2 or greater) OR (EMPSTAT is MISSING) OR (EMPSTAT ≠ 1 and PTJOB is MISSING) OR (PTJOB < 1 and PTJOB is not empty).

Think of your main job – the one you work the most hours on in a typical week. What is the easiest way for you to report your total earnings before taxes or other deductions on that job: hourly, weekly, bi-weekly, monthly, or annually?

DISPLAY: Else, display the following prompt for cases where Q7 (EMPSTAT) = 1 or Q8 (PTJOB) = 1.

What is the easiest way for you to report your total earnings from your job before taxes or other deductions: hourly, weekly, bi-weekly, monthly, or annually?

DISPLAY: Display the following for all cases.

- 1  Hourly
- 2  Weekly
- 3  Bi-weekly
- 4  Monthly
- 5  Annually
- 6  I am not working [Display response option 6 only if EMPSTAT = MISSING]

EXIT LOGIC: If EARNUNIT = 6, then skip to screen Q12.  
Else, go to screen Q10.

Q10

INPUT VAR: SALARY

ITEM INFO: Text box input is numeric range from 0-999,999.

Including overtime pay, tips, and commission, what are your usual [Fill in-line based on value of EARNUNIT: 1 = hourly, 2 = weekly, 3 = bi-weekly, 4 = monthly, 5 = annual, MISSING = hourly] earnings on this job before taxes or other deductions?

*Please round to nearest dollar.*

[Fill in-line based on value of EARNUNIT: 1 = Hourly, 2 = Weekly, 3 = Bi-weekly, 4 = Monthly, 5 = Annual, MISSING = Hourly] earnings \$ .00

IT INFO: If respondent clicks “Next” and SALARY is not between and including 0 and 999,999, then display soft check in bold red. **“Please provide a number between \$0 and \$999,999.”** If they chose not to fix the data, they should be able to get past it to the next item.

EXIT LOGIC: Go to Q11/NUMUNITS.

Q11

INPUT VAR: NUMUNITS

ITEM INFO: Text box input is numeric range from 0-99.

On average, how many hours per week, do you currently work at your [If PTJOB: > 1, the fill “main job”. Else fill “job”.]?

Average number of hours:

IT INFO: If respondent clicks “Next” and NUMUNITS is not between and including 0 and 99, then display soft check in bold red. “**Please provide a number between 0 and 99.**”. If they chose not to fix the data, they should be able to get past it to the next item.

EXIT LOGIC: If EARNUNIT = 4 or 5 Go to Q11\_1/WKUNITS  
If EARNUNIT = 1 or 2 or 3 or MISSING Go to Q12.

Q11\_1

INPUT VAR: WKUNITS

ITEM INFO: Text box input is numeric range from 0-52.

Approximately, how many weeks per [Fill in-line based on value of EARNUNIT: 4 = month, 5 = year] do you work at your [If PTJOB: > 1, the fill “main job”. Else fill “job”.]?

*Include paid vacation and sick leave.*

Average number of weeks:

IT INFO: If respondent clicks “Next” and WKUNITS is not between and including 0 and 52, then display soft check in bold red. “**Please provide a number between 0 and 52.**”. If they chose not to fix the data, they should be able to get past it to the next item.

EXIT LOGIC: Go to Q12.

Q12

INPUT VAR: AFFORD

Indicate the extent to which you agree or disagree with the following statement: I usually have enough money to buy the things I need (groceries, paying bills, etc.).

- 1  Agree
- 2  Somewhat agree
- 3  Somewhat disagree
- 4  Disagree

EXIT LOGIC: Go to Q13.

Q13

INPUT VAR: FINMGMT

How sure do you feel about your ability to manage your own finances?

- 1  Not sure at all - I know very little about money management
- 2  Not too sure - I know a little about money management
- 3  Somewhat sure - I understand most of what I need to know
- 4  Very sure - I understand money management very well

EXIT LOGIC: Go to Q14.

Q14

INPUT VAR: ACCTCHK, ACCTSAV

Do you currently have a checking and savings account in your name only or shared with someone else?

	1. No, I do not have account	2. Yes, in my name only	3. Yes, joint account shared with someone else
ACCTCHK A. Checking account	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>
ACCTSAV B. Savings account	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>

EXIT LOGIC: Go to Q15.

Q15

INPUT VAR: FSUPJOB, FSUPSO, FSUPPAR, FSUPEDU, FSUPUE, FSUPWELF, FSUPOTH

During all of last year (January 1 to December 31, 2018), how much of your general financial support came from each of the following sources?

		1. No support	2. Some support	3. A lot of support
FSUPJOB	A. Your job	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>
FSUPSO	B. Your spouse / significant other	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>
FSUPPAR	C. Your parents / guardians	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>
FSUPEDU	D. Educational benefits (financial aid, loans, scholarship, etc.)	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>
FSUPUE	E. Unemployment compensation	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>
FSUPWELF	F. Welfare (TANF, food stamps, etc.)	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>
FSUPOTH	G. Other sources	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>

EXIT LOGIC: Go to Q16.

Q16

INPUT VAR: BDGTFREQ

Which option best describes how often you budget your money (how you keep track of how much money you make, how much you spend, and how much you save)?

- 1  Never, but I should
- 2  Weekly or more often
- 3  Every two weeks
- 4  Monthly
- 5  I do not need to budget my money

EXIT LOGIC: If BDGTFREQ = 1 or 5, go to Q18.  
Else, go to Q17.

Q17

INPUT VAR: BDGTFUTR

When you budget for your future living expenses, which of these time frames is most important to you?

- 1  The next week
- 2  The next couple of weeks
- 3  The next few months
- 4  The next year or longer
- 5  I do not budget for my future living expenses

EXIT LOGIC: Go to Q18.

Q18

INPUT VAR: HLTHINS

Do you currently have health insurance?

*A health insurance policy could be through your your parents'/guardians' plan, your educational institution, your employer, or purchased as private health insurance, etc.*

- 1  Yes, through an insurance policy
- 2  Yes, through Medicaid
- 3  No

EXIT LOGIC: Go to Q19.

Q19

INPUT VAR: EFFCTZN

We are interested in learning what is important to you and the ways in which you may interact with your community through political and other social activities.



Which statement comes closer to your own views, even if neither is exactly right?

- 1  Ordinary citizens can do a lot to influence the government in Washington, D. C. if they are willing to make the effort
- 2  There's not much ordinary citizens can do to influence the government in Washington, D. C.

EXIT LOGIC: Go to Q20.

Q20

INPUT VAR: EFFVOTE

Which statement comes closer to your views, even if neither is exactly right?

- 1  Voting gives people like me some say about how government runs things
- 2  Voting by people like me doesn't really affect how government runs things

EXIT LOGIC: Go to Q21.

