

STATCOM@UMICH

**Procedures Handbook
Revision 1.0**

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1.0 INTRODUCTION

Statistics in the Community at the University of Michigan (STATCOM@UMICH) is a community outreach organization within the Department of Statistics. Graduate students participating in STATCOM volunteer their time to provide free statistical consulting to governmental and nonprofit groups. This could include schools, government agencies, health centers, homeless shelters, advocacy groups, libraries, adult learning centers, and other agencies and organizations. STATCOM is directed and staffed primarily by graduate students.

Graduate students who participate in STATCOM receive many benefits. The ability to effectively express statistical concepts to others is a crucial skill that will benefit students throughout their careers. STATCOM consultants enhance their communication skills as they discuss statistical concepts and results with individuals of varied backgrounds and interests. Student contributors to STATCOM work as part of a team to address real problems faced by local organizations. This activity supplements the solid academic training acquired in the classroom. STATCOM's team-based paradigm supplements a cooperative learning environment. STATCOM consultants also receive intangible but real satisfaction as they reach out to others and share their knowledge and skills. In addition, STATCOM provides yet another link between Purdue University and the surrounding community. This provides long-term benefits that impact both present and future students at Purdue.

2.0 DETAILS OF CLIENT INTERACTIONS

2.1 Obtaining Clients

It is important to advertise the services that are available to potential clients. STATCOM does this through a variety of means including articles published in the Biostatistics Department's annual newsletter, the STATCOM website (<http://www.sph.umich.edu/biostat/statcom.html>), brochures, listings in community publications, and presentations at professional/public meetings.

New clients can be obtained through a variety means. These could include contacting old clients, presentations at meetings of civic organizations, personal contacts through STATCOM members, and references from faculty and staff.

2.2 Initial Contacts with Clients

To apply for service from STATCOM, potential clients either e-mail mrelliot@umich.edu or call the STATCOM phone number. This message is received by the director, the faculty advisor, and student advisor. The director will reply to the client, acknowledging the message. If time is of the essence, the director will appoint a team leader and organize a team immediately. Otherwise, the initial contact will be discussed in an e-mail sent to all statistics graduate students or at the next monthly staff meeting, and a team will be organized at that time.

2.3 Initial Procedures

2.3.1 Team Creation

First, an email to students is sent to those who qualify to be a team leader asking who is interested in leading the project. If multiple people respond, the director or associate director will choose a team leader. Next, an email to all students in the biostatistics department and others on the mailing list is sent out asking who is interested in working on the project. From these volunteers, a team is formed. Efforts will be made to ensure there is at least one other person with experience on the team to assist the team leader when needed. The director or associate director will meet with this team to explain the project and prepare the members before the initial meeting.

2.3.2 Initial and Follow-up Meetings

The initial meeting between a client and members of STATCOM may take place at the Statistics Department or at a location provided by the client. Clients based outside the greater Lafayette area are strongly encouraged to come to the Statistics Department

for all meetings. The director or associate director, the team leader, and the other team members will attend initial meetings. These meetings should be professional. STATCOM members must be punctual and dress appropriately in business casual attire. The initial meeting handout will be completed and given to the client at this time. A follow-up contact thanking the client should be made one week after the initial meeting by the team leader. Follow-up meetings with the client will be conducted as needed in a fashion similar to the initial meetings.

2.4 Expectations

One important purpose of the initial meeting is to make clear to the client what they can and cannot expect from STATCOM. STATCOM's primary goals are to assist with the design of studies and with data management, cleaning, and analysis. In general, STATCOM will not be involved in data collection or entry. Deidentification of all individuals should be done before STATCOM receives the data. Members of STATCOM will not be required to educate clients on the statistical procedures or software used for the analysis. A reasonable timetable will be discussed and agreed upon at the initial meeting with the client. When developing a timeline, consideration should be given to student schedules and client needs. STATCOM strictly abides by current statistical ethical guidelines.

2.5 Work Done by Consultants

2.5.1 Analysis

Work on each project is directed by the team leader and requires the participation of all team members. Each team should consist of members with varying degrees of experience. This allows STATCOM to train new consultants while ensuring quality work. As graduate students choose to participate in STATCOM with the hope of gaining valuable experience, it is important that no team member is excluded, regardless of experience.

