# Survey Research Operations

## Monthly Project Report

### Sponsored Projects

## March 2017

## Sponsored Projects

*(ABCD)  Adolescent Brain Cognitive Development*
*(A-STARRS LS)  Army Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study*
*(DMACS)  Detroit Metropolitan Area Survey*
*(HCAP 2016)  Harmonized Cognitive Assessment Protocol*
*(HRS 2016)  Health and Retirement Study*
*(HCDC, H&C)  Housing & Children*
*(HRS LHMS 2017)  Life History Mail Survey*
*(MTTS)  Mathematics Teachers & Teaching Study*
*(MTF-WPSP Year 2/MTF Illume Web 2016)  Monitoring the Future Web Programming and Survey Pilot*
*(MTF Tablet Pilot)  MTF Base Year Tablet Pilot*
*(NSFG 2010-2020)  National Survey of Family Growth*
*(AHRB)  Neurodevelopmental Pathways in Adolescent Health Risk Behavior*
*(YRS)  Optimizing Youth Suicide Risk Screening and Triage In the Emergency Department*
*(PSID-WB)  PSID Wellbeing*
*(SN&WB)  Social Networks and Well Being*
*(SWEL)  Stress and Wellbeing in Everyday Life*
*(SCA 2017)  Surveys of Consumer Attitudes*

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|---|---|
| **Project Name** | Adolescent Brain Cognitive Development (ABCD) |
| **Project Mode** | Primary: Mixed    Secondary: Mixed    Total of Modes: 2 |
| **Project Type** | Sponsored Projects               **Project Status**  Current |
| **Budget** | **Direct Budget:**  277,805.00    **InDirect Budget:**  0.00    **Total Budget:**  430,596.00 |
| **Principal Investigator/Client** | Mary Heitzeg (UM Dept of Psychiatry) |
| **Funding Agency** | NIH |
| **IRB** | **HUM#:**    HUM00106316    **Period Of Approval:**    9/10/2015-1/7/2017 |

**Project Team**

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|---|---|
| **Project Lead:** | Karin Schneider |
| **Budget Analyst:** | Janelle P Cramer |
| **Production Manager:** | _UnAssigned |
| **Senior Project Advisor:** | Stephanie A Chardoul |
| **Production Manager:** | _UnAssigned |
| **Production Manager:** | _UnAssigned |

**Proposal #:** no data

**Description:** ABCD is a longitudinal study of about 10,000 children from ages 9-10 through early adulthood to assess factors that influence individual brain development trajectories and functional outcomes.  UM Dept of Psychiatry is one of 19 research sites across the country.

Sampling statisticians from our Stat and Methods Unit identified all public and private schools with children aged 9-10 within the geographic catchment area for each site.  This activity was under a separate contract and the initial selection of four replicates has been distributed to all research sites.  SRO received an electronic data file listing all selected schools in the UM catchment area.

SRO will target the recruitment of 54 schools from Michigan, who will consent to distribute recruitment letters to parents for participation in the ABCD study. Respondent contact information will be returned directly to the Michigan research team for additional activities, including screening for eligibility.  (Parents return cards with their contact information directly to the PI's staff.)

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|---|---|
| **SRO Project Period** | 05/2016 - 03/2018 |
| **Data Col Period** | 05/2016 - 02/2018 |
| **Security Plan** | NA |

**Milestone Dates**

| | | | |
|---|---|---|---|
| **PreProduction Start:** | 05/15/2016 | **Pretest Start:** | |
| **Pretest End:** | | **Recruitment Start:** | 05/20/2016 |
| **Staffing Completed:** | 05/20/2016 | **GIT Start:** | |
| **SS Train Start:** | | **SS Train End:** | |
| **DC Start:** | 05/20/2016 | **DC End:** | 02/28/2018 |

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|---|---|
| **Other Project Team Members:** | |
| **Other Project Names:** | Adolescent Brain Cognitive Development |
| **Sample Mgmt Sys** | NA |
| **Data Col Tool** | NA |
| **Hardware** | NA |
| **DE Software** | NA |
| **QC Recording Tool** | NA |
| **Incentive** | NA |
| **Administration** | NA |
| **Payment Type** | NA |
| **Payment Method** | NA |

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|---|---|
| **Report Period** | Mar, 2017 (ABCD)        **Project Phase**    Implementing |
| **Risk Level** | On Track |
| **Monthly Update** | We continue to do well with the school recruit.  We dipped into Replicate 5 to help keep the summer clinic traffic up and that has been successful with all the schools we contacted agreeing to participate.  So our current school count is |

65.

**Special Issues**

**Cost**
**Feb 08, 2017**

| | |
|---|---|
| *Total Cost to Date (Direct + Indirect):* | 125,673.00 |
| *Estimated Cost at Completion (E$AC):* | 430,596.00 |
| *Total Budget:* | 430,596.00 |
| *Variance (Budget minus E$AC):* | 0.00 |
| *Reason For Variance:* | |

**Projections**
**Feb 08, 2017**

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|---|---|
| *Dollars Projected For Month:* | 0.00 |
| *Actual Dollars Used:* | 0.00 |
| *Variance (Projected minus Actual):* | 0.00 |
| *Reason For Variance:* | |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| *Current Goal:* | 54 | | |
| *Goal at Completion:* | 54 | | |
| *Current actual:* | 65 | | |
| *Estimate at Complete:* | 70 | | |
| *Variance:* | | | |

**Other Measures**

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|---|---|
| **Project Name** | Army Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study (A-STARRS LS) |
| **Project Mode** | Primary: Web    Secondary: Telephone    Total of Modes: 3 |
| **Project Type** | Sponsored Projects    **Project Status**   Current |
| **Budget** | **Direct Budget:**   8,218,215.00    **InDirect Budget:**   4,520,018.00    **Total Budget:**   12,738,233.00 |

**Principal Investigator/Client**
James Wagner (University of Michigan)
Robert Ursano (Uniformed Services University of the Health Scienc)
Murray Stein (University of California San Diego)

**Funding Agency** Department of Defense

**IRB** **HUM#:** HUM00099203 **Period Of Approval:** 2/18/2016-2/17/2017

**Project Team**
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|---|---|
| **Project Lead:** | Nancy J Gebler |
| **Budget Analyst:** | William Lokers |
| **Production Manager:** | Ruth B Philippou |
| **Senior Project Advisor:** | Mary P Maher |
| **Production Manager:** | Meredith A House |
| **Production Manager:** | Margaret Lee Hudson |

**Proposal #:** no data

**Description:** This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). For STARRS LS, we will attempt to reinterview all respondents form the All Army Study (AAS), New Soldier Study (NSS) and Pre-Post Deployment Study (PPDS) samples using a web-phone multi mode study. Each of the approximately 70,000 eligible respondents will be invited to participate once every two years. In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS LS will continue to maintain and support the Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as de-identified historical administrative data received from the Army and Department of Defense (DoD). Additionally, STARRS LS will continue to receive and link de-identified administrative data to the survey data (from the original Army STARRS data collection as well as STARRS LS surveys). These data will also be made available in the Research Data Enclave.

**SRO Project Period** 02/2015 - 11/2019
**Data Col Period** 10/2015 - 11/2019
**Security Plan** NA
**Milestone Dates**

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|---|---|---|---|
| **PreProduction Start:** | 02/01/2015 | **Pretest Start:** | 10/14/2015 |
| **Pretest End:** | 03/31/2016 | **Recruitment Start:** | |
| **Staffing Completed:** | | **GIT Start:** | |
| **SS Train Start:** | | **SS Train End:** | |
| **DC Start:** | 09/12/2016 | **DC End:** | 09/30/2019 |

**Other Project Team Members:** Andrew Hupp, Heather Schroeder, Leah Roberts, Ryan Yoder, Andrew Piskowrowski, Lisa Lewandowski-Romps, Lamont Manley, Emily Blaczyk, Genise Pattulo, Derek Dubuque, Keith Liebetreu

**Other Project Names:**

| | |
|---|---|
| **Sample Mgmt Sys** | MSMS |
| **Data Col Tool** | Blaise 5 |
| **Hardware** | Desktop |
| **DE Software** | N/A |
| **QC Recording Tool** | Live monitoring |
| **Incentive** | Yes, R |
| **Administration** | SRO Group |
| **Payment Type** | Check, post ($50-$100); Cash, prepaid ($2 (or Challenge coin)); Other (Army STARRS challenge coin (provide |
| **Payment Method** | Check through other system (MSMS); Imprest Cash Fund from ISR Business Office (MSMS); Other (Army STA |

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**Report Period** Mar, 2017 (A-STARRS LS) **Project Phase** Implementing

**Risk Level** *Some Concerns*

**Monthly Update** Activities for March 2017 include:
Project Management and Planning:
• We continued production data collection through the month. We are sending production updates to the PIs twice weekly, and report on production progress each week on the call with the Army/ODUSA.
• We developed a standard set of production reports distributed with the production update. The reports provide

detail on completes and response rates by sample replicate, safety plan, interview length, consent rates, and response rates by subgroups.
• Work with the ODUSA on safety plan and address lookup activities continues to go smoothly.
• We continue to work with Harvard University to review results and update the cost and response rate assumptions used in the current data collection design. We implemented a new Phase 3 experiment and began development of materials and systems for a new end game data collection phase that is scheduled to start in early June.
• We received and signed the subaward from HJF for Year 3 funding.
• We met with the Michigan IRB committee to discuss the protocol deviation involving the safety plan. We worked with the ODUSA to modify the safety plan and Chaplain information materials and submitted the revised materials to IRB.

Enclave and User Support:
• Members of the Enclave IT team continued to maintain security requirements for the Enclave hardware.
• We are preparing to replace a server that has reached the end of its useful life. The cost estimate was submitted to HJF and we are awaiting approval to purchase the equipment. After we receive approval from HJF, it will take approximately three months to purchase and configure the equipment, and go through the required Army review and approval before it can be put into service.
• Background check and Flux user access requests have been processed throughout the month.
• The enclave team continues to answer user questions and process data transfer requests as needed; and continues to receive, track and process requests for new software and license renewals as needed.
• We continue to support the analysis teams using the Army STARRS data.
• We loaded the metadata for the first batch of STARRS-LS survey data into the Enclave. A detailed questionnaire crosswalk is on the Enclave, but we are still working through some technical issues that are preventing the development of the codebook for the STARRS-LS survey data.
• We provided answers and clarification about requirements for access to the ICPSR public use data.

Data Collection Progress and Plans:
• As of March 30, the production statistics are as follows:
o Replicates released: 1-13, with a total of 26,136 sample lines
o Completed Web main interviews: 5,215
o Completed CATI main interviews: 828
o Completed End Game interviews: 23 (19 Web, 4 IVR )
• The second version of the production instrument was released on March 2. This version includes some minor changes to the questionnaire, and changes how the checkpoint data is populated.
• On March 2 we also implemented a new round of experiments for Phase 3-4. This experiment starts with Replicate 10, and tests offering $50 and $100 at Phase 3.
• Table 1 below provides the current timeline for sample replicates 10-13.