Q21

INPUT VAR: CIVATTD, CIVVOL, CIVCONT, CIVDON, CIVDISP

Please indicate if you have done each of the following activities in the last two years.

	1. Yes	2. No
CIVATTD A. Attended a political rally, protest, speech, or campaign event	1 <input type="radio"/>	2 <input type="radio"/>
CIVVOL B. Worked or volunteered for a political party, candidate, or a group that tried to impact public policy	1 <input type="radio"/>	2 <input type="radio"/>
CIVCONT C. Contacted any elected official or a politician	1 <input type="radio"/>	2 <input type="radio"/>
CIVDON D. Contributed money to a candidate running for public office or a group working to impact public policy	1 <input type="radio"/>	2 <input type="radio"/>
CIVDISP E. Displayed a political or campaign poster, bumper-sticker, or lawn sign, wore clothing and/or used social media (Twitter, Facebook, etc.) to publically express your support for a political campaign	1 <input type="radio"/>	2 <input type="radio"/>

EXIT LOGIC: Go to Q22.

Q22

INPUT VAR: VOTEREG

Are you currently registered to vote in national, state, and local elections?

- 1  Yes
- 2  No
- 3  I'm currently ineligible to vote

EXIT LOGIC: If VOTEREG = 2 or 3, go to Q24.  
Else, go to Q23.

Q23

INPUT VAR: VOTEHIST

Have you ever voted in a national, state, or local election?

- 1  Yes
- 2  No

EXIT LOGIC: Go to Q24.

Q24

INPUT VAR: PE2YSUCC, PE4YSUCC, PEVTSUCC, PE2YCOST, PE4YCOST, PEVTCOST, PE2YSOCI, PE4YSOCI, PEVTSOCI

The next few questions ask about your views on education beyond high school.

How much do you agree or disagree with the following statements?

	Agree	Somewhat agree	Somewhat disagree	Disagree	Don't know
PE2YSUCC A. Two year community colleges prepare people to be successful	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
PE4YSUCC B. Four year colleges and universities prepare people to be successful	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
PEVTSUCC C. Vocational, technical, or certificate programs prepare people to be successful	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
PE2YCOST D. Two year community colleges are worth the cost	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
PE4YCOST E. Four year colleges and universities are worth the cost	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
PEVTCOST F. Vocational, technical, or certificate programs are worth the cost	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
PE2YSOCI G. Two year community colleges contribute to a strong American workforce	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
PE4YSOCI H. Four year colleges and universities contribute to a strong American workforce	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
PEVTSOCI I. Vocational, technical, or certificate programs contribute to a strong American workforce	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>

EXIT LOGIC: Go to Q25.

Q25

INPUT VAR: HEVALUE

How much do you agree or disagree that a higher education system is good for society?

*Higher education refers to everything from professional certificates or vocational programs to community colleges and four year public/private universities.*

- 1  Strongly agree
- 2  Agree
- 3  Somewhat agree
- 4  Somewhat disagree
- 5  Disagree
- 6  Strongly disagree

EXIT LOGIC: Go to Q26.

Q26

INPUT VAR: FRNDEDUC

How many of your close friends have earned or do you believe will earn a bachelor’s degree at some point in the next five years?

- 1  All of them
- 2  More than half of them
- 3  About half of them
- 4  Less than half of them
- 5  None of them

EXIT LOGIC: Go to Q27.

Q27

INPUT VAR: REST

The next questions ask about your health.

On how many of the past seven days did you get enough sleep so that you felt rested when you woke up?

Select a response from the drop down menu:

Recorded Code	Displayed Option
0	0 days
1	1 day
2	2 days

3	3 days
4	4 days
5	5 days
6	6 days
7	7 days

EXIT LOGIC: Go to Q28.

Q28

INPUT VAR: STRESS

Within the last 12 months, how would you rate the overall level of stress you have experienced?

- 1  No stress
- 2  Less than average stress
- 3  Average stress
- 4  More than average stress
- 5  Tremendous stress

EXIT LOGIC: Go to Q29.

Q29

INPUT VAR: ACTVIG, ACTMOD

On how many days of the past seven did you do the following...

	0. 0 days	1. 1 day	2. 2 days	3. 3 days	4. 4 days	5. 5 days	6. 6 days	7. 7 days
ACTVIG A. Exercise or participate in physical activity for at least 20 minutes that made you sweat and breathe hard, such as basketball, soccer, running, swimming, fast bicycling, fast dancing, or similar aerobic activities	0 <input type="radio"/>	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>	7 <input type="radio"/>
ACTMOD B. Participate in physical activity for at least 30 minutes that did NOT make you sweat and breathe hard, such as fast walking, slow bicycling, skating, pushing a lawn mower, or mopping floors	0 <input type="radio"/>	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>	7 <input type="radio"/>

EXIT LOGIC: Go to Q30.

Q30

INPUT VAR: HEIGHTFT, HEIGHTIN

ITEM INFO: Input for HEIGHTFT and HEIGHTIN is numeric.

What is your height in feet and inches?

HEIGHTFT  feet and HEIGHTIN  inches

IT INFO: If respondent clicks “Next” and HEIGHTFT is not between and including 2 and 7, then display soft check in bold red. **“Feet must be a number between 2 and 7”**. If they chose not to fix the data, they should be able to get past it to the next item.

IT INFO: If respondent clicks “Next” and HEIGHTIN is not between and including 0 and 11, then display soft check in bold red. **“Inches must be a number between 0 and 11”**. If they chose not to fix the data, they should be able to get past it to the next item.

EXIT LOGIC: Go to Q31.

### Q31

INPUT VAR: WEIGHT

ITEM INFO: Text box input is numeric range from 0-999.

What is your current weight in pounds?

pounds

IT INFO: If respondent clicks “Next” and WEIGHTS is not between and including 0 and 999, then display soft check in bold red. **“Please provide a number between 0 and 999.”**. If they chose not to fix the data, they should be able to get past it to the next item.

EXIT LOGIC: If WEIGHT, HEIGHTFT, or HEIGHTIN are MISSING, go to Q31\_2. Else, go to Q32.

### Q31\_2

INPUT VAR: WGHTSELF

How would you describe your weight?

- 1  Very underweight
- 2  Slightly underweight
- 3  About the right weight
- 4  Slightly overweight
- 5  Very overweight

EXIT LOGIC: Go to Q32.

### Q32

INPUT VAR: CONDASTH, CONDDIAB, CONDBP, CONDCHOL, CONDMIGR, CONDSTRS, CONDCONC, CONDINSO

Have you had trouble with or been diagnosed with the following medical conditions?

