

Gemini Redesign Project High Level Timeline

April 6, 2017

Overview

The Gemini project was started in 2009 to devise a plan for redesigning the survey. In July 2013, a redesign plan was approved. Over the next 10 years the redesign plan will be further detailed and tested, leading to implementation. The major milestones of the timeline are listed in this document.

The timeline makes assumptions regarding the availability of funding. Adjustments to the timeline may be required based on test results. Tests are all designed to be iterative with each test building on its predecessor.

Major Milestones

2013 Web Diary Test

A test of a web-based diary to collect expenditures was fielded in 2013. The test was designed to evaluate the feasibility and impact of using a web diary to collect CE diary expenditures. Lessons learned from this test have been incorporated into the Individual Diaries test (2014) and will be incorporated into the Proof-of-Concept test (2015).

2014 Individual Diaries Test

This study tested the feasibility and impact of using both individual diaries and multiple modes to collect CE diary expenditures and was fielded in late 2014. Results from the Individual Diaries test were used to build the Proof-of-Concept test (2015).

2015 Expenditure categories

Based on a combination of cognitive testing, expert judgment, and requirements, the final number of expenditure categories was decided and made available. The minimum number of expenditure categories required in the redesign is 126, reduced from current survey level of over 900.

2015 Proof-of-Concept Test

A small-scale Proof-of-Concept (POC) test was fielded with a main objectives to validate the single-sample design, consisting of 2 personal visits with a diary week in between. The test also provided information on the effectiveness of incentives, length of interviews, and respondents' willingness and ability to complete each component of the interview.

2015 Incentives Field Test

This study tested and assessed alternative incentive structures and amounts for the CE survey redesign. The results will be used to inform the incentive structure of the Large-Scale Feasibility Test.

- 2016 Recall and Records Interview Global Questions Test
- This study involves cognitively testing global questions for the recall and records interview expenditure categories recommended for aggregation. The findings will be used to make recommendations for the Recall and Records interviews for the Large-Scale Feasibility Test.
- 2016 Online Diary Improvement Project
- The goal of this project is to develop a CE online diary for use in the Online Diary Implementation test and the Large-Scale Feasibility Test. The online diary will be adaptable, well documented, and created in a common programming language.
- 2017 Questionnaire Revisions
- The last major biennial questionnaire revisions of the current surveys will be in 2017. This will free up systems and program office staff from work normally conducted for 2019 and 2021 revisions.
- 2017 Online Diary Implementation Test
- The online diary developed in the Online Diary Improvement Project will be tested in a small field test to collect diary expenditures. The results will inform CE's future redesign efforts.
- 2017 Large-Scale Feasibility Test
- The Large-Scale Feasibility test (LSF) will be designed to closely reflect all of the components of redesign; incorporating lessons learned from the web and individual diaries test, the proof-of-concept test, and cognitive lab studies and additional research. Findings from the test will be used in planning the dress rehearsal.
- TBD Dress Rehearsal
- There will be a dress rehearsal prior to the planned implementation date. This will be conducted as a dry-run of all procedures and systems developed for implementation. The end of the dress rehearsal test is designed to roll into full production implementation with the expectation that any required changes based on the LSF will have been previously implemented. The dress rehearsal will also provide a comparison to the production data so that any breaks in data series resulting from the redesign can be identified and documented.
- TBD Implementation
- Full implementation of the redesign will be dependent on funding availability and test results. Some of the previous dates may also adjust based on levels of funding.
- TBD Microdata and Publications
- Final systems work will be conducted following the implementation for Microdata and Publications. The first release of the redesigned production data will be expected the year following implementation.