Table 1: Timelines for Current Sample Replicates

| | Repl. 10 | Repl. 11 | Repl. 12 | Repl. 13 |
|---|---|---|---|---|
| Phase 1 (letter, coin) | 2/6 - 2/12 | 2/20-2/26 | 3/6-3/12 | 3/20-3/26 |
| Phase 2 (email, text) | 2/13 – 3/1 # | 2/27-3/14 | 3/13-3/28 | 3/27-4/11 |
| Phase 3 ($50/$100, telephone calls)* | 3/2 – 3/17 # | 3/15-3/31 | 3/29-4/14 | 4/12-4/28 |
| Phase 4 ($100, phone calls) | 3/18 – 3/28 | 4/1-4/11 | 4/15-4/25 | 4/29-5/9 |

* For Replicates 10-12 we will implement an experiment offering $50 and $100 at Phase 3.
#Replicate 10: Phase 2 is extended by one day and Phase 3 shortened by one day; to implement the Phase 3 experiment at the same time as the release of the Production 2 version of the instrument.

We worked with Harvard to develop a new end game phase of data collection. The key elements of the plan include the following:
• Total sample = 2,000 non-interviews, from Replicates 3-33 (Replicates 1-2 had an end game phase). Harvard will draw the sample.
• Expected response rate: 25%, yielding 500 completed interviews.
• We will use the same end game instrument as we used for Replicates 1-2.
o The instrument includes a safety plan question.
o We are asking for consent updates (locating with SSN and updating consent to link to admin data), and the brain bank questions.
• Data collection begins on or about May 30 (we are still finalizaing the development timeline).
• We will conduct manual lookups in Accurint to try to improve contact information for end game cases. The Army will complete their manual lookups for any cases that did not go through complete review prior to the start of data collection.
• The contact protocol will include letter sent via USPS priority mail; followed by email invitations and a text message. We will make up to ~4-5 telephone calls to selected participants (the maximum number of calls will be evaluated, and may be adjusted as we get information from the first sample releases).

- Interviewing mode will be web and telephone.  We will not offer IVR as an option.

We have made adjustments in staffing to accommodate the increase in the number of cases assigned to telephone calls.  During March we experienced a shortfall in interviewer hours and are scheduled to train additional interviewers in April.

Data Collection Results:
- Tables 2-3 below show response rates by phase as of March 30.  Table 2 provides results for sample replicates #6-9, which include the second (Phase 4) design experiment.  Table 3 includes initial results for sample replicates 10-13 (in process), which will include the third (Phase 3) design experiment.

Table 2: Final Response Rate by Replicate and Phase: Replicates 6-9

| | Rep 6 | Rep 7 | Rep 8 | Rep 9 |
|---|---|---|---|---|
| Replicate Launch Date | 21-Nov | 5-Dec | 9-Jan | 23-Jan |
| Sample Size | 2,313 | 2,313 | 2,313 | 2,313 |
| Total Interviews | 585 | 566 | 620 | 538 |
| Cumulative Weighted Resp Rate | 34.5% | 35.0% | 36.2% | 31.9% |
| Completion Rates by Phase* | | | | |
| Phase 1 (letter, coin) | 1.6% | 0.9% | 2.4% | 2.6% |
| Phase 2 (email, text msg) | 15.1% | 13.8% | 15.8% | 12.2% |
| Phase 3 ($50, calls) | 13.5% | 16.1% | 13.5% | 9.1% |
| Phase 4a ($100 letter, calls) | 12.1% | 11.1% | | |
| Phase 4b ($100 no letter, calls)** | 13.5% | 11.2% | 10.1% | 12.6% |
| Phase 4c ($100, letter, no calls) | 7.0% | 5.6% | | |
| Phase 4d ($100, no letter, no calls) | 5.4% | 9.5% | | |

  *Phase completion rates are conditional (% completes in that phase)
  **Replicates 8 and 9 Phase 4 cases were all assigned to treatment 4b.

Table 3: Response Rate by Replicate and Phase as of 30 March 2017: Replicates 10-13#

| | Rep 10 | Rep 11 | Rep 12 | Rep 13 |
|---|---|---|---|---|
| Replicate Launch Date | 6-Feb | 20-Feb | 6-Mar | 20-Mar |
| Sample Size | 2,313 | 2,313 | 2,313 | 2,313 |
| Total Interviews | 607 | 405 # | 311 # | 146 # |
| Cumulative Weighted Resp Rate | 35.2% | 19.7% # | 13.4 # | 6.3% # |
| Completion Rates by Phase* | | | | |
| Phase 1 (letter, coin) | 2.9% | 2.8% | 2.5% | 1.7% |
| Phase 2 (email, text msg) | 14.7% | 12.8% | 11.1% | 4.7 # |
| Phase 3a ($100, calls) | 14.5% | 5.4% # | | |
| Phase 3b ($50, calls) | 11.1% | 5.2% # | | |
| Phase 4a (3a) ($100, calls) | 10.0% | | | |
| Phase 4b (3b) ($100, calls) | 10.9% | | | |

*Phase completion rates are conditional (% completes in that phase)
# Replicate 10 is complete.  Replicates 11-13 still being worked; phase not complete

- We continue to coordinate safety plan follow-ups with the Army and the Michigan clinicians.  Table 4 below provides safety plan counts and rates as of 30 March.

Table 4: Safety Plan Counts and Rates as of 30 March

| | # Started Interview | # of Completed Interviews | Safety Plan Checks (N) | % of starts |
|---|---|---|---|---|
| Michigan Clinicians | 2,389 | 2,248 | 389 | 16.4% |
| Army Chaplains | 4,112 | 3,814 | 230 | 5.6% |
| End Game IVR, manually processed | 6 | 4 | 1 | 16.7% |
| Total Sample | 6,507 | 6,066 | 620 | 9.6% |

Cost Report:
Our estimate of current costs, and a preliminary cost-to-complete projection by task and project year is shown in Table 4 below. We spent a total of $309,418 in February 2017 on data collection, production support, project management, data management and reporting, and enclave support.  We are currently projecting a deficit of $429,947 for the total project (3.5% of the total budget), reducing our total cost estimate by $10,381 from last month's report.   We will continue to evaluate the results of the sample releases currently being worked, and will work with Harvard to refine our sample design and contact protocols to bring our total costs for the five-year project period within the total available budget.  We continue to work on costs in all categories to bring our total cost projections within the budgeted amount.

Our cost estimates for Wave 2 (the second interview, to be conducted in Years 4-5 of this project) are still very

preliminary. We are working with Harvard to specify the timeline, scope and data collection design for Wave 2. As decisions are made, we will update our cost projections accordingly.

Table 4: STARRS LS Cost Report for February 2017

| | Pre & Post Production* | Data Collection** | Project Management | Enclave and User Support | Grand Total |
|---|---|---|---|---|---|
| **Year 1** Budget | $570,566 | $55,702 | $247,428 | $245,622 | $1,119,318 |
| Actual Year 1 Costs | $503,866 | $18,789 | $295,639 | $223,616 | $1,041,910 |
| Variance | $66,700 | $36,913 | ($48,211) | $22,006 | $77,408 |
| **Year 2** Budget | $574,123 | $1,976,966 | $462,928 | $618,848 | $3,632,865 |
| Actual Year 2 Costs | $930,775 | $515,665 | $436,499 | $469,847 | $2,352,786 |
| Variance | ($356,652) | $1,461,301 | $26,429 | $149,001 | $1,280,079 |
| **Year 3** Budget | $400,008 | $1,981,395 | $476,249 | $603,408 | $3,461,060 |
| Actual Costs through Jan 17 | $121,151 | $366,062 | $69,781 | $56,125 | $613,118 |
| Actual Costs for Feb 2017 | $56,222 | $175,957 | $40,591 | $36,648 | $309,418 |
| Projected Cost Mar-Nov 17 | $379,597 | $2,058,731 | $354,533 | $458,471 | $3,251,332 |
| Total Year 3 Cost | $556,969 | $2,600,749 | $464,906 | $551,244 | $4,173,868 |
| Variance | ($156,961) | ($619,354) | $11,343 | $52,164 | ($712,808) |
| **Year 4** Budget | $280,594 | $1,055,329 | $410,278 | $654,463 | $2,400,664 |
| Year 4 Projected Total Cost | $349,809 | $1,496,351 | $429,093 | $676,402.71 | $2,951,657 |
| Variance | ($69,215) | ($441,022) | ($18,815) | ($21,939.71) | ($550,993) |
| **Year 5** Budget | $263,619 | $805,264 | $418,806 | $636,637 | $2,124,326 |
| Year 5 Projected Total Cost | $333,117 | $1,236,889 | $438,294 | $639,657 | $2,647,958 |
| Variance | ($69,498) | ($431,625) | ($19,488) | ($3,020) | ($523,632) |
| Total Budget | $2,088,910 | $5,874,656 | $2,015,689 | $2,758,978 | $12,738,233 |
| Total Projected Cost at Completion | $2,674,537 | $5,868,444 | $2,064,430 | $2,560,767 | $13,168,180 |
| Total Variance | ($585,627) | $6,211 | ($48,741) | $198,210 | ($429,947) |

*Includes costs for the pilot, totaling $134,000.
**Data Collection costs for Wave 1 are primarily in Years 1-3; and Wave 2 are Years 4-5.

**Special Issues**

Areas of Risk, Mitigation Strategies:
We continue to track several areas of risk, and develop mitigation strategies.
• Respondent contact and participation.
o We calculated contact and cooperation rates from the first six sample releases, and are finding that the participant rate is high, but our rate of making contact with respondents is lower than we would like.
o We are working a third set of Phase 3 experiments, to determine the optimal time to offer the increased incentive. We will evaluate results in mid-April when Replicates 10 and 11 are complete.
o We are working on options for improving our contact rate, and will include additional locating steps in our new design for Phase 5 end game activities. We plan to implement the new end game design in early June.
o We investigated options for sending additional text messages that are compliant with TCPA regulations, and will send a second text message in the end game protocol.
o Approval to receive batch address updates from DEERS has been requested, and a Memo of Understanding is being prepared by the ODUSA. In the meantime, we are submitting sample lists to the ODUSA for manual look-ups prior to the release of each sample replicate.
o A request is currently under review at Army OGC to provide STARRS with updated contact information from IRS records, using a process similar to that used by the Millennium Cohort study.
• New technical systems.
o Our technical systems are performing well and we have worked out most of the major bugs. We continue to work on upgrades to our technical systems to increase efficiency and lower our project expenses.
o A new version of the Blaise software has been released, and we are evaluating the cost/quality tradeoffs of moving to the latest version of Blaise for Wave 2 data collection.
• Costs/Financing
o We have updated our cost projections with the assumptions in the current design, and are working with Harvard to adjust the subsampling rates and contact protocol as needed to ensure that we stay within budget. Cost projections will be updated as we continue to adjust the study design and scope.
o The scope for Wave 2 data collection has not been finalized. We have a place holder for Wave 2 costs and will need to re-evaluate those assumptions as we finalize the scope and cost estimates for the remainder of Wave 1 data collection.