	1. Yes, within the last 12 months	2. Yes, but not within the last 12 months	3. No
CONDASTH A. Asthma	1○	2○	3○
CONDDIAB B. Diabetes or sugar diabetes	1○	2○	3○
CONDBP C. High blood pressure	1○	2○	3○
CONDCHOL D. High cholesterol	1○	2○	3○
CONDMIGR E. Migraine headache	1○	2○	3○
CONDSTRS F. Repetitive stress injury	1○	2○	3○
CONDCONC G. Difficulty thinking or concentrating	1○	2○	3○
CONDINSO H. Insomnia or trouble sleeping	1○	2○	3○

EXIT LOGIC: Go to Q33.

Q33

INPUT VAR: NOMEDIC

During the past 12 months, was there any time when you needed medical care but did not get it?

- 1○Yes
- 2○No

EXIT LOGIC: Go to Q34.

Q34

INPUT VAR: MHHOPE, MHOVERW, MHEXHST, MHLONEL, MHSAD, MHDEPR

The researchers are interested in general life outcomes, including mental well-being. Remember, no one from Bottom Line, including advisors, will have access to your individual survey answers or know how or if you specifically answered the questions.

Have you ever:

	1. Yes, in the last 2 weeks	2. Yes, in the last 30 days	3. Yes, in the last 12 months	4. No, not in the last 12 months	5. No, never
MHHOPE A. Felt things were hopeless	1○	2○	3○	4○	5○
MHOVERW B. Felt overwhelmed by all you had to do	1○	2○	3○	4○	5○
MHEXST C. Felt exhausted (not from physical activity)	1○	2○	3○	4○	5○
MHLONEL D. Felt very lonely	1○	2○	3○	4○	5○
MHSAD E. Felt very sad	1○	2○	3○	4○	5○
MHDEPR F. Felt so depressed that it was difficult to function	1○	2○	3○	4○	5○

If you or someone you know is in need of help, there are free and confidential services available. For more information and numbers for help hotlines, please visit: <https://www.nami.org/Find-Support/NAMI-HelpLine>

EXIT LOGIC: Go to Q35.

Q35

INPUT VAR: DRGTOB, DRGALC, DRGMARI, DRGCOC, DRGHALLU, DRGMDMA, DRGOTH

The next few questions ask about potentially illegal behavior. Remember, all responses are kept confidential. If this study is to be helpful, it is important that you answer each question thoughtfully and honestly. If you feel you cannot answer a question honestly, we would prefer that you leave it blank.

Within the last 30 days, on how many days did you use...

	1. Never Used	2. Have used but not in the last 30 days	3. 1-2 days	4. 3-5 days	5. 6-9 days	6. 10-19 days	7. 20-29 days	8. Used daily
DRGTOB A. Tobacco products (including cigarettes, e-cigarettes, pipes, cigars)	1○	2○	3○	4○	5○	6○	7○	8○
DRGALC B. Alcohol (beer, wine, liquor)	1○	2○	3○	4○	5○	6○	7○	8○
DRGMARI C. Marijuana (pot, weed, hashish, hash oil)	1○	2○	3○	4○	5○	6○	7○	8○
DRGCOC D. Cocaine (crack, rock, freebase)	1○	2○	3○	4○	5○	6○	7○	8○
DRGHALLU E. Hallucinogens (LSD, PCP)	1○	2○	3○	4○	5○	6○	7○	8○
DRGMDMA F. MDMA (ecstasy)	1○	2○	3○	4○	5○	6○	7○	8○
DRGOTH G. Other illicit or club drugs (crystal meth, downers, heroin, Ketamine, etc.)	1○	2○	3○	4○	5○	6○	7○	8○

EXIT LOGIC: Go to Q36.

Q36

INPUT VAR: RXDRUG

Within the last 12 months, have you taken any prescription drugs that were not prescribed to you?

These could include antidepressants (e.g., Prozac), pain killers (e.g., OxyContin, Vicodin), sedatives (e.g., Xanax), stimulants (e.g., Adderall), or other prescription drugs.

1  Yes

1  No

EXIT LOGIC: If DRGALC = 3 or 4 or 5 or 6 or 7 or 8, go to Q37.  
If DRGALC = MISSING or 1 or 2, go to Q39

### Q37

INPUT VAR: ALCNUM

ITEM INFO: Text box input is numeric range from 0-30.

In the last 30 days, on the days that you drank alcohol, about how many drinks did you usually have?

*By a drink we mean half an ounce of absolute alcohol (e.g., a 12 ounce can or glass of beer or cooler, a 5 ounce glass of wine, or a drink containing 1 shot of liquor).*

Number of alcoholic beverages per day:

EXIT LOGIC: Go to Q38.

### Q38

INPUT VAR: ALCBINGE

ITEM INFO: Text box input is numeric range from 0-30.

On how many days did you have 5 or more drinks on the same occasion during the past 30 days? By occasion, we mean at the same time or within hours of each other.

*By a drink we mean half an ounce of absolute alcohol (e.g., a 12 ounce can or glass of beer or cooler, a 5 ounce glass of wine, or a drink containing 1 shot of liquor).*

Number of days had 5+ alcoholic beverages:

EXIT LOGIC: Go to Q39.

### Q39

INPUT VAR: CREDCARD

ITEM INFO: Text box input is numeric range from 0-25.

We have just a few more questions on finances. Please answer to the best of your ability.

Excluding debit or ATM cards, how many credit cards do you have in your own name that are billed to you? (Only include credit cards for which you are responsible for at least some of the amount owed.)

Number of credit cards:



IT INFO: If respondent clicks “Next” and CREDCARD is not between and including 0 and 25, then display soft check in bold red. **“Please provide a number between 0 and 25.”** If they chose not to fix the data, they should be able to get past it to the next item.

EXIT LOGIC: If CREDCARD = 0 or MISSING, go to Q42.  
Else, go to Q40.

Q40

INPUT VAR: CCCARRY

Do you usually owe an amount that is carried over on your credit cards from month to month?

- 1  Yes
- 2  No

EXIT LOGIC: Go to Q41.

Q41

INPUT VAR: CCDEBT

What is the total amount you owed on your credit card(s) according to your last month's statement(s)?

- 1  \$0 - \$99
- 2  \$100 - \$499
- 3  \$500 - \$1,999
- 4  \$2,000 - \$4,999
- 5  \$5,000 or more
- 6  Don't know

EXIT LOGIC: Go to Q42.

Q42

INPUT VAR: FD250, FD300, FD350, FD400, FD500, FD750, FD1000, FD3000, FD5000, FD10000

Imagine you could choose between getting the amount in Column A right now **OR** waiting 6 months and getting the amount in Column B. Which would you prefer?