Both the analysis and the final report should be kept as simple as possible, taking into consideration the client's objectives and background. Projects should require a reasonable amount of time each week. If any team member is unable to commit sufficient time to a project, he or she should contact the project manager as soon as possible.

2.5.3 Final Written Reports

At the conclusion of STATCOM's role, the team will provide a written report that summarizes the work that has been done, details the team's findings, and gives interpretation of the results and

recommendations for future study or action. All recommendations should be presented as suggestions, and it should be made clear that the client bears all responsibility for any action or decision made based on STATCOM's findings. The scope of the report should be limited only to the work that was agreed upon. The intended audience for the written report is the client organization, keeping in mind that others, including the general public, may read the report as well. The team leader is responsible for directing and supervising the creation of this document.

2.5.3.1 Format and Content

The format conventions are recommended as follows:

- Use the font Times New Roman, 12 points, for all text except the report title lines.
- Use the font Times New Roman, 10 points, for charts and chart legends.
- Leave one blank line between sections.
- Use boldface for section titles.
- If an acronym is used, indicate the full meaning when it is first introduced. For example, "Statistics in the Community (STATCOM)".
- Insert one space after a comma and semi-colon, two spaces after a period or colon.
- Use complete sentences. Use articles such as "the," "a," and "an" to make sentences more readable.
- Explain any technical terms that the reader must know to understand the report.
- The report will be written in a professional manner.

2.5.3.2 Submission and Distribution

After the completion of the final report, the team leader submits the report draft to the project manager. If there are major revisions needed, i.e. alternative statistical analysis, the project manager will return the report to the team leader. When the project manager considers the report ready, it is sent to the director, associate director, and advisors for final approval. A final copy will be stored in the appropriate folder in the STATCOM shared directory. The team leader will submit the final report to the client. Editing time should be taken into account when setting the initial timeline.

2.6 Final Procedures

2.6.1 Final Meeting

A final meeting should take place after submission of the final report in order to answer any client questions and to summarize the report in the form of a presentation. If the client requests any further analysis taking less than 5 hours of work, the team will continue working on the project and edit the final report in accordance with the client's wishes. If further analysis will take more than 5 hours of work, or a separate analysis is requested, a new project will be formed. If a final meeting cannot take place, the team leader should contact the client by email or phone to answer any questions the client may have.

3.0 ORGANIZATIONAL STRUCTURE

3.1 Volunteer Organization

As a volunteer organization, STATCOM relies on consultants working in their available time, but this work should not interfere with studies. If a STATCOM team member begins to feel overwhelmed with his or her involvement, they should inform their immediate leader and seek a reduced assignment rather than neglecting clients or falling behind in his or her studies. Although volunteer work is valuable and satisfying, coursework should remain the priority of STATCOM consultants.

3.2 Role of STATCOM

STATCOM is one of the Department of Statistics' statistical consulting services and has a unique place in the consulting community at Purdue. STATCOM serves governmental and nonprofit organizations free of charge.

3.3 Positions, Qualifications, and Responsibilities

STATCOM offers a variety of positions for service and involvement. Each position has unique responsibilities and qualifications. The responsibilities for each position will be re-evaluated as STATCOM's needs change.

3.3.1 Director

3.3.1.1 The director is a student who oversees the operations of STATCOM. He or she gives informative talks and discussion to interested parties (e.g. Vice Provost of Engagement). The director also works with the associate director to assign new clients to teams of consultants and serves as a contact for existing clients. Any communication between consultants and clients goes through the director or associate director to ensure quality and appropriateness of service.

3.3.1.2 The director must have previous experience with STATCOM and at least two semesters of consulting experience, possess a computer account with the Department of Statistics, and be able to make a commitment of two semesters as director, followed by one semester as student advisor.

3.3.2 Faculty Advisor

3.3.2.1 The faculty advisor to STATCOM is a faculty or staff member who provides support and guidance to the student-run organization. The faculty advisor ensures continuity between academic years and appropriateness of service to clients.

3.3.2.2 The faculty advisor to STATCOM should have consulting experience, and selection of the faculty advisor must be approved by student officers.