**Cost**
**Mar 31, 2017**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 4,317,232.00 |
| ***Estimated Cost at Completion (E$AC):*** | 13,168,180.00 |
| ***Total Budget:*** | 12,738,233.00 |
| ***Variance (Budget minus E$AC):*** | -429,947.00 |

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|---|---|
| *Reason For Variance:* | We adjusted the data collection scope assumptions to reflect our current contact protocol for Wave 1 and current staffing needs for data management, reporting, and MSMS.  While MSMS is starting to stabilize, we are still working with slow response times and continue to prioritize our requests for features and utilities that would make the system easier and less costly to use.  We continue to adjust our projections on a monthly basis, and will keep our variance at or near zero by the time the project ends. |

**Projections
Mar 31, 2017**

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|---|---|
| *Dollars Projected For Month:* | 351,749.00 |
| *Actual Dollars Used:* | 309,417.00 |
| *Variance (Projected minus Actual):* | 42,331.00 |
| *Reason For Variance:* | The bulk of this month's under-run is due to respondent payments coming in lower than projected.  We moved unused funds forward to future months, so the total project cost remains unchanged. |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| *Current Goal:* | | | |
| *Goal at Completion:* | | | |
| *Current actual:* | | | |
| *Estimate at Complete:* | | | |
| *Variance:* | | | |

**Other Measures**   For this project, we have response rate and interview count goals for each of the five phases in our contact protocol.  The sample is released in replicates and we are tracking results by phase and replicate.  Tracking information is included in the Monthly updates panel above.

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|---|---|
| **Project Name** | Detroit Metropolitan Area Survey (DMACS) |
| **Project Mode** | Primary: Mixed |

| **Project Type** | Sponsored Projects | **Project Status** | Current |
|---|---|---|---|

| **Budget** | ***Direct Budget:*** 233,426.00 | ***InDirect Budget:*** 23,343.00 | ***Total Budget:*** 256,769.00 |
|---|---|---|---|

| | |
|---|---|
| **Principal Investigator/Client** | Jeff Morenoff (Population Studies) <br> Elisabeth Gerber |
| **Funding Agency** | Kresge Foundation |

| **IRB** | ***HUM#:*** | 00112364 | ***Period Of Approval:*** | 2/25/2017 |
|---|---|---|---|---|

| **Project Team** | | |
|---|---|---|
| | ***Project Lead:*** | Joseph Matthew Matuzak |
| | ***Budget Analyst:*** | Dean E Stevens |
| | ***Production Manager:*** | Bridgitte Wyche McGee |
| | ***Senior Project Advisor:*** | Kirsten Haakan Alcser |
| | ***Production Manager:*** | Joseph Matthew Matuzak |
| | ***Production Manager:*** | Bridgitte Wyche McGee |

| | |
|---|---|
| **Proposal #:** | no data |

**Description:**

The Detroit Metropolitan Area Communities Study (DMACS) seeks to provide an information and innovation platform for conducting research and supporting evidence-based decisions about community investments and public policy. DMACS will be built around a representative web-based panel survey of adult residents of the four-county Metro Detroit region of Southeast Michigan, including Macomb, Oakland, Washtenaw and Wayne Counties, and the City of Detroit. Panel members are to be drawn from diverse communities and will reflect the region's full range of population characteristics, including respondents from traditionally underserved and/or underrepresented groups such as: people with low incomes, education or literacy; those with physical or cognitive disabilities; recent migrants; the elderly; and young adults. When fully implemented, the survey sample will include approximately 2,000 adult residents, selected and recruited based on best scientific practices (ie a probability sample), including representative subsamples of approximately 1,000 Detroit residents and 1,000 adults living throughout the metropolitan area. It is envisioned that panel members will complete a 15-20 minute web-based survey each quarter (i.e., four per year) plus additional short surveys as situations and opportunities arise. The core content on the quarterly DMACS surveys will include questions that ask citizens to prioritize the needs of their community and aspects they would most like to see change (e.g., with regard to crime, business development, jobs, education, housing, transportation, health care, and the environment). It will also monitor trends in citizens' views of changes to their community and the wider region, which groups are benefitting (or being hurt) the most from those changes, views on inequality and its sources and consequences, and the degree of civic engagement in local communities. This core content will provide a clear, nuanced and unprecedented portrait of the people and communities that make up our changing region.

DMACS will also provide the infrastructure to allow shorter surveys on specific questions as they arise, as well as to investigate in greater depth specific issues that affect a particular neighborhood, municipality or portion of the region. In the case of short topical surveys, the web-based survey platform, coupled with a pre-existing panel of survey respondents, means that the study team can put surveys in the field almost immediately, without each time incurring the financial and time-related costs of recruiting and training a whole new sample, training interviewers, and collecting background information on respondents; this work is completed when the panel is initiated. In the case of community deep-dives, we can recruit an "oversample" of participants from a specific geographic area into the panel and use the web platform to administer specialized questionnaires. DMACS also plans to identify audio-visual materials, such as maps, video clips and other items, to gather information. In all cases, DMACS' design will allow the study team to merge detailed information about the survey respondent's local social, economic, physical and political context.

| | |
|---|---|
| **SRO Project Period** | 04/2016 - 02/2017 |
| **Data Col Period** | 07/2016 - 03/2017 |
| **Security Plan** | NA |

**Milestone Dates**

| | | | |
|---|---|---|---|
| ***PreProduction Start:*** | 04/01/2016 | ***Pretest Start:*** | |
| ***Pretest End:*** | | ***Recruitment Start:*** | 07/01/2016 |
| ***Staffing Completed:*** | | ***GIT Start:*** | |
| ***SS Train Start:*** | 10/17/2016 | ***SS Train End:*** | |
| ***DC Start:*** | 10/03/2016 | ***DC End:*** | |

| | |
|---|---|
| **Other Project Team Members:** | Joe Matuzak - Project Manager; Dan Zahs - Sampling; Sue Hodge - SSA; Kirsten Alcser - SPA; Paul Schultz - programmer; Brad Goodwin - data manager; J. Smith - Surveytrak programmer. |

| | |
|---|---|
| **Other Project Names:** | |
| **Sample Mgmt Sys** | SurveyTrak; Illume |
| **Data Col Tool** | Illume; SAQ |
| **Hardware** | Laptop; [UM cell] Phone; Paper and Pencil |
| **DE Software** | Illume |
| **QC Recording Tool** | N/A |
| **Incentive** | Yes, R |
| **Administration** | SRO Group |
| **Payment Type** | Check, post ($20 or $10); Cash, prepaid ($2) |
| **Payment Method** | Check through STrak RPay System; Check through other system (Export from Illume); Imprest Cash Fund from |

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| | | | |
|---|---|---|---|
| **Report Period** | Mar, 2017 (DMACS) | **Project Phase** | Implementing |

*Risk Level*    *Some Concerns*

**Monthly Update**    During February 2017, SRO activities included the following:

Task 1: Management, Budget and Work Plan
• Completed Wave 2 material revisions for IRB submission
o Additional revision created, submitted and approved due to area power outage
Task 2: Sampling
• Wave 2 preload set up and loaded into Illume

Task 3: Questionnaire Development

Task 4: CAI Programming

Task 5: Systems Programming
• Wave 2 reports set up

Tasks 6, 7:  Interviewer Recruitment & Hiring, Training
• Weekly Interviewer meetings conducted

Task 8: Main Data Collection
• Wave 1 web data collection completed
• Respondent Incentive payments processed on a weekly basis.
• Ongoing tracking of missing respondent payment information. Decision made to send interviewers our FTF to try to identify missing respondent names
• Data entry of returned PAPIs completed
• Wave 2 launched, with 216 web interviews completed as of March 31st
o Email and letter invitations sent
o Reminders sent, both web and letter

Task 9: Post Collection Processing
• Wave 1 QC completed
• Mode check conducted and completed
• Wave 1 dataset finalized and delivered to clients

Task 10: Weighting
Task 11: Final Data Deliverables

Cost information:   Kresge Foundation funding

| | | |
|---|---|---|
| Total survey funding awarded: | $ | 256,770 |
| Total Expended as of 3/07/2017 | $ | 207,125 |
| Expected cost at complete | $ | 261,420 |
| Expected Variance: | $ | (4,651) |

Cost explanation: The cost estimate reflects survey funding awarded to Michigan (SRO) for data collection activities, current expenditures, and estimated expenses to the end of the award.

The cost estimate projects an overrun, principally due to inadvertent under-budgeting of interviewer hours and other expenses at the proposal stage.  SRO and SRC reviewed and approved an estimated overrun up to $17,000.  The currently projected overrun is running lower ($4,651), but we will likely have some additional management costs since

we are running behind. We will continue to monitor costs carefully and work with the PIs to keep total costs within the awarded funds plus the SRC approved costs.

**Special Issues**

Areas of Concern:

• Budget/Expenses – The data collection budget continues to be challenging, at this point primarily because we are well behind schedule because we have gotten a far higher percentage of PAPI responses than expected. Further changes in schedule or design are likely to negatively impact the projected expenses.

• This is considered to be a feasibility study. The design of the study is intended to determine if the proposed sampling and contact plan is a feasible way of developing a web survey panel, but there may be unexpected variances. For example, because Wave 1 PAPI response was much higher than expected, the Wave 2 data collection process has been adjusted to try to stimulate more web response. This will have an impact on effort and cost levels, as well as timeline. Response rates expectations may be optimistic for the sampling/contact plan and schedule. Because it is a feasibility study, protocol prescriptions (and budgeted costs) may negatively affect the overall (traditional) response rate for the study.

• The project continues to run behind schedule, but Wave 2 has been launched. With the delay in launch of Wave 2 data collection and the larger PAPI percentage, we will likely end up extending data collection at least through the end of May, but the effort near the study end should be fairly low.