*For each row, select one amount from column A **OR** B.*

	Column A – Money I get now	Column B – Money I’ll get in 6 months
FD250	1 <input type="radio"/> \$300 now	2 <input type="radio"/> \$250 in 6 months
FD300	1 <input type="radio"/> \$300 now	2 <input type="radio"/> \$300 in 6 months
FD350	1 <input type="radio"/> \$300 now	2 <input type="radio"/> \$350 in 6 months
FD400	1 <input type="radio"/> \$300 now	2 <input type="radio"/> \$400 in 6 months
FD500	1 <input type="radio"/> \$300 now	2 <input type="radio"/> \$500 in 6 months
FD750	1 <input type="radio"/> \$300 now	2 <input type="radio"/> \$750 in 6 months
FD1000	1 <input type="radio"/> \$300 now	2 <input type="radio"/> \$1,000 in 6 months
FD3000	1 <input type="radio"/> \$300 now	2 <input type="radio"/> \$3,000 in 6 months

FD5000	1 <input type="radio"/> \$300 now	2 <input type="radio"/> \$5,000 in 6 months
FD10000	1 <input type="radio"/> \$300 now	2 <input type="radio"/> \$10,000 in 6 months

EXIT LOGIC: Go to Q43.

### Q43

ENTRY LOGIC: If (DEGVOC = 1, 4, or MISSING) and (DEGASS = 1, 4, or MISSING ) and (DEGBA =1, 4, or MISSING ) and (DEGMA = 1, 4, or MISSING ) and (DEGPHD = 1, 4, or MISSING ) and (DEGMD = 1, 4, or MISSING ) and (DEGJD = 1, 4, or MISSING ), and (DEGOTH = 1, 4, or MISSING) then skip to Q45.

If (DEGVOC = 3) or (DEGASS = 3) or (DEGBA = 3) or (DEGMA = 3) or (DEGPHD = 3) or (DEGMD = 3) or (DEGJD = 3) or (DEGOTH = 3) then skip to Q44.

Else go to Q43.

INPUT VAR: MAJORIND

We'd like to know a little more about your college experiences.

Do you currently have a major or primary area of study you are pursuing?

- 1  Yes
- 2  No

EXIT LOGIC: If MAJORIND = 1 or MISSING, go to Q44.  
If MAJORIND = 2, go to Q45.

### Q44

INPUT VAR: MAJOR, MAJOR\_OS

ITEM INFO: Input for MAJOR\_OS is a text box included with option 12 "Other".

DISPLAY: Display the following sentence if (DEGVOC = 3) or (DEGASS = 3) or (DEGBA = 3) or (DEGMA = 3) or (DEGPHD = 3) or (DEGMD = 3) or (DEGJD = 3) or (DEGOTH = 3)

We'd like to know a little more about your college experiences.

DISPLAY: Display the following for all cases

What do you consider your primary area of study?

- 1  Biological Sciences (zoology, physiology, etc.)
- 2  Business (accounting, marketing, personnel, etc.)
- 3  Communications (journalism, public relations, etc.)
- 4  Education (elementary, special, etc.)
- 5  Engineering, Computer / Information Sciences
- 6  Health Sciences (nursing, occupational therapy, etc.)
- 7  Humanities and Fine Arts (music, religion, English, etc.)

- 8  Physical Sciences and Mathematics (chemistry, etc.)
- 9  Social Sciences (psychology, economics, etc.)
- 10  Sports Sciences and Kinesiology
- 11  Vocational Studies / Apprenticeships (HVAC, cosmetology, etc.)
- 12  Other

EXIT LOGIC: Go to Q45.

Q45

INPUT VAR: LOANAMT

ITEM INFO: Input is a drop down menu.

If you borrowed money to help pay for expenses for education beyond high school, please estimate how much you will owe as of June 30, 2019.

Select a response from the drop down menu.

Recorded Code	Displayed Option
1	I did not borrow money
2	Less than \$3,000
3	\$3,000 - \$5,999
4	\$6,000 - \$8,999
5	\$9,000 - \$11,999
6	\$12,000 - \$15,999
7	\$15,000 - \$17,999
8	\$18,000 - \$20,999
9	\$21,000 - \$23,999
10	\$24,000 - \$26,999
11	\$27,000 - \$29,999
12	\$30,000 - \$32,999
13	\$33,000 - \$35,999
14	\$36,000 or more
15	Don't know

EXIT LOGIC: Go to Q46.

Q46

INPUT VAR: OTHMENT

DISPLAY: Display the following paragraph if BL\_SUCCESS = 0.

During the 2018-19 academic year, did you participate in a formal mentoring program? Do not include informal mentoring you may receive from a faculty member, employer, etc.

DISPLAY: Display the following paragraph if BL\_SUCCESS = 1.

During the 2018-19 academic year, did you participate in a formal mentoring program outside of Bottom Line College Success? Do not include informal mentoring you may have received from a faculty member, employer, etc.

DISPLAY: Display the following for all cases.

1  Yes

2  No

EXIT LOGIC: If OTHMENT = 1 or BLSUCCESS=1, then go to Q47.  
Else if GROUP2019 = 0 OR 1 OR 2, GO TO Q48.

Q47

INPUT VAR: MENTGRAD, MENTMAJOR, MENTCAREER, MENTFIN, MENTSKILL

DISPLAY: Display the following paragraph if BL\_SUCCESS = 0.

How much do you agree or disagree with the following statements? Participation in the mentoring program...

*If you participated in more than one mentoring program, focus on the program that you have been most actively involved with.*

DISPLAY: Display the following paragraph if BL\_SUCCESS = 1.

Now thinking about your experience with the Bottom Line Success Program, how much do you agree or disagree with the following statements? Participation in the Bottom Line Success program...

DISPLAY: Display the following for all cases. If DEGBA = 3, then the language of the grid labels will be different, as specified below the grid. The “Not applicable” column should only be displayed if BL\_SUCCESS = 0.

	1. Strongly agree	2. Agree	3. Somewhat agree	4. Somewhat disagree	5. Disagree	6. Strongly disagree	7. Not applicable
MENTGRAD A. Will help me graduate from college	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>	7 <input type="radio"/>
MENTMAJOR B. Helped me choose a suitable major	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>	7 <input type="radio"/>
MENTCAREER C. Will assist me in my future career	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>	7 <input type="radio"/>
MENTFIN D. Has helped me learn about managing my finances	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>	7 <input type="radio"/>
MENTSKILL E. Has provided me with life skills that I will use after I leave school	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>	6 <input type="radio"/>	7 <input type="radio"/>

DISPLAY: If DEGBA = 3, then display these labels in the above grid as this instead:

MENTGRAD A. Helped me graduate from college
MENTMAJOR B. Helped me choose a suitable major
MENTCAREER C. Has assisted or will assist me in my future career
MENTFIN D. Helped me learn about managing my finances
MENTSKILL E. Provided me with life skills I have used after leaving school

EXIT LOGIC: Go to Q48a.

Q48a

ENTRY LOGIC: If ASK\_RACE = 0, then skip to Q49.

INPUT VAR: ETHNICITY

These last few questions will help us better understand you and your experiences.

