

CASIC Survey Management Challenges

Co-Chairs: Karen Davis, RTI and Jane Shepherd, Westat

This panel provides a venue for presenting and discussing the management and administrative challenges in today's CAI environment.

The session is divided into two topic areas and within each of these topics, the panelists and a moderator address current issues, approaches taken, and lessons learned.

The approach is to discuss the techniques used in different organizations to address key management issues, participate in a discussion of these issues, and have an opportunity to ask the panelists about effective approaches to common situations

Management challenges related to Predicting Technology Costs

This panel discusses current challenges for survey organizations and project managers related to predicting technology costs for survey projects. Some key topics:

- With the recent advances in technology, including mobile devices, personal devices and sensors, how do survey projects plan to utilize these new technologies, and plan for the costs associated with switching from current tools/processes to the new technologies?
- Addressing the management challenges and balancing needs of survey sponsors and stakeholders

Management challenges related to Predicting Technology Costs

Moderator: Jane Shepherd, Vice President, Westat

Panelists:

- Gina Cheung – Chief Technology Officer, Survey Research Operations, Survey Research Center, University of Michigan
- Ananth Koppikar, Associate Director, Information Services Department, Mathematica
- Ken Robertson, Assistant Commissioner in the Office of Employment and Unemployment Statistics, BLS
- Stacy Stonich, Director of Information Technology Project Services, NORC



University of Michigan Survey Research Center
Gina Cheung

Problems or Solutions??

Technological advancements and trends
in our survey world

1. BYOD
2. Big Data
3. Security
4. Visual Computing

Keys to move forward

- **Identify** technology trends that can bring innovation, and determine how they may affect an organization and its operations.
- **Apply** technology trends that can help productivity, efficiency and cost savings through the process.
- **Integrate** new technologies into existing infrastructure and demonstrate the positive outcomes on operational efficiency

Management challenges related to predicting technology costs

Presentation at the FedCASIC Conference

March, 2015

Ananth Koppikar,
Mathematica policy Research

Amara's Law

The late Roy Amara was a scientist and president of the Institute for the Future, a Californian think tank, and his Law encourages us to think long term about new technology (and this is easier said than done):

"We tend to overestimate the effect of a technology in the short run and underestimate the effect in the long run."

Challenges

- Predicting the future technology landscape – part science and part art;
 - Keeping abreast of current technology landscape (what's bleeding edge, what's leading edge, what's “so last week”, what's “so last year”, and what's “old” and what's “ancient”)
 - ❖ Innovations outside our industry that could impact us; e.g. wearables (potential for real-time data collection of potential health indicators);
 - Reading the tea leaves (in 2010, did you predict that Facebook would have over 1.2 Billion users by 2015?)
- Costs are not restricted just to software and hardware costs
 - Time and resources needed to identify and analyze business needs / requirements & constraints
 - Time and resources needed to evaluate technology options
 - Cost of adoption – process changes vs. customization; training of users and technical resources; parallel systems;
- IT Resource Costs: Recruitment; Training; Retention; Specialization leads to high costs; Competing for resources with technology-centric industries;

Approaches

- What are the governmental agencies forecasting regarding technology trends and needs?
- What are parallel industries (e.g. Market Research companies) doing? What does Gartner predict?
- How could Cloud based solutions evolve to support broader data collection needs?
- Experience and a knowledge base of costs (cost history database) helps a great deal with predicting costs;

Management Challenges Predicting IT Costs

FEDCASIC
March 2015

Ken Robertson
Assistant Commissioner
Industry Employment Statistics



Predicting Tech Costs

- How much will that project cost?
 - ▶ And how much time will it take?
- Lessons from Non-IT projects
 - ▶ Project Planning
 - ▶ Research
 - ▶ Opportunity costs
- IT projects
 - ▶ Inception Phase – deliver \$/time estimate

Predicting Tech Costs

- Right tool, right approach, right time?
 - ▶ Hammer/nail?
 - ▶ New tools – steep \$ curve up / down?
- Past systems development experience
 - ▶ Some slower than expected
 - ▶ Some faster
- Current efforts
 - ▶ Agile process

Contact Information

Ken Robertson

Assistant Commissioner

Office of Industry Employment Statistics

202-691-5440

Robertson.Ken@bls.gov



www.bls.gov

Survey Management Challenges



NORC

at the UNIVERSITY *of* CHICAGO

Challenges Related to Predicting Costs

- People
- Product
- Process

Challenges Related to Predicting Costs - People

- Introduction of new technologies & APIs
- Staff have to be ok with frustration factor of working with the unknown
- Doing things others haven't tried yet
- No lessons to learn from
- Road bumps are hard to cost

Challenges Related to Predicting Costs - Product

- Hard keeping up with all the new technologies and devices entering the market
- Technology changes rapidly API changes can break things when you least expect it
- Rapid introduction of wearables
- Fast pace makes it hard to compare



Challenges Related to Predicting Costs - Process

- Introduction of new technologies
 - Adaptation of processes
- Not a lot of budget for learning new technologies
- Lots of unknowns make it hard to accurately cost

Thank You!



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 insight for informed decisions™



Discussion