**Cost**
**Mar 07, 2017**

| | |
|---|---|
| *Total Cost to Date (Direct + Indirect):* | 207,125.49 |
| *Estimated Cost at Completion (E$AC):* | 261,420.20 |
| *Total Budget:* | 256,769.00 |
| *Variance (Budget minus E$AC):* | -4,651.20 |
| *Reason For Variance:* | The cost estimate projects an overrun, due to inadvertent under-budgeting of interviewer hours and other expenses. This overrun has been reviewed by SRC, and will continue to be carefully monitored as the project progresses. The expected overrun was estimated to be $17,000. |

**Projections**
**Mar 07, 2017**

| | |
|---|---|
| *Dollars Projected For Month:* | 0.00 |
| *Actual Dollars Used:* | 0.00 |
| *Variance (Projected minus Actual):* | 0.00 |
| *Reason For Variance:* | Data collection costs were pushed forward. |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| *Current Goal:* | 712 | | 1.0 |
| *Goal at Completion:* | 712 | | 1.0 |
| *Current actual:* | 710 | | |
| *Estimate at Complete:* | 710 | | |
| *Variance:* | -2 | | |

**Other Measures**

| | |
|---|---|
| **Project Name** | Harmonized Cognitive Assessment Protocol (HCAP 2016) |
| **Project Mode** | Primary: Face to Face    Secondary: Telephone    Total of Modes: 2 |
| **Project Type** | Sponsored Projects                                    **Project Status**   Current |
| **Budget** | **Direct Budget:**    3,291,705.00    **InDirect Budget:**   1,185,014.00    **Total Budget:**   4,476,719.00 |
| **Principal Investigator/Client** | David Weir (SRC-ISR)<br>Ken Langa (SRC-ISR)<br>Lindsay Ryan (SRC-ISR) |
| **Funding Agency** | |
| **IRB** | **HUM#:**        HUM00099822      **Period Of Approval:**    3/17/2015 - 3/16/201 |

**Project Team**

| | |
|---|---|
| **Project Lead:** | Evanthia Leissou |
| **Budget Analyst:** | Richard Warren Krause |
| **Production Manager:** | Dianne G Casey |
| **Senior Project Advisor:** | Mary P Maher |
| **Production Manager:** | Donnalee Ann Grey-Farquharson |
| **Production Manager:** | Anthony Romanowski |

| | |
|---|---|
| **Proposal #:** | no data |
| **Description:** | This project will involve the completion of a face-to-face CAPI interview, designed to provide a dementia assessment of HRS respondents. A sample of 5000 respondents (one per household) who are 65 years of age or older will be selected for this effort. The questionnaire will be administered to respondents after the HRS 2016 interview has been completed. The sample will not be clustered geographically; it will be selected randomly. It is expected that the field team will carry out well-planned regional trips in order to complete the 3000 in-person interviews. An informant interview will also be completed for each of the respondents interviewed.<br><br>The respondent questionnaire length is expected to be 60 minutes. The informant questionnaire is expected to be 20 minutes and can be administered by telephone when the interviewer calls to set up an appointment with the respondent for the face-to-face interview. |
| **SRO Project Period** | 01/2015 - 12/2017 |
| **Data Col Period** | 05/2016 - 02/2017 |
| **Security Plan** | NA |

**Milestone Dates**

| | | | |
|---|---|---|---|
| **PreProduction Start:** | | **Pretest Start:** | |
| **Pretest End:** | | **Recruitment Start:** | |
| **Staffing Completed:** | | **GIT Start:** | |
| **SS Train Start:** | | **SS Train End:** | |
| **DC Start:** | | **DC End:** | |

| | |
|---|---|
| **Other Project Team Members:** | Applications Programmers: Jeff Smith (STrak), Holly Ackerman (Webtrak, Weblog)<br>CAI Programmer: Jim Hagerman<br>Data Manager: Brad Goodwin<br>Help Desk: Deb Wilson |
| **Other Project Names:** | |
| **Sample Mgmt Sys** | SurveyTrak |
| **Data Col Tool** | Blaise 4.8 |
| **Hardware** | Laptop; [UM cell] Phone; Paper and Pencil |
| **DE Software** | Excel |
| **QC Recording Tool** | DRI-CARI; Camtasia |
| **Incentive** | Yes, R; Yes, INF |
| **Administration** | NA |
| **Payment Type** | Check, prepaid ($50); Check, post ($25) |
| **Payment Method** | Check through STrak RPay System |

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| | | | |
|---|---|---|---|
| **Report Period** | Mar, 2017 (HCAP 2016) | **Project Phase** | Implementing |
| **Risk Level** | *Some Concerns* | | |
| **Monthly Update** | As of February 28, we completed 2547 Respondent and 2226 Informant interviews. A new sample release will be done once the generated sample from HRS 2016 is reviewed by the research team. It is expected that the remaining sample to be released to HCAP will be less than originally anticipated. Two factors have influenced the decision; first | | |

because the response rates being achieved are higher than budgeted, and second because of the need to balance the subgroups within the sample.

Given the lower sample size and the delay to be released the decision to hold another training has been postponed. It is highly likely we will not hold another interviewer training. It is estimated that production will go through July 2017.

**Special Issues**

**Cost**
**Feb 17, 2017**

| | |
|---|---|
| *Total Cost to Date (Direct + Indirect):* | 3,199,967.72 |
| *Estimated Cost at Completion (E$AC):* | 4,814,523.94 |
| *Total Budget:* | 4,476,719.00 |
| *Variance (Budget minus E$AC):* | -337,801.94 |
| *Reason For Variance:* | Several workscope changes have been implemented including additional cognitive tests for the Respondent interview, length of interviewer training, interviewer retention bonus, project management staff hours, and respondent incentives. |

In addition, actual interviewer rates are higher than the rates used on the budget. All interviewers working on the project are on-staff.

**Projections**
**Feb 17, 2017**

| | |
|---|---|
| *Dollars Projected For Month:* | 0.00 |
| *Actual Dollars Used:* | 0.00 |
| *Variance (Projected minus Actual):* | 0.00 |
| *Reason For Variance:* | |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| *Current Goal:* | | | |
| *Goal at Completion:* | | | |
| *Current actual:* | | | |
| *Estimate at Complete:* | | | |
| *Variance:* | | | |

**Other Measures**

| | |
|---|---|
| **Project Name** | Health and Retirement Study (HRS 2016) |
| **Project Mode** | Primary: Mixed      Total of Modes: 2 |

| **Project Type** | Sponsored Projects | **Project Status** | Current |
|---|---|---|---|

| **Budget** | **Direct Budget:** | 24,690,534.00 | **InDirect Budget:** | 8,888,593.00 | **Total Budget:** | 33,579,127.00 |
|---|---|---|---|---|---|---|

**Principal Investigator/Client**
David Weir (SRC)
Mary Beth Ofstedal (SRC)
Ken Langa (SRC)

**Funding Agency**   NIA

| **IRB** | **HUM#:** | HUM00061128 | **Period Of Approval:** | 1/15/2015 - 1/14/201 |
|---|---|---|---|---|

| **Project Team** | **Project Lead:** | Nicole G Kirgis |
|---|---|---|
| | **Budget Analyst:** | Richard Warren Krause |
| | **Production Manager:** | Stephanie Sullivan |
| | **Senior Project Advisor:** | Mary P Maher |
| | **Production Manager:** | Jennifer C Arrieta |
| | **Production Manager:** | Piotr Dworak |

**Proposal #:**   no data

**Description:**   The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort will be added.  A series of physical measures and biomarkers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records and Veterans Administration (VA) records is requested.

**SRO Project Period**   04/2015 - 06/2017
**Data Col Period**   02/2016 - 04/2017
**Security Plan**   NA

**Milestone Dates**

| | | | |
|---|---|---|---|
| **PreProduction Start:** | 04/01/2015 | **Pretest Start:** | 10/16/2015 |
| **Pretest End:** | 11/07/2015 | **Recruitment Start:** | 06/01/2015 |
| **Staffing Completed:** | 03/15/2016 | **GIT Start:** | 02/10/2016 |
| **SS Train Start:** | 02/12/2016 | **SS Train End:** | 04/24/2016 |
| **DC Start:** | 02/22/2016 | **DC End:** | 04/29/2017 |

**Other Project Team Members:**   Rebecca Gatward (Survey Director), Sharon Parker (Production Management Coordinator), Frost Hubbard (New Cohort), Jennifer Kelley (Respondent Contact Coordinator), Jaime Koopman (Project Manager), Russ Stark (SSL Production Manager), Ian Ogden (Project Assistant), Dan Tomlin (Project Assistant), Lisa deRamos (Project Assistant), Daniah Buageila (Project Assistant)

**Other Project Names:**

| | |
|---|---|
| **Sample Mgmt Sys** | SurveyTrak; MSMS |
| **Data Col Tool** | Blaise 4.8 |
| **Hardware** | Laptop |
| **DE Software** | NA |
| **QC Recording Tool** | DRI-CXM |
| **Incentive** | Yes, R |
| **Administration** | SRO Group |
| **Payment Type** | Check, prepaid (80.00) |
| **Payment Method** | Check through STrak RPay System |

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| **Report Period** | Mar, 2017 (HRS 2016) | **Project Phase** | Implementing |
|---|---|---|---|

**Risk Level**   *Some Concerns*

**Monthly Update**   During the month of March, data collection for the new cohort and panel components continued. Panel sample remained the focus to ensure continued in preparation for the April 2017 New Cohort trainings. Another recruitment effort and training is being planned for June to support New Cohort production.

Technical Development: Further development in production systems continues (including WebTrak and WebLog).

Health and Retirement Study - 2017/18 technical development update – March 2017
Milestones
- Web pilot (MSMS + Blaise 5)  - July 2017
- CAPI mode pilot - July 2017 (SSL and Field interviewers)
- Key decision point - late August/early September 2017 – systems and modes for 2018 (MSMS/B5/B4.8/ST)

Blaise 5 Instrument Development

Current focus
- Programmers are concentrating on the web version. Work on the CAPI questionnaire is on hold until B5 screen templates have been finalized.
- 10 of 23 sections of the HRS questionnaire have been designed, programmed and final CAWI testing is done or in process.
- Work continues to develop the optimum design to collect information about individuals in the survey. This is, currently collected using rosters/tables, in web and TEL/FTF modes. Feasibility testing of these sections is planned for March – May 2017.
Issues, solutions and/or implications
- Compiling the questionnaire takes longer in Blaise 5 than 4.8 – currently with fewer than ½ of the survey sections active, it takes more than 90 minutes to compile a DM (with pages). Compiling without pages causes a 4-10 second delay in presenting each new screen when testing. HRS programmers have created work arounds and the issue was reported to CBS.
- We currently do not have Blaise 5.2 MVC router functions (we had routers in Blaise 4.8 and in Blaise 5.0 (ASP). Of the five routers we have on our waiting list, one (for applying comma masks to amount questions) is critical.  If we do not get this router, we will not be able to conduct our Pilot Test.
Dependencies
- Next Blaise 5.2 release, currently scheduled for May 31.
- Receiving Blaise 5.2 bug fixes from CBS (acknowledged, no word yet on next bug fix version)
- Completion of the Blaise 5 templates for interviewer administered modes – currently scheduled for 24 March.

MSMS Development

Current focus
- Production management features, interviewer performance, and offline interviewer workflow refinements.
Issues, solutions and/or implications
- TSG resources with the right skills are spread thin.  We have used temporary contractors effectively, but we recently lost our contractor, who moved out of state for family reasons.  We are in the process of replacing him.  There will be a productivity drop as we train his replacement.
Dependencies
- Blaise 5 offline DEP delivery, currently scheduled for May 31.