Are you of Hispanic, Latino, or Spanish origin?

- 1  Yes
- 2  No

EXIT LOGIC: Go to Q48b.

Q48b

INPUT VAR: WHITE\_SURVEY, BLACK\_SURVEY, NATIVE\_SURVEY, ASIAN\_SURVEY, HAWAIIAN\_SURVEY, OTHER\_SURVEY

ITEM INFO: Input is check boxes for select all.

What is your race?

*Select all that apply.*

- 1  White WHITE\_SURVEY
- 1  Black or African American BLACK\_SURVEY
- 1  American Indian or Alaska Native NATIVE\_SURVEY
- 1  Asian ASIAN\_SURVEY
- 1  Native Hawaiian or Other Pacific Islander HAWAIIAN\_SURVEY
- 1  Other OTHER\_SURVEY

EXIT LOGIC: Go to Q49.

Q49

INPUT VAR: MARSTA

DISPLAY: Display the following sentence if ASK\_RACE = 0.

These last few questions will help us better understand you and your experiences.

DISPLAY: Display the following question for everyone.

Which of the following best describes your current relationship status?

DISPLAY: Display the following response options for everyone.

- 1  Single, never married
- 2  Married
- 3  In a domestic partnership or civil union
- 4  Living with a significant other
- 5  Divorced
- 6  Separated
- 7  Widowed

EXIT LOGIC: Go to Q50.

## Q50

INPUT VAR: CHILDREN

How many children do you have?

- 0  0
- 1  1
- 2  2
- 3  3+

EXIT LOGIC: If GROUP2019 = 0 or 1 or 2 and if INCENTIVE\_ELIG = 1, go to INCENTIVE\_MAIN.  
If GROUP2019 = 0 or 1 or 2 and if INCENTIVE\_ELIG = 2, go to CONTACT\_1.

## Questionnaire: Incentive and Future Contact Information

### INCENTIVE\_MAIN

INPUT VAR: EMAILCNF, EMAILUPD

DISPLAY: This page requires the merged preload EMAIL\_SAMP.

Thank you for participating in our survey.

DISPLAY: If EMAIL\_SAMP is not null, then display the following question and response option for input variable EMAILCNF.

Is this the email where you'd like the gift code sent?

[EMAIL\_SAMP]

- 1  Yes
- 2  No

DISPLAY: If EMAIL\_SAMP is null, then display the following question and response space for input variable EMAILUPD.

Please provide the email address where you'd like us to send the Amazon gift code.

Email:

EXIT LOGIC: If EMAILCNF = 2 or MISSING, go to INCENTIVE\_UPDATE.  
Else, go to CONTACT\_1.

INCENTIVE\_UPDATE

INPUT VAR: EMAILUPD

Please provide the email address where you'd like us to send the Amazon gift code.

Email:

EXIT LOGIC: Go to CONTACT\_1.

CONTACT\_1

INPUT VAR: As displayed in item.

We may contact you in the future to participate in additional surveys. You can decide if you wish to participate in those surveys at that time. We may also contact you in the future if we need to clarify one of your survey responses.

Please provide your contacting information below.

-    -      
PHONE1TYPE  
○ Home ○ Work ○ Cell  
 Phone (primary) PHONE1 Select one.

-    -      
PHONE2TYPE  
○ Home ○ Work ○ Cell  
 Phone (secondary) PHONE2 Select one.

EMAIL1 \_\_\_\_\_ @ \_\_\_\_\_ . \_\_\_\_\_  
 Email (primary)

EMAIL2 \_\_\_\_\_ @ \_\_\_\_\_ . \_\_\_\_\_  
 Email (alternate)

CURADDL1 \_\_\_\_\_  
 Number and Street

CURADDL2 \_\_\_\_\_  
 Apt/Suite/Unit

<u>CURRCITY</u>	<u>CURRST</u>	<u>CURRZIP</u>
City	State	ZIP/Postal Code

EXIT LOGIC: Go to CONTACT\_2.

### CONTACT\_2

INPUT VAR: As displayed in item.

Please provide the name and contact information of someone who is likely to know where you can be reached in case your contact information changes in the near future. We will only contact this person if we are unable to find you.

<u>CNTFNAME</u>	<u>CNTLNAME</u>	
First name	Last name	
<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	
Contact's phone	<u>CNTPHONE</u>	
<u>CNTEMAIL</u>	@	
Email	.	
<u>CNTADD1</u>	<u>CNTADD2</u>	
Number and Street	Apt/Suite/Unit	
<u>CNTCITY</u>	<u>CNTST</u>	<u>CNTZIP</u>
City	State	ZIP/Postal Code

EXIT LOGIC: Go to COMMENT.

## Questionnaire: Comment and Survey Closeout

### COMMENT

INPUT VAR: COMMENT

ITEM INFO: Input is text box.

These are all the questions that we have for you.

Please provide any final comments or thoughts regarding this survey here before submitting your survey on the next screen.

EXIT LOGIC: Go to CLOSE



CLOSE

**Thank you for completing the 2019 Followup to the College Application Process Survey (2019 CAPS)!**

**Please click the “submit survey” below to send us your survey.**

[Display in-line if INCENTIVE\_ELIG = 1 “You can expect to receive your Amazon gift code in the next five business days.”] If you have questions about this study or need assistance, please contact NORC by...

- Calling toll free at 1-877-XXX-XXXX, or
- Sending an email to XXX@norc.org

If you have questions about your rights as a study participant, you may call the NORC Institutional Review Board Administrator, toll free, at 1-866-309-0542.

Submit Survey

## Appendix B. Selected Representative Contacts

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This appendix includes examples of contacts sent to sample members throughout the field period.

Initial invite for treatment cases, letter (Phase 1)

Dear [FNAME] [LNAME],

Please participate in the **2019 Follow-up to the College Application Process Survey (2019 CAPS)**. This survey is for students like you who applied for the Bottom Line College Advising program in 2015. You may remember applying for the program and being enrolled in this research study at the end of high school.

**Your experiences are unique and important!** As someone who has received Bottom Line advising, we want to learn about your experiences since graduating high school and entering college.

**To start the survey** navigate to the URL on your computer, smartphone, or tablet, and then enter your unique PIN.

URL: [https://a4survey.norc.org/2019\\_CAPS\\_survey](https://a4survey.norc.org/2019_CAPS_survey)

PIN: [WEBPIN]

**Your participation will help us** to understand the impact of the Bottom Line program. Findings from the study will help community organizations, schools, and advisors do an even better job of helping future students succeed as they transition from high school into college and beyond. Please take 20 minutes to complete the survey.

**Thank you in advance for your participation!** We look forward to receiving your response. You will also receive this information at the email address we have on file for you.