3.3.3 Project Manager

3.3.3.1 The STATCOM project managers are students who provide advice to team members and oversee the progress of all active teams. The project manager is also in charge of addressing statistical and non-statistical issues that may arise for a given project, for example, if a team is falling behind in the timeline. He or she will update the director and associate director of the progress of the teams at officer meetings. Typically, two students will hold this position.

3.3.3.2 The project manager must have previous experience with STATCOM and possess a computer account with the Department of Statistics. He or she must be able to commit one semester to this position.

3.3.4 Team Leader

For each project, the director and associate director will form a team of consultants. Each team will be headed by a team leader, an experienced consultant who is responsible for maintaining progress on the project. The rest of the team will consist of two or more other students, some experienced and some novice consultants.

3.3.5 Team Members

Consultants participating in STATCOM volunteer for team positions on projects and should decide how many hours a week they are willing to contribute to STATCOM by coordinating with team leaders. The team as a whole is responsible for working together to complete the analysis and write the final report.

3.3.9 Active Members

An active member in STATCOM is one who attends at least one general monthly meeting per semester and has signed a confidentiality form. If a member can not attend any of the general monthly meetings and has still been involved in at least one project, he or she should contact the associate director to keep their status active.

3.4 Meetings

3.4.1 General Monthly Meetings

STATCOM consultants meet in regular monthly meetings to discuss ongoing projects. These meetings are helpful in the success of STATCOM by facilitating interaction among teams. For this reason, members are expected to attend. Monthly meetings also feature student presentations where topics relevant to STATCOM are discussed.

3.4.2 Officer Meetings

Officers include the director, associate director, student advisor, project managers, P-12 director, and others working on administrative projects. Bi-monthly officer meetings (twice a month) are held to discuss managerial concerns of STATCOM. These things include timelines of projects, current grant applications, funding opportunities, and other administrative duties.

3.5 End of Semester Activities

3.5.1 Continuing Teams

If a team is continuing work on a project at the end of the semester, the project manager should meet with the team to assess whether any personnel changes need to be made. For example, if team members are graduating, new team members may need to be added to complete the project on time.

3.5.2 Semester Meeting

An end of the semester meeting should take place to discuss the activities of the past semester. Officers go over the satisfaction surveys returned by clients to see if there is anything in the STATCOM process that needs to be changed, i.e. clients responded they would like more updates during the analysis. Officers should also review the Procedures Handbook to assess if any changes need to be made to the organizational structure, i.e. a new secretary position is needed.

4.0 LEGAL ISSUES

4.1 Client Confidentiality

4.1.1 Policy

To ensure uninhibited communication between the client and STATCOM, consultants must abide by a client confidentiality policy. All consultants must sign a client confidentiality agreement, which states that they will not discuss the project with any person outside of STATCOM without the client's consent. It is important for STATCOM consultants to be able to demonstrate proficiency and experience when interviewing for jobs. Consultants may discuss aspects of projects outside of STATCOM, as long as no information that could be used to identify the client is given.

4.1.2 Discussing Projects on Vitas, Résumés, Interviews, etc.

If a client has given permission for STATCOM to discuss the project publicly, a consultant can discuss appropriate details of the project freely.

However, if this permission has not been granted, a consultant must not disclose specific information that could reveal the client or the specific project. For example, a consultant may state that he or she “helped a school district evaluate the impact of the state funding formula on their organization” or “led a team of four students who helped a local youth service group prepare and analyze a survey to study the effectiveness of one of their programs.”

This is a very sensitive issue. Consultants must show professionalism and use sound judgment.

4.3 Vehicle Use

4.3.1 Travel Arrangements

If STATCOM consultants choose to arrange a meeting at a client's location, the consultants will carpool or arrange their own transportation. Clients outside of Washtenaw County will be expected to travel to Ann Arbor to meet with STATCOM consultants. Exceptions to this policy may be granted with the mutual consent of the directors and the faculty advisor of STATCOM.

4.3.2 Insurance

The driver of any vehicle transporting STATCOM personnel certifies that he or she has current liability insurance coverage and medical insurance coverage on passengers. Operators of vehicles used for STATCOM business agree to exercise prudence and caution.