Transition to Blaise 5 - HRS systems and processes

Current focus
- B5 offline on laptops – work to develop a system to run Blaise 5 offline on laptops is currently in the planning stage and is part of the SRC Blaise 5 project (led by Gina-Qian Cheung). The process will be determined by end June. Functionality required to implement the process is due to be included in the next major Blaise 5 version (May 31).
Issues, solutions and/or implications
- The HRS (SRO and SRC), MSMS and B5 teams need to work closely to ensure all HRS requirements are considered in the B5 offline solution and to minimise the risk involved in this transition - particularly preload requirements.
Dependencies
- Blaise 5 offline DEP delivery, currently scheduled for May 31.

Overall schedule and other items

- Web pilot is now scheduled for July 2017. The pilot was delayed (from May) because we decided not to go ahead until some key design related functionality is available through 'Routers' (masking and suppressible checks).

- Lead team meetings are scheduled. Initial meetings will focus on development plans, implications of a move to MSMS and Blaise, and subsequent meetings will focus on updates from teams and any topics that require discussion across the full team (rather than smaller working groups).

**Special Issues**

**Cost**
**Feb 28, 2017**

| | |
|---|---|
| *Total Cost to Date (Direct + Indirect):* | 27,645,483.67 |
| *Estimated Cost at Completion (E$AC):* | 36,029,857.85 |
| *Total Budget:* | 33,579,127.00 |
| *Variance (Budget minus E$AC):* | -2,450,730.85 |
| *Reason For Variance:* | Projections have been refined to add an April New Cohort training, to extend data collection for New Cohort into November 2017, and to add interviewer bonuses. |

**Projections**
**Feb 28, 2017**

| | |
|---|---|
| *Dollars Projected For Month:* | 1,198,988.99 |
| *Actual Dollars Used:* | 1,168,410.44 |
| *Variance (Projected minus Actual):* | 30,578.55 |
| *Reason For Variance:* | Actual dollars for the month of February came in just under projections due to Rpay, printing, and advertising coming in lower than projected. These projections have been pushed forward. |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| *Current Goal:* | 23,569 | 85% | 7.45 |
| *Goal at Completion:* | 23,569 | 85 | 7.45 |
| *Current actual:* | 18,196 | 66% | 7.89 |
| *Estimate at Complete:* | 23,569 | 85 | 8.0 |
| *Variance:* | | | |

**Other Measures**

Goal for New Cohort is 5,228 interviews.
Goal for Panel Iws is 18,341 interviews (85%).

| | |
|---|---|
| **Project Name** | Housing & Children (HCDC, H&C) |
| **Project Mode** | Primary: Face to Face    Total of Modes: 1 |

| | | | | | |
|---|---|---|---|---|---|
| **Project Type** | Sponsored Projects | | **Project Status** | Current | |
| **Budget** | ***Direct Budget:***  8,774,925.00 | ***InDirect Budget:***  1,968,094.00 | ***Total Budget:*** | 10,743,019.00 | |

**Principal Investigator/Client**

**Funding Agency**

**IRB**  ***HUM#:***  HUM00114794    ***Period Of Approval:***

**Project Team**
***Project Lead:***  Grant D Benson
***Budget Analyst:***  William Lokers
***Production Manager:***  Barbara Aghababian-Homburg
***Senior Project Advisor:***  Mary P Maher
***Production Manager:***  Barbara Lohr Ward
***Production Manager:***  Maryam N Buageila

**Proposal #:**  no data

**Description:**

Low-income parents face serious constraints when they seek housing, and these constraints may undermine their childrens' development. In many cases, low-income parents will face tradeoffs between dwelling unit quality, neighborhood quality, and school quality. This project has four main aims: (1) to learn how parents negotiate these tradeoffs and make choices about where to live; (2) to assess how features of the child's social contexts--home, neighborhood, and school-- combine to influence key cognitive socio-emotional and health outcomes among parents and their children; (3) to examine how the quality of housing affects parenting practices and outcomes for children and their caregivers; and (4) to enhance the study of child development through theoretical and methodological advances in the study of housing and the other social contexts related to housing.

The project proposes to conduct two waves of data collection, separated by about 12 months, with families in Seattle, Dallas and Cleveland.  In-person interviews will be completed with ~ 1686 parents and 2328 children aged 3-10 (at Wave 1).  One-half of the sample will be an experimental sample consisting of applicants  for a federal housing voucher.  This experiment sample will include both voucher winners (treatment group) and voucher losers (control group).  The other half of the sample will be generated through a random selection and screening process in census blocks that vary by household income weighted toward lower-income blocks.  Each interview with an adult will last about 90 minutes, and will include the collection of anthropometric measures from all sample persons (including children), administration of Woodcock-Johnson tests to children.  Adult Voucher sample participants will be asked for three blood pressure measurements, and blood spots will be collected from Voucher sample adults and children.  The data collection also includes collecting laser tape measurement of all rooms in a household, 8 block face neighborhood observations, a four-day leave-behind child time diary, and post-interview observations.

**SRO Project Period**  04/2016 - 02/2020
**Data Col Period**  05/2017 - 05/2018
**Security Plan**  NA
**Milestone Dates**

| | |
|---|---|
| ***PreProduction Start:***  04/01/2016 | ***Pretest Start:***  10/24/2016 |
| ***Pretest End:***  12/31/2016 | ***Recruitment Start:***  06/01/2016 |
| ***Staffing Completed:***  05/02/2017 | ***GIT Start:***  04/30/2017 |
| ***SS Train Start:***  05/10/2017 | ***SS Train End:***  05/18/2017 |
| ***DC Start:***  05/22/2017 | ***DC End:***  05/23/2018 |

**Other Project Team Members:**

| Other Project Names: | |
|---|---|
| Sample Mgmt Sys | SurveyTrak; SMS |
| Data Col Tool | Blaise 4.8; SAQ |
| Hardware | Laptop; Desktop; [UM cell] Phone; Paper and Pencil; Other  (laser measurement device) |
| DE Software | Blaise 4.8 BIA ; External vendor (TBD) |
| QC Recording Tool | DRI-CARI |
| Incentive | Yes, R; Yes, INF; Yes, Other (screening households) |
| Administration | SRO Group |
| Payment Type | Cash, prepaid ($5 for subsample); Cash, post ($75 adult, $50 child); Other  (child gift <$5, Finders fee $10, chilc |
| Payment Method | Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office |

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| Report Period | Mar, 2017 (HCDC, H&C) | **Project Phase** | Implementing |
|---|---|---|---|

*Risk Level*  *Some Concerns*

**Monthly Update**

During March 2017, SRO activities included the following:
Task 1: Management, Budget and Work Plan
% Task Spent to Date
• Held regular meetings with the research team to discuss design, deliverables, schedule, funding and modify questionnaires
• Revised and updated project schedule.
• Prepared invoices and invoice documentation.  Updated invoice receivables schedule.
• Reviewed/monitored spending compared to budget. Revised monthly projections.
• Updated ballpark budget for Financial SAQ based on revised administration specifications.
• Worked with Office of Sponsored Research to facilitate review of draft data use agreement between JHU and UM.
• Drafted Respondent concerns letters, updated study brochure.
• Met with printing/design vendors to discuss possible improvements to the design of the study brochure.  Updated all production documents.  Drafted and submitted Michigan IRB application
• Conducted further analysis of Pilot data to evaluated per-section interview timing, timing differences between one-child and two-child households, variance in time to complete physical measures and dried blood spots, vignettes.
• Began specification of production data deliverables, listing PII variables and datasets required.
• Prepared materials to elaborate protocol on handling non-standard blocks during Neighborhood observations.
• Issued RFQ for kitting production materials. Answered vendor questions.  Analyzed vendor response and selected vendor.
• Held meetings to discuss production reporting needs.
• Coded new Lego Activity videos to re-establish reliability for main trainers.  Submitted videos to Tufts for scoring.

Task 2: Sampling
% Task Spent to Date
• Analysis of Pilot Production by Income level and strata
• Conducted meeting with PIs to discuss Pilot production results and sample plan for production.  Prepared powerpoint for sample meeting
• Pilot Eligibility Analysis & Eligibility Estimation
• Frame Analysis and Mapping
• Frame Data Compilation
• Allocation calculations & discussion
• Documentation

Task 3: Questionnaire Development
% Task Spent to Date
• Interviewing Systems Maintenance and Development, Preparation for Main Production
o PCG Interview
□ Updated and finalized PCG Interview specifications
□ Revised HH and Child SAQs as necessary, updated formatting as necessary, created final versions.
□ Updated draft Financial R SAQ, finalized formatting.
o Child Interview
□ Updated specifications to include gathering status information on SAQ completion, updated preload variables.
o Laser Tape Measurement
□ Began testing draft instrument
o Screening Questionnaire
□ Began testing Population sample screener
o Sample Management System
□ Updated specification for Contact Observations
□ Specified preload and postload.
□ Updated Webtrak specifications

- ☐ Began work on reports specifications
- •

Task 4: CAI Programming
% Task Spent to Date
- • Child
- o Continued programming updates to Child questionnaire
- o Purchased license for Inquisit (Hearts & Flowers)
- o Screener
- ☐ Continued programming on Voucher and Population sample screener
- • Laser Tape Measurement
- o Programmed updates, sent to testing team.
- • PCG
- o Began programming PRS section
- o Began programming other sections of PCG

Task 5: Systems Programming
% Task Spent to date
- • Updated programming/testing calendar.  Made assignments for programming and testing.
- • Evaluated preload data. Made corrections as needed to transfer of data between programs.
- • Continued development of SurveyTrak specifications (SRC's sample management system) for main study implementation. Updated specifications on contact observations, added specifications for locating
- • Continued programming of logging application
- • Programmed locating application – sent to testers.
- • Began programming Webtrak

Tasks 6, 7:  Interviewer Recruitment & Hiring, Training
% Task Spent to Date
- • Updated site selections for study-specific training.
- • Began site selection/finalization for Train-the-Trainer and Team Leader training.
- • Reposted/re-evaluated position postings.  Evaluated applications on an ongoing basis.
- • Made recruitment trips to Dallas TX and Cleveland, OH.  Hired 10 interviewers in Dallas TX.
- • Revised/elaborated day-by-day training agenda, revised training assignments
- • Elaborated plans for pre-training study materials for data collection staff
- • Began production of videos for pre-training and training
- • Began updating training manual chapters and powerpoint presentations.
- • Began specification of items to be loaded on laptops
- • Began specification of training sample lines needed.

Task 8: Main Data Collection
% Task Spent to Date
- • Prepared, formatted materials for main study
- • Ordered/received supplies.  Began shipping supplies to kitting vendor

Task 9: Post Collection Processing
% Task Spent to Date
- • N/A

Task 10: Weighting
% Task Spent to Date
- • N/A

Task 11: Final Data Deliverables
% Task Spent to Date

**Special Issues**

Areas of Concern:

• The programming timeline between Pilot and Production launch is very short. There is insufficient time to translate, program, and test the final production instruments for the May 22 launch. Delays in launching a Spanish module will likely have an impact on first quarter response rates and completion rates, especially in Dallas.