Sincerely,  
[SIGNATURE]  
Karen Grigorian  
Principal Investigator  
NORC at the University of Chicago

This survey is being conducted by NORC at the University of Chicago with funding from the Carnegie Corporation of New York and the support of Bottom Line. Your participation is completely voluntary and your individual responses will be kept confidential.

**FOR ASSISTANCE COMPLETING THE SURVEY:  
CALL NORC TOLL-FREE AT 1-877-230-8315 OR EMAIL US AT 2019CAPS@NORC.ORG.**

Initial invite for control cases, letter (Phase 1)

Dear [FNAME] [LNAME],

Please participate in the **2019 Follow-up to the College Application Process Survey (2019 CAPS)**. This survey is for students like you who applied for the Bottom Line College Advising program in 2015. You may remember applying for the program and being enrolled in this research study at the end of high school.

**Your experiences are unique and important!** Even though you did not receive Bottom Line advising, we want to continue this research study and learn about your experiences since graduating high school and entering the workforce, college, or wherever your life has taken you.

**We will send you a \$15 Amazon gift code** to thank you for your time when you complete this survey online. To start the survey navigate to the URL on your computer, smartphone, or tablet, and then enter your unique PIN.

URL: [https://a4survey.norc.org/2019\\_CAPS\\_survey](https://a4survey.norc.org/2019_CAPS_survey)

PIN: [WEBPIN]

**Your participation helps us** learn about the critical experiences facing young adults after high school. Findings from the study will help community organizations, schools, and advisors do a better job of helping future students succeed as they transition from high school into college and beyond. Please take 20 minutes to complete the survey.

**Thank you in advance for your participation!** We look forward to receiving your response. You will also receive this information at the email address we have on file for you.

Sincerely,  
[SIGNATURE]  
Karen Grigorian  
Principal Investigator  
NORC at the University of Chicago

This survey is being conducted by NORC at the University of Chicago with funding from the Carnegie Corporation of New York and the support of Bottom Line. Your participation is completely voluntary and your individual responses will be kept confidential.

FOR ASSISTANCE COMPLETING THE SURVEY:  
CALL NORC TOLL-FREE AT 1-877-230-8315 OR EMAIL US AT 2019CAPS@NORC.ORG.

Initial invite for treatment cases, email (Phase 1)

**SUBJECT:** NORC study about Bottom Line program

Dear [FNAME] [LNAME],

Please participate in the **2019 Follow-up to the College Application Process Survey (2019 CAPS)**. This survey is for students like you who applied for the Bottom Line College Advising program in 2015. You may remember applying for the program and being enrolled in this research study at the end of high school.

**Your experiences are unique and important!** As someone who has received Bottom Line advising, we want to learn about your experiences since graduating high school and entering college.

**To start the survey**, click on the link below on your computer, smartphone, or tablet and enter your PIN.

**URL:** [https://a4survey.norc.org/2019\\_CAPS\\_survey](https://a4survey.norc.org/2019_CAPS_survey)

**PIN:** [PIN]

**Your participation will help us** to understand the impact of the Bottom Line program. Findings from the study will help community organizations, schools, and advisors do an even better job of helping future students succeed as they transition from high school into college and beyond. Please take 20 minutes to complete the survey.

**Thank you in advance for your participation!** We look forward to receiving your response.

Sincerely,

Karen Grigorian  
Principal Investigator  
NORC at the University of Chicago

~~~~~  
\* The 2019 Follow-up to the College Application Process Survey (2019 CAPS) is being conducted by NORC at the University of Chicago with funding from the Carnegie Corporation of New York and the support of Bottom Line.

\* The 2019 CAPS is a voluntary survey, but we hope you'll choose to take part. You cannot be replaced by someone else. You were specifically selected because you applied to the Bottom Line College Access program in high school and were enrolled in this research study.

\* You can skip any questions that you don't feel comfortable answering. The survey questions will ask about your education and employment experiences, your health, how you spend your time, and other topics. Your individual responses will be kept confidential.

\* For answers to 2019 CAPS Frequently Asked Questions, please go to <http://www.norc.org/Research/Projects/Pages/bottom-line-2019-follow-up-survey.aspx>.

\* If you have any questions regarding the survey, please contact NORC toll-free at (877) 230-8315 or respond to this email.

\* If you have any questions or concerns about your rights as a research participant, please call the NORC Institutional Review Board Administrator, toll-free, at (866) 309-0542.

Initial invite for control cases, email (Phase 1)

**SUBJECT:** NORC study seeks your participation

Dear [FNAME] [LNAME],

Please participate in the **2019 Follow-up to the College Application Process Survey (2019 CAPS)**. This survey is for students like you who applied for the Bottom Line College Advising program in 2015. You may remember applying for the program and being enrolled in this research study at the end of high school.

**Your experiences are unique and important!** Even though you did not receive Bottom Line advising, we want to continue this research study and learn about your experiences since graduating high school and entering the workforce, college, or wherever your life has taken you.

**We will send you a \$15 Amazon gift code** to thank you for your time when you complete this survey online.

**To start the survey**, click on the link below on your computer, smartphone, or tablet and enter your PIN.

**URL:** [https://a4survey.norc.org/2019\\_CAPS\\_survey](https://a4survey.norc.org/2019_CAPS_survey)

**PIN:** [PIN]

**Your participation helps us** learn about the critical experiences facing young adults after high school. Findings from the study will help community organizations, schools, and advisors do a better job of helping future students succeed as they transition from high school into college and beyond. Please take 20 minutes to complete the survey.

**Thank you in advance for your participation!** We look forward to receiving your response.

Sincerely,

Karen Grigorian  
Principal Investigator  
NORC at the University of Chicago

~~~~~  
\* The 2019 Follow-up to the College Application Process Survey (2019 CAPS) is being conducted by NORC at the University of Chicago with funding from the Carnegie Corporation of New York and the support of Bottom Line.

\* The 2019 CAPS is a voluntary survey, but we hope you'll choose to take part. You cannot be replaced by someone else. You were specifically selected because you applied to the Bottom Line College Access program in high school and were enrolled in this research study.

\* You can skip any questions that you don't feel comfortable answering. The survey questions will ask about your education and employment experiences, your health, how you spend your time, and other topics. Your individual responses will be kept confidential.

\* You can expect your incentive to be delivered to the email you provide at the end of the survey in approximately 5 business days.

\* For answers to 2019 CAPS Frequently Asked Questions, please go to <http://www.norc.org/Research/Projects/Pages/bottom-line-2019-follow-up-survey.aspx>.

\* If you have any questions regarding the survey, please contact NORC toll-free at (877) 230-8315 or respond to this email.

\* If you have any questions or concerns about your rights as a research participant, please call the NORC Institutional Review Board Administrator, toll-free, at (866) 309-0542.

Initial invite message, SMS (Phase 1)

**Group: TREATMENT**

The 2019 CAPS survey has started! Help Bottom Line improve their college advising and mentoring programs. Click here: [https://a4survey.norc.org/2019\\_CAPS\\_survey](https://a4survey.norc.org/2019_CAPS_survey). Your PIN is \$PIN. Questions? NORC.org is conducting this survey. Call us at 877-230-8315 or email 2019CAPS@norc.org. Thank you!

**Group: CONTROL**

The 2019 CAPS survey has started! It takes about 20 minutes. After we receive your eligible survey, we'll send you a \$15 Amazon gift code. Click here: [https://a4survey.norc.org/2019\\_CAPS\\_survey](https://a4survey.norc.org/2019_CAPS_survey). Your PIN is \$PIN. Questions? NORC.org is conducting this survey. Call us at 877-230-8315 or email 2019CAPS@norc.org. Thank you!

Incentive offer to Treatment, email (Phase 2)

**SUBJECT:** Don't hit snooze on us!

In the time you hit snooze on your alarm once - or maybe twice - **you could earn a [\$10 or \$15] Amazon gift code** by completing our survey!

Dear [FNAME] [LNAME],

**The 2019 Follow-up to the College Application Process Survey (2019 CAPS)** continues the research study you enrolled in at the end of high school when you applied for the Bottom Line program. ***Whether you [continued with college or not/went to college or not], you are important and we want to hear from you!***

**Click on or navigate to the link below** on your computer, smartphone, or tablet and enter your PIN to access the 2019 CAPS:

URL: [https://a4survey.norc.org/2019\\_CAPS\\_survey](https://a4survey.norc.org/2019_CAPS_survey)

PIN: [PIN]

**Only you can tell us about your experiences since graduating high school.** Your participation helps us learn what young adults like you face. By completing the survey you contribute to a research effort focused on helping individuals like you succeed.

**Don't sleep on this opportunity to contribute to research and earn a [\$10 or \$15] Amazon gift code!**

With appreciation,

Karen Grigorian  
Principal Investigator  
NORC at the University of Chicago

~~~~~  
\* The 2019 Follow-up to the College Application Process Survey (2019 CAPS) is being conducted by NORC at the University of Chicago with funding from the Carnegie Corporation of New York and the support of Bottom Line.

\* The 2019 CAPS is a voluntary, 20 minute survey, and we hope you'll choose to take part. You cannot be replaced by someone else. You were specifically selected because you applied to the Bottom Line College Access program in high school and were enrolled in this research study.

\* You can skip any questions that you don't feel comfortable answering. The survey questions will ask about your education and employment experiences, your health, how you spend your time, and other topics. Your individual responses will be kept confidential.

\* You can expect your incentive to be delivered to the email you provide at the end of the survey in approximately 5 business days.

\* For answers to 2019 CAPS Frequently Asked Questions, please go to <http://www.norc.org/Research/Projects/Pages/bottom-line-2019-follow-up-survey.aspx>.

\* If you have any questions regarding the survey, please contact NORC toll-free at (877) 230-8315 or respond to this email.

\* If you have any questions or concerns about your rights as a research participant, please call the NORC Institutional Review Board Administrator, toll-free, at (866) 309-0542.



Incentive offer to Treatment, SMS (Phase 2)

Please help Bottom Line by completing the 2019 CAPS survey. We will send you a [INCENT\_AMT] Amazon gift code when we receive your eligible survey. The survey is here: [https://a4survey.norc.org/2019\\_CAPS\\_survey](https://a4survey.norc.org/2019_CAPS_survey). Your PIN is [SPIN]. Questions? Call NORC at 877-230-8315 or email [2019CAPS@norc.org](mailto:2019CAPS@norc.org). Thank you!

“No wrong answers” prompting message to any nonrespondent, email (Phase 2)

**SUBJECT:** Some things in life are hard, getting [\$\$] is not!

[FNAME] [LNAME],

Things that are hard: applying for loans, taking exams, and interviewing for jobs.

What isn't hard...doing our research survey! There are no wrong answers AND you get a [\$\$] Amazon gift code.

Access the 2019 CAPS survey at the following link, using your PIN:

Survey Link: [https://a4survey.norc.org/2019\\_CAPS\\_survey](https://a4survey.norc.org/2019_CAPS_survey)

PIN: [SPIN]

Your thoughts and experiences matter. We want to hear from you!

Shana Brown  
CAPS Study Director  
NORC at the University of Chicago

~~~~~

*P.S. The gift code will be sent to the email you provide at the end of the survey in ~ 5 business days.*

*P.P.S. NORC is a non-profit, non-partisan organization committed to conducting research in the public's interest. Please help us by participating.*

“Your participation matters” prompting message to any nonrespondent, SMS (Phase 2)

[FNAME], your participation matters. Please complete the 2019 CAPS survey and receive [INCENT\_AMT] to Amazon. Login with your PIN: [\$PIN] to start: [https://a4survey.norc.org/2019\\_CAPS\\_survey](https://a4survey.norc.org/2019_CAPS_survey). Email us at 2019CAPS@norc.org with any questions.

Increased incentive offer for low responding groups, email (Phase 3)

**SUBJECT:** Get [INCENT\_AMT] and help Bottom Line

[FNAME] [LNAME],

**We need more people like you - who attended high school in the [Program location] area - to participate in the 2019 CAPS.** Because your responses are crucial to our goal of conducting representative social science research, **I have authorized an increased Amazon gift code of [INCENT\_AMT] for you if you complete the survey.**

The 2019 CAPS takes just 20 minutes to complete and is confidential. Your contribution will help improve college mentoring programs for high school seniors who would benefit from it the most.

Start the survey at this link and enter your PIN:

Survey Link: [https://a4survey.norc.org/2019\\_CAPS\\_survey](https://a4survey.norc.org/2019_CAPS_survey)

PIN: [SPIN]

Thank you in advance!

Shana Brown  
CAPS Study Director  
NORC at the University of Chicago

P.S. The gift code will be sent to the email you provide at the end of the survey in ~ 5 business days.

“High School” prompting message for any nonrespondents, SMS (Phase 3)

Represent others who attended [HIGH SCHOOL NAME] and get [INCENT\_AMT] to Amazon.  
Complete the 2019 CAPS: [https://a4survey.norc.org/2019\\_CAPS\\_survey](https://a4survey.norc.org/2019_CAPS_survey). Your PIN is [PIN]

“Represent others” prompting message for any nonrespondents, email (Phase 3)

**SUBJECT:** Represent others who attended [HIGH SCHOOL]

[FNAME] [LNAME],

**Help us improve mentoring programs for future students from schools like [HIGH SCHOOL].** We can only do this if more people like you let us know about your experiences in the years since you graduated.