• The frame for the population sample must be determined by March 3 in order to have sufficient time to develop and select the population sample. The Voucher sample will be used to determine the Population sample frame. If the Voucher sample is not received by March 3, there is a risk of a mismatch between the Population sample and the Voucher sample.

• The adult interview is considerably longer than budgeted. We estimate that about 13 minutes must be cut from the interview length to bring it back into line with budgeted estimates, although the Pilot analysis suggests that this did not substantially impact hours per interview (HPI). Therefore, SRC suggested we go into the main study with the instrument at the current length with a plan for cutting during production if needed; the research team indicated that we wanted to avoid any cuts during production.

• The rate of return for the Child Time Diary is very low, despite reminder calling. SRC will work with the research team to develop a strategy to increase the return rate for this component.

• A review of training objectives has made it clear that it will not be possible to cover all instrument areas within the allotted training days; SRC has initiated work on supplemental trainings that could be completed by interviewers post-training, but this will not address the full set of training needs given an expected large cohort of new hires.


Work Scope Changes:

• Questionnaire Development – Budgets assumed that questionnaires would be final at project initiation except for the Household Listing and Household Confirmation protocol. Questionnaires required extensive editing. SRC to review all questionnaires for question wording issues (especially problems created by moving questions to SAQ), create and insert transitions, review and suggest changes to module and/or question ordering.

• Questionnaire Development – Additional (and unanticipated) programming is needed for Hearts and Flowers due to a timing specification change received from research team.

• Work with ICPSR to prepare scope and budget for production of public use datasets.

• At the request of the research team, SRC is developing a locating program and recruiting locating staff due to expectations that a much higher proportion of phone numbers for the Voucher sample will be unusable.

• SRC is preparing for the addition of a Financial SAQ, for approximately 800 households, with an anticipated payment of $25 per respondent. The SAQ is largely composed of open-ended questions. SRO will develop, print and distribute the SAQ, and will log receipt of the SAQ. SRO will not data enter the SAQ.

**Cost**
**Mar 17, 2017**

| | |
|---|---|
| *Total Cost to Date (Direct + Indirect):* | 1,416,010.00 |
| *Estimated Cost at Completion (E$AC):* | 10,733,151.00 |
| *Total Budget:* | 10,743,019.00 |
| *Variance (Budget minus E$AC):* | 9,868.00 |
| *Reason For Variance:* | We expect to use the entire budget at the end of the project period |

**Projections**
**Mar 17, 2017**

| | |
|---|---|
| *Dollars Projected For Month:* | 190,138.00 |
| *Actual Dollars Used:* | 138,313.00 |
| *Variance (Projected minus Actual):* | 51,824.00 |
| *Reason For Variance:* | Programming and testing is running behind schedule, due to delays in receiving final specifications. A salary large credit for $22,000 hit the accounts in February. |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| *Current Goal:* | | | |
| *Goal at Completion:* | | | |
| *Current actual:* | | | |
| *Estimate at Complete:* | | | |
| *Variance:* | | | |

**Other Measures**

| | |
|---|---|
| **Project Name** | Life History Mail Survey (HRS LHMS 2017) |
| **Project Mode** | Primary: Mail    Total of Modes: 1 |
| **Project Type** | Sponsored Projects |

| | | | | |
|---|---|---|---|---|
| **Project Type** | Sponsored Projects | | **Project Status** | Current |
| **Budget** | *Direct Budget:* 338,063.61 | *InDirect Budget:* 185,933.94 | *Total Budget:* 523,997.55 | |

| | |
|---|---|
| **Principal Investigator/Client** | Mary Beth Ofstedal (ISR)<br>Jacqui Smith (ISR)<br>David Weir (ISR) |
| **Funding Agency** | |
| **IRB** | *HUM#:*                          *Period Of Approval:* |
| **Project  Team** | *Project Lead:*          James Koopman<br>*Budget Analyst:*       Janelle P Cramer<br>*Production Manager:*   James Koopman<br>*Senior Project Advisor:*  Evanthia Leissou<br>*Production Manager:*<br>*Production Manager:* |
| **Proposal #:** | no data |
| **Description:** | LHMS is a principal investigator (Jacqui Smith) led research which started in 2015. The research was conducted within the context of the Health and Retirement Study off-year surveys.  In 2015, HRS respondents were invited to participate in LHMS survey which included life history questions. The LHMS 2017 study will mail self-administered questionnaires to approximately 5,000 HRS respondents. The response rate expected is 70%, estimating 3,500 questionnaires will be returned.<br><br>The HRS will continue this effort during its 'off year' from main data collection, and the goal is to have every HRS respondent complete this questionnaire. SRO's goal is to create a stable and successful platform for the continuation of this effort.<br><br>All contact attempts with the respondents will be via US Mail and there is no pretest for this survey. There are two parts to the questionnaire. The first part is a life history calendar and the second is a traditional questionnaire asking about the respondent's life before the age of 50. These questions are mainly focused on housing, school and work history.<br><br>An initial mailing of the questionnaire will be done in late April. The mailing will include a check for $25 as token of appreciation. There will be 3 follow up mailings:<br><br>•     Four weeks after the original questionnaire mailing, a second questionnaire will be sent to persons who have not returned the original mail survey.<br>•     Approximately six weeks after the original questionnaire mailing, a thank you postcard will be sent to those respondents who have returned a completed questionnaire and a reminder postcard will be sent to those respondents who have not responded either by returning a completed questionnaire or by refusing to participate. The reminder postcard will include both a thank you to those who have already responded, and a reminder to those who have not yet done so. |
| **SRO Project Period** | 01/2017 - 06/2017 |
| **Data Col Period** | 04/2017 - 06/2017 |
| **Security Plan** | NA |

**Milestone Dates**

| | | | |
|---|---|---|---|
| *PreProduction Start:* | | *Pretest Start:* | |
| *Pretest End:* | | *Recruitment Start:* | |
| *Staffing Completed:* | | *GIT Start:* | |
| *SS Train Start:* | | *SS Train End:* | |
| *DC Start:* | | *DC End:* | |

| | |
|---|---|
| **Other Project Team Members:** | James Koopman, Eva Leissou and Ann Vernier |

**Other Project Names:**

| | |
|---|---|
| **Sample Mgmt Sys** | Other (Excel and reports from CASO) |
| **Data Col Tool** | Other (Mail Survey) |
| **Hardware** | NA |
| **DE Software** | External vendor (CASO) |
| **QC Recording Tool** | N/A |
| **Incentive** | Yes, R |
|    **Administration** | SRO Group; ISR Group |
|    **Payment Type** | Check, prepaid ($25.00) |
|    **Payment Method** | Check through STrak RPay System |

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| | |
|---|---|
| **Report Period** | Mar, 2017 (HRS LHMS 2017)      **Project Phase**    Initiation |
| *Risk Level* | *On Track* |
| **Monthly Update** | There is nothing to update. We are still waiting on IRB and expect to submit the first week of April. |
| **Special Issues** | |

**Cost**
**Apr 30, 2017**

| | |
|---|---|
| *Total Cost to Date (Direct + Indirect):* | 6,337.15 |
| *Estimated Cost at Completion (E$AC):* | 499,537.92 |
| *Total Budget:* | 523,997.55 |
| *Variance (Budget minus E$AC):* | 0.00 |
| *Reason For Variance:* | |

**Projections**
**Apr 30, 2017**

| | |
|---|---|
| *Dollars Projected For Month:* | 24,057.40 |
| *Actual Dollars Used:* | 0.00 |
| *Variance (Projected minus Actual):* | 0.00 |
| *Reason For Variance:* | |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| *Current Goal:* | | | |
| *Goal at Completion:* | | | |
| *Current actual:* | | | |
| *Estimate at Complete:* | | | |
| *Variance:* | | | |

**Other Measures**

| | |
|---|---|
| **Project Name** | Mathematics Teachers & Teaching Study (MTTS) |
| **Project Mode** | Primary: Mail    Secondary: Telephone    Total of Modes: 2 |
| **Project Type** | Sponsored Projects    **Project Status**   Current |
| **Budget** | **Direct Budget:**   656,787.81    **InDirect Budget:**   362,629.19    **Total Budget:**   1,019,417.00 |
| **Principal Investigator/Client** | Heather Hill (Harvard Graduate School of Education)<br>Patty Maher (ISR PI) |

**Funding Agency**

**IRB**    **HUM#:**    HUM90379    **Period Of Approval:**    6/25/2014-6/25/2015

**Project Team**

| | |
|---|---|
| **Project Lead:** | Barbara Lohr Ward |
| **Budget Analyst:** | Dean E Stevens |
| **Production Manager:** | Russell W Stark |
| **Senior Project Advisor:** | Stephanie A Chardoul |
| **Production Manager:** | Anthony Romanowski |
| **Production Manager:** | |

**Proposal #:**    no data

**Description:**    For the last 25 years, three major goals have animated the U.S. mathematics education community: the need for more knowledgeable teachers, more challenging curricula for students, and more ambitious instruction in classrooms. And yet despite volumes of policy guidance, on-the-ground effort and research over the past decades, few comprehensive and representative portraits of teacher and teaching quality in U.S. mathematics classrooms exist.  Instead, most research into these topics has been conducted with small samples or non-representative samples (e.g., Kane & Staiger, 2012), with the result that it is difficult to
ascertain what, if any, progress has been made toward the three goals. To provide information on such progress, we will collect data on teacher content knowledge, curriculum use, and instruction from a nationally representative sample of U.S. middle school
mathematics teachers. A written survey will build on a similar study conducted in 2005 – 06 (Hill, 2007), allowing for the comparison of teachers' curriculum use and content knowledge – and more specifically, their mathematical knowledge for teaching (MKT) –across time periods.  An observational component will record and score videotapes of instruction, allowing for a
description of current instruction as well as a comparison of current instruction to that observed during the TIMSS video study (Heibert et al., 2005). The new video dataset will also serve as a baseline for future studies of instruction, for instance ones comparing current instruction to that in 2025, to assess whether Common Core State Standards have been met.

| | |
|---|---|
| **SRO Project Period** | 09/2014 - 06/2016 |
| **Data Col Period** | 01/2015 - 12/2015 |
| **Security Plan** | NA |

**Milestone Dates**

| | | | |
|---|---|---|---|
| **PreProduction Start:** | 10/01/2014 | **Pretest Start:** | |
| **Pretest End:** | | **Recruitment Start:** | 01/26/2015 |
| **Staffing Completed:** | | **GIT Start:** | |
| **SS Train Start:** | | **SS Train End:** | |
| **DC Start:** | 03/02/2015 | **DC End:** | 05/31/2016 |

**Other Project Team Members:**

Barb Ward - Lead
Russ Stark - Production Lead
Judi Clemens, Donnalee Grey-Farquharson - District IRB
Dan Zahs, Paul Burton - Sampling
Hueichun Peng - Technical Lead, SRIS
Jim Hagerman - Blaise
Shaowei Sun- SRIS
Laura Yoder - Data Mgt

**Other Project Names:**

| | |
|---|---|
| **Sample Mgmt Sys** | SMS; Project specific system (SRIS) |
| **Data Col Tool** | SAQ; Other (video recorded on tablet) |
| **Hardware** | Desktop; Tablet; Other (Tablets, Swivls, Tripods provided by research team) |
| **DE Software** | Blaise 4.8 BIA |
| **QC Recording Tool** | N/A |
| **Incentive** | NA |
|    **Administration** | NA |
|    **Payment Type** | Check, post ($50 for SAQ, $200 video); Cash, prepaid (5) |
|    **Payment Method** | Check through other system (ISR Business Office); Imprest Cash Fund from ISR Business Office (ISR Business |

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| | | | |
|---|---|---|---|
| **Report Period** | Mar, 2017 (MTTS) | **Project Phase** | Closing |

*Risk Level*      *On Track*

**Monthly Update**

During March, 2017, SRO activities included the following:

Task 1: Management, Budget and Work Plan
- Revised monthly projections
- Prepared monthly report.