The 2019 CAPS is confidential and takes just 20 minutes. **We will send you [INCENT\_AMT] to Amazon when you complete the survey.**

Start the survey at this link and enter your PIN:

Survey Link: [https://a4survey.norc.org/2019\\_CAPS\\_survey](https://a4survey.norc.org/2019_CAPS_survey)

PIN: [SPIN]

Thank you in advance!

Shana Brown  
CAPS Study Director  
NORC at the University of Chicago

P.S. The gift code will be sent to the email you provide at the end of the survey in ~ 5 business days.

“Claim your incentive” prompting message for any nonrespondents, SMS (Phase 3)

Don't miss the opportunity to claim your [INCENT\_AMT] Amazon gift code. Help us understand what people do in the years after high school. Complete the 2019 CAPS:  
[https://a4survey.norc.org/2019\\_CAPS\\_survey](https://a4survey.norc.org/2019_CAPS_survey). Your PIN is [PIN]

“Time is money” prompting message for any nonrespondents, email (Phase 3)

**SUBJECT:** Time is money!

Hi [FNAME]:

The summer can be a busy time, but the 2019 CAPS only takes 20 minutes. **Take the time to complete the survey and we will send you [\$\$] to Amazon!** How you spend it is up to you.

Survey Link: [https://a4survey.norc.org/2019\\_CAPS\\_survey](https://a4survey.norc.org/2019_CAPS_survey)

PIN: [SPIN]

Your thoughts and experiences matter. We want to hear from you!

Karen Grigorian  
Principal Investigator  
NORC at the University of Chicago

~~~~~

*P.S. The gift code will be sent to the email you provide at the end of the survey in ~ 5 business days.*

*P.P.S. NORC is a non-profit, non-partisan organization committed to conducting research in the public's interest. Please help us by participating.*



Last week message to nonrespondents, email (Phase 3)

**SUBJECT:** Last chance to participate!

[FNAME],

**Only a couple days left to complete the 2019 CAPS!** This is the last chance for you to get a [INCENT\_AMT] Amazon credit for completing the survey. Please participate and help others in the community where you attended high school.

The deadline is Sunday, July 14. Complete today!

Survey Link: [https://a4survey.norc.org/2019\\_CAPS\\_survey](https://a4survey.norc.org/2019_CAPS_survey)

PIN: [\$PIN]

Shana Brown  
CAPS Study Director  
NORC at the University of Chicago

~~~~~

*\* The [INCENT\_AMT] gift code will be sent to the email you provide at the end of the survey in ~ 5 business days.*

Last day week to nonrespondents, SMS (Phase 3)

We're waiting to hear from you, [FNAME]! This is the final week to [participate in the 2019 CAPS // help Bottom Line] and claim your [INCENT\_AMT] to Amazon!  
[https://a4survey.norc.org/2019\\_CAPS\\_survey](https://a4survey.norc.org/2019_CAPS_survey). Your PIN is [\$PIN]

Last day message to nonrespondents, email (Phase 3)

**SUBJECT:** Final day to participate and get [INCENT\_AMT]

[FNAME],

**Today is the last day to participate in the 2019 CAPS!** Don't miss out on a [INCENT\_AMT] Amazon credit for completing the survey and contributing to this research.

Please complete today before time runs out.

Survey Link: [https://a4survey.norc.org/2019\\_CAPS\\_survey](https://a4survey.norc.org/2019_CAPS_survey)

PIN: [\$PIN]

Thank you!

Shana Brown  
CAPS Study Director  
NORC at the University of Chicago

~~~~~

*\* The [INCENT\_AMT] gift code will be sent to the email you provide at the end of the survey in ~ 5 business days.*

Last day message to nonrespondents, SMS (Phase 3)

Today is the last day to complete the 2019 CAPS! Don't miss out on this opportunity to receive a [INCENT\_AMT] Amazon credit. Survey link: [https://a4survey.norc.org/2019\\_CAPS\\_survey](https://a4survey.norc.org/2019_CAPS_survey). Your PIN is [\$PIN]

## Appendix C. Raffle Language: \$100 and \$300 Offers

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Raffle language for \$100 Offer, initial email

**SUBJECT:** Time is running short, please help out!

Dear [FNAME] [LNAME],

**The 2019 CAPS survey will end soon!** By participating in this research you help us understand the best way to serve young adults in your community. Plus, **you get a [CURRENTLY ASSIGNED \$ AMOUNT] Amazon gift code** when you complete the survey.

Access the 2019 CAPS survey at this secure link and enter your PIN:

[https://a4survey.norc.org/2019\\_CAPS\\_survey](https://a4survey.norc.org/2019_CAPS_survey)

PIN: [SPIN]

**You also have a chance for an additional \$100 Amazon gift code:** When you complete the survey between noon (ET) on 5/21 and 11:59 pm (ET) on 5/27, you will be entered into a random drawing for \$100 on 5/28.

Thank you, in advance,

Karen Grigorian  
CAPS Principal Investigator  
NORC at the University of Chicago  
*A non-profit, non-partisan organization*

~~~~~

*\* NORC is a 501(c)(3) organization committed to conducting research in the public's interest. Please help us help the community by participating. Visit [norc.org](http://norc.org) to learn more.*

*\* The [CURRENTLY ASSIGNED \$ AMOUNT] gift code will be sent to the email you provide at the end of the survey in ~5 business days. We will notify the drawing winner by the end of the day 5/29.*

*\* To enter the drawing if you are unable to complete the survey, please call us at (877) 230-8315 by 5 pm (ET) on 5/27.*

Raffle language for \$300 Offer, initial email

**SUBJECT:** Eligible for \$300 drawing if you complete survey before 7/4

Dear [FNAME] [LNAME],

**Complete the 2019 CAPS before July 4<sup>th</sup> and be entered into a drawing for a \$300 Amazon gift code!** This is in addition to the [CURRENTLY ASSIGNED \$ AMOUNT] you're guaranteed to receive when you do the survey.

**You were specifically chosen to complete the 2019 CAPS and your response is important!** Access the survey at this secure link and enter your PIN:

[https://a4survey.norc.org/2019\\_CAPS\\_survey](https://a4survey.norc.org/2019_CAPS_survey)

PIN: [SPIN]

When you complete the survey between noon (ET) on 6/25 and 11:59 pm (ET) on 7/3, you will be entered into a random drawing for \$300 on 7/5.

Thank you, in advance,

Karen Grigorian  
CAPS Principal Investigator  
NORC at the University of Chicago  
*A non-profit, non-partisan organization*

~~~~~  
*\* The [CURRENTLY ASSIGNED \$ AMOUNT] gift code will be sent to the email you provide at the end of the survey in ~5 business days. We will notify the drawing winner by the end of the day 7/5.*

*\* To enter the drawing if you are unable to complete the survey, please call us at (877) 230-8315 by 5 pm (ET) on 7/3.*