Task 2: Sampling

Task 3: Questionnaire Development

Task 4: CAI Programming

Task 5: Systems Programming

Tasks 6, 7: Interviewer Recruitment & Hiring, Training

Task 8: Main Data Collection

Task 9: Post Collection Processing
- Revised final progress reports for MQI data collection.
- Analyzed process data, IRB data for final report. Prepare preliminary tables.

Task 10: Weighting

Task 11: Final Data Deliverables
- Edited sections of data book and final project documentation, shared with Harvard
- Exported files sample results, district, school and teacher information from SRIS
- Uploaded district IRB files, approvals to Harvard X drive.

Task 12: Video Storage Systems (EWB)
- No activity

Cost information: Harvard subcontract funded by the National Science Foundation

| | |
|---|---|
| Total survey funding awarded: | $ 1,019,417 |
| Total Expended as of 2/28/2017 | $ 951,004 |
| Expected cost at complete | $ 1,019,417 |
| Expected Variance: | $ 25,842 |

Cost explanation:
The cost estimate reflects survey funding awarded to Michigan (SRO) for data collection activities, current expenditures, and estimated expenses to the end of the award. This report includes a de-obligation of $57,000. The final estimate includes additional work scope to draw a sample for the MKT, periodically monitor the MKT sample using reports prepared by Harvard, and production of weights and non-response adjustments and assist with production of a methodology report. In addition, the estimate includes additional sampling effort to draw a sample of unselected teachers for a non-response study that will be conducted by Harvard in the Fall of 2016, and develop weights and estimates for that new sample.

Special Notes:

District Recruitment
- District recruitment ended in mid-December.
- Principal recruitment ended in mid-February.

MQI Teacher Recruitment
- Teacher recruitment ended on March 18, 2016.

**Special Issues**

**Cost**
**Mar 17, 2017**

| | |
|---|---|
| *Total Cost to Date (Direct + Indirect):* | 951,004.00 |
| *Estimated Cost at Completion (E$AC):* | 993,574.00 |
| *Total Budget:* | 1,019,417.00 |
| *Variance (Budget minus E$AC):* | 25,842.00 |
| *Reason For Variance:* | Work scope changes, and a much lower response rate than anticipated have led to the underrun. |

**Projections**
**Mar 17, 2017**

| | |
|---|---|
| *Dollars Projected For Month:* | 18,143.00 |
| *Actual Dollars Used:* | 1,984.00 |
| *Variance (Projected minus Actual):* | 11,705.00 |
| *Reason For Variance:* | Planned work was delayed due to deadlines on other projects.  Spending at the SOE has been deferred until a future date. |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| *Current Goal:* | | | |
| *Goal at Completion:* | | | |
| *Current actual:* | | | |
| *Estimate at Complete:* | | | |
| *Variance:* | | | |

**Other Measures**

| | |
|---|---|
| **Project Name** | Monitoring the Future Web Programming and Survey Pilot (MTF-WPSP Year 2/MTF Illume Web 2016) |
| **Project Mode** | Primary: Web      Secondary: Mail      Total of Modes: 2 |
| **Project Type** | Sponsored Projects                                    **Project Status**   Current |
| **Budget** | **Direct Budget:**      280,748.00      **InDirect Budget:**   154,410.00      **Total Budget:**   435,158.00 |
| **Principal Investigator/Client** | Megan Patrick (UM-SRC) |

**Funding Agency**  U.S. Department of Health & Human Services, National Institutes of Health

**IRB**  **HUM#:**                00081391          **Period Of Approval:**      8/1/2012 - 4/30/2017

**Project Team**  **Project Lead:**                        Donnalee Ann Grey-Farquharson
**Budget Analyst:**                    Christine Evanchek
**Production Manager:**            Lloyd Fate Hemingway
**Senior Project Advisor:**        Gina-Qian Yang Cheung
**Production Manager:**
**Production Manager:**

**Proposal #:**  no data

**Description:**  In each year of this project SRO will maintain the programmed MtF web surveys, including making up to ten changes to each programmed Web survey each year.  Once tested by SRO, all programmed Web surveys will be tested by the Principal Investigator and her staff before being released. In years 1 and 2, after testing is complete, SRO will manage the Web survey data collection. In years 3 through 5, after testing is complete, the surveys will be released to the MtF staff for fielding – in years 3 through 5 SRO staff will have no involvement in the implementation of data collection. For all years after the data collections are completed, SRO will assist with the updating of the data dictionaries and other documentation.

Starting during Year 2 data collection, we will do Winter Location and Nonresponse. Calling for the web survey implementation portion of the survey. This is in addition to the normal Panel Winter Location/Nonresponse that SRO routinely handles. SRO will field the pilot survey in 2014 with forms 1, 6, and 2. MTF staff will provide a participant list and SRO will set up the participant list and provide programming production support.

Deliverables include the programmed Web Surveys, Data Dictionary, Test Dataset, Documentation of the Instruments, and Survey datasets

SRO involvement will commence in the Fall of 2012 and will continue through April of 2017.

Monitoring budget against the budget for the first two years 2012 - 2014
_____

Year 3 of the project began August 2015 and the budget has been redone to reflect future effort:

|  | TOTAL | YEAR 1 | YEAR 2 |
|---|---|---|---|
| TOTAL DIRECT COSTS | $243,829 | $195,210 | $48,619 |
| INDIRECT COSTS | $134,105 | $107,365 | $26,740 |
| GRAND TOTAL | $377,934 | $302,575 | $75,359 |

The MPR budget will be updated to reflect total cost of effort moving forward and not total cost over all years..

12/6/2016 We are now entering Year 3 of the project and the budget has been updated to reflect the change in scope.

**SRO Project Period**  08/2012 - 08/2017
**Data Col Period**  04/2016 - 08/2016
**Security Plan**  Yes

**Milestone Dates**

| | | |
|---|---|---|
| **PreProduction Start:** | | **Pretest Start:** |
| **Pretest End:** | | **Recruitment Start:** |
| **Staffing Completed:** | | **GIT Start:** |
| **SS Train Start:** | | **SS Train End:** |
| **DC Start:** | | **DC End:** |

**Other Project Team Members:**  Gina-Qian Yang Cheung, Donnalee Grey-Farquharson, Hueichun Peng, Andrew Piskorowski (years 1 & 2), (Aaron Pearson - year 1), Max Malhotra (Years 1, 2) Lloyd Hemingway, Shaowei Sun (year 3 only), Jennie Williams, Peter Sparks, Dave Dybicki

| | |
|---|---|
| **Other Project Names:** | MTF Web |
| **Sample Mgmt Sys** | SMS; Illume |
| **Data Col Tool** | NA |
| **Hardware** | NA |
| **DE Software** | N/A |
| **QC Recording Tool** | N/A |
| **Incentive** | Yes, Other (Managed by SRC Study Staff) |
| **Administration** | NA |
| **Payment Type** | N/A |
| **Payment Method** | N/A |

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| | | | |
|---|---|---|---|
| **Report Period** | Mar, 2017 (MTF-WPSP Year 2/MTF Illu | **Project Phase** | Implementing |
| *Risk Level* | *Not Rated* | | |

**Monthly Update**

03/2017
Programming and testing of all 6 forms. Programming and integrated testing of all 3 systems and email and text. IRB amendment was submitted only recently by study staff - If IRB approval is not granted by 3/31/2017 production will be delayed by at least one week.

02/2017
Programming and testing continued on Forms - 3 Forms are now programmed and are being tested. SMS programming is in progress and testing has begun - Text messaging will be integrated to work from the SMS. Integrated Systems testing (RLM RIMS, Illume, and SMS) will begin March 8th. Test sample has been received from Study Staff. We are investigating QR codes.

01/2017
Programming and testing of the Forms is still in progress. MTF Web is gearing up for winter location - with reduced sample we do not foresee a great number of hours will be needed - we will train together with Main MTF and share Interviewers for winter location. Charges and costs will be divided between the 2 MTF studies.

The survey Illume survey was closed 11/23/2016 at ~5:00 p.m. Data and paradata will be delivered in December.

Programming has begun for 2017 and the Tech Team Lead is in touch with Arialink and Illume to ensure the software programs have the flexibility to meet the needs of MTF Web.

The increased budget due to the change in scope has been approved. The new scope adds texting as a mode of communication and Winter location activities for 2017.

Below are work scope changes that have contributed to cost variance:

 Illume.Next has changed the survey engine for ease of mobile deployment by using Asp.Net single page application, AngularJS and JQuery. With this change, there is expected to be some re-write work with the JavaScript function we developed for MTF on Illume 5.1 platform. Also, as Illume.Next has its own mobile style-sheet for mobile platform, with the fact that MTF will need to create customize mobile display on certain pages and questions like Respondent Contact page, we will need create a mobile style sheet that works with Illume.Next without interfering with the original functions in Illume.Next.

2. MTF is expected to contact Respondents via Text messages as reminder. We will set up modules to send out text vix Arealink. Addition, we plan to set up a technical interface to receive/import the *replying/incoming* text messages from Arealink. SRO has not done anything with this function. We will need work with Arealink and CMT to create the programming module and set this up in a secure manner.

3. Due to data spread across different systems and database (CRIMS, RLM, SMS, Web SMS, Illume). We need more QC reporting and robust reconciliation between the systems to make sure the interface work correctly. This work scope will involve work in Web SMS, SQL DB Procedure (to reconcile as batch) and daily reporting (QC) work (SAS and SQL Server).

**Special Issues**

**Cost**
**Feb 28, 2017**

| | |
|---|---|
| *Total Cost to Date (Direct + Indirect):* | 364,992.15 |
| *Estimated Cost at Completion (E$AC):* | 432,334.08 |
| *Total Budget:* | 435,158.00 |
| *Variance (Budget minus E$AC):* | 2,823.92 |
| *Reason For Variance:* | |

**Projections**
**Feb 28, 2017**

| | |
|---|---|
| *Dollars Projected For Month:* | 27,233.87 |
| *Actual Dollars Used:* | 32,111.27 |
| *Variance (Projected minus Actual):* | -4,877.40 |
| *Reason For Variance:* | |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| *Current Goal:* | | | |
| *Goal at Completion:* | | | |
| *Current actual:* | | | |
| *Estimate at Complete:* | | | |
| *Variance:* | | | |

**Other Measures**

| | |
|---|---|
| **Project Name** | MTF Base Year Tablet Pilot (MTF Tablet Pilot) |
| **Project Mode** | Primary: Class SAQ      Total of Modes: 1 |
| **Project Type** | Sponsored Projects |

**Project Status**   Current

| | | | | | |
|---|---|---|---|---|---|
| **Budget** | *Direct Budget:* | 461,821.00 | *InDirect Budget:* | 254,002.00 | *Total Budget:*   715,823.00 |

| | |
|---|---|
| **Principal Investigator/Client** | Richard Miech (UM-SRC) |
| **Funding Agency** | National Institute on Drug Abuse (NIDA).  Fall 2015-only budget, direct: $67,163.00; Indir:$36,940.00; Total:$104,103.00 |

**IRB**          *HUM#:*          HUM00112493      *Period Of Approval:*      3/1/2017 - 2/28/2018

**Project  Team**      *Project Lead:*          Meredith A House
*Budget Analyst:*          Christine Evanchek
*Production Manager:*      Barbara Aghababian-Homburg
*Senior Project Advisor:*    Stephanie A Chardoul
*Production Manager:*
*Production Manager:*

| | |
|---|---|
| **Proposal #:** | no data |
| **Description:** | The fall 2015 and spring 2016 tablet pilots will test the feasibility of moving from paper Scantron forms to a tablet-based application for the administration of MTF Base Year data collection.  Two forms of 8th/10th grade MTF survey and two forms of the 12th grade MTF survey will be administered in two schools in the fall pilot and in eight schools in the spring pilot. |
| **SRO Project Period** | 06/2015 - 08/2017 |
| **Data Col Period** | 10/2015 - 05/2017 |
| **Security Plan** | Yes |

**Milestone Dates**

| | | | |
|---|---|---|---|
| *PreProduction Start:* | 02/16/2017 | *Pretest Start:* | |
| *Pretest End:* | | *Recruitment Start:* | |
| *Staffing Completed:* | | *GIT Start:* | |
| *SS Train Start:* | 03/30/2017 | *SS Train End:* | 04/06/2017 |
| *DC Start:* | 04/04/2017 | *DC End:* | 05/23/2017 |

| | |
|---|---|
| **Other Project Team Members:** | David Bolt (Technical Systems/Help desk), Lawrence Daher (Technical Systems/Help desk), Minako Edgar (Data Manager), Kyle Kwaiser (Technical Systems Lead/Data Manager), Paul Schulz (Survey Programmer), Marsha Skoman (App programmer), Pam Swanson (Survey Programmer), Daric Thorne (SSA). Note: Mike Nugent (SSL) is the field researcher for fall 2015.  2016-2017, MTF field staff will serve as FRs. |
| **Other Project Names:** | MTF Fall 2015 Tablet Pilot  MTF Spring 2016 Tablet Pilot  MTF Spring 201 Tablet Pilot |
| **Sample Mgmt Sys** | SurveyTrak |
| **Data Col Tool** | Other (SurveyCTO; custom) |
| **Hardware** | Laptop; Tablet |
| **DE Software** | Other (Google Form) |
| **QC Recording Tool** | N/A |
| **Incentive** | Yes, R; Yes, Other (Schools) |
| **Administration** | SRO Group |
| **Payment Type** | Check, prepaid ($1,000 (fall 2015 schools only)); Check, post ($500 or $1000 (2016-2017 schools)); Cash, post |
| **Payment Method** | Check through other system (Rpay spreadsheet); Imprest Cash Fund from ISR Business Office (Rpay spreadsh |

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| | | | |
|---|---|---|---|
| **Report Period** | Mar, 2017 (MTF Tablet Pilot) | **Project Phase** | Implementing |
| *Risk Level* | *On Track* | | |

**Monthly Update**      In March:
Fall 2016 data deliverables still need to be reviewed by Meredith, after which they will be delivered.

We continued work in all of the areas below in preparation for spring admins:

- Survey Wrapper App:  Finalized development and testing. Sign off on final app 3/17
- Revisit SHApp Encrypt. Preload: Finalized development and testing. Sign off on final app 3/17
- Shapp WiFi improvements: Finalized development and testing. Sign off on final app 3/17
- Inventory and shipping logistics (Pull from Strak-for scheduling): we will continue with our Access database for

spring '17
•    Additional Form programming: Finalized programming and testing. Sign off on final instruments 3/21
•    Hardware: Hired 2 full-time temps for 2 weeks at the end of March for tablet set-up (~1040 new tablets, ~320 "old" tablets), ~500 new tablets software updates only, training tablet prep/mailing, cart shipping, tablet kitting and shipping, and materials work.
•    G148 is fully set-up and functioning for tablet/hardware storage, set-up, packaging, inventory, etc.
•    Received and implemented the last of our supply orders including custom foam for tablet totes,  accessories bags, crates, etc.  We have a more robust tote and have reduced the weight by 4 lbs (down to 16 lbs per tote), but with fewer tablets per tote (20 instead of 30).  Found 1 new cart model to try in addition to the "milk crate."
•    Training - we have 12 lead FRs and 28 helpers.  Training calls were held March 30 and 31.  There will be a make-up training call on April 6.
•    Data collection - FRs continued contacting and pre-admin visits with their schools.  We have admin dates for 14 of 15 schools. The earliest is 4/4, the latest is 5/23.  Will assign dates for travel to schools for observation to team members early April.

**Special Issues**

**Cost**
**Mar 31, 2017**

| | |
|---|---|
| *Total Cost to Date (Direct + Indirect):* | 616,634.02 |
| *Estimated Cost at Completion (E$AC):* | 942,434.96 |
| *Total Budget:* | 715,823.00 |
| *Variance (Budget minus E$AC):* | -226,611.96 |

*Reason For Variance:*    Projections include:
    SO#:14-0047R01S2 (additional form programming)
    SO#:17-0037 (purchase of an additional 760 tablets)
    SO#:14-0047R01S3 (spring 2017 pilot work through 4/30/2017)

The budget includes the dollars for the purchase of the additional tablets

Due to original underrun on MTF Tablet, the budget DOES NOT include:
    the additional form programming budget or the spring 2017 pilot work budget

Current 5-year grant ends 4/30/2017.  New grant will be established and remaining spring 2017 costs and budget will be updated.  SRO is working closely with Nick P on budgets/costs.

**Projections**
**Mar 31, 2017**

| | |
|---|---|
| *Dollars Projected For Month:* | 60,375.03 |
| *Actual Dollars Used:* | 67,791.00 |
| *Variance (Projected minus Actual):* | -7,415.97 |

*Reason For Variance:*    Some non-sal costs that were projected for April hit in March.  April projections have been adjusted.

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| *Current Goal:* | | | |
| *Goal at Completion:* | | | |
| *Current actual:* | | | |
| *Estimate at Complete:* | | | |
| *Variance:* | | | |

**Other Measures**

| | |
|---|---|
| **Project Name** | National Survey of Family Growth (NSFG 2010-2020) |
| **Project Mode** | Primary: Face to Face    Total of Modes: 1 |
| **Project Type** | Sponsored Projects       **Project Status**  Current |

**Budget**    ***Direct Budget:***  32,653,126.47    ***InDirect Budget:***  8,448,262.00    ***Total Budget:***  41,101,388.47

| | |
|---|---|
| **Principal Investigator/Client** | Joyce Abma (NCHS)<br>Mick Couper (ISR) |
| **Funding Agency** | NCHS, CDC, NICHD |

**IRB**    ***HUM#:***    0002716    ***Period Of Approval:***  7/17/13 - 7/17/17

**Project Team**
| | |
|---|---|
| ***Project Lead:*** | Heidi Marie Guyer |
| ***Budget Analyst:*** | Nancy Oeffner |
| ***Production Manager:*** | Theresa Camelo |
| ***Senior Project Advisor:*** | Mary P Maher |
| ***Production Manager:*** | Maureen Joan O'Brien |
| ***Production Manager:*** | Rebecca Loomis |

**Proposal #:**  no data

**Description:**  The NSFG is a national survey of women and men 15-49 years of age designed to provide national estimates of factors affecting pregnancy and birth rates, including sexual activity, cohabitation, marriage, divorce, contraceptive use, miscarriage and stillbirth, infertility, and use of medical services for family planning and infertility.  NSFG 2010-2020 includes eight years of continuous data collection starting in September 2011 and ending in 2019.  Every year, new PSUs will be selected to replace last year's non-self representing PSUs and self-representing PSUs, and the project will continue to collect data from a set of major self representing PSUs throughout the entire data collection period. Target number of interviews is approximately 5000 per year.

| | |
|---|---|
| **SRO Project Period** | 09/2010 - 07/2020 |
| **Data Col Period** | 09/2011 - 06/2019 |
| **Security Plan** | Yes |

**Milestone Dates**

| | | | |
|---|---|---|---|
| ***PreProduction Start:*** | 03/01/2011 | ***Pretest Start:*** | |
| ***Pretest End:*** | | ***Recruitment Start:*** | 06/01/2011 |
| ***Staffing Completed:*** | 08/17/2011 | ***GIT Start:*** | 09/13/2011 |
| ***SS Train Start:*** | 09/15/2011 | ***SS Train End:*** | 09/19/2011 |
| ***DC Start:*** | 09/20/2011 | ***DC End:*** | 07/01/2019 |

| | |
|---|---|
| **Other Project Team Members:** | Chrissy Evanchek--Budget Analyst |
| **Other Project Names:** | |
| **Sample Mgmt Sys** | SurveyTrak |
| **Data Col Tool** | Blaise 4.8 |
| **Hardware** | Tablet; [UM cell] Phone; Paper and Pencil |
| **DE Software** | NA |
| **QC Recording Tool** | N/A |
| **Incentive** | Yes, R; Yes, Other (babysitting fee) |
|    **Administration** | SRO Group |
|    **Payment Type** | Cash, prepaid ($5; $40); Cash, post ($40; $60) |
|    **Payment Method** | Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office |

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| | |
|---|---|
| **Report Period** | Mar, 2017 (NSFG 2010-2020)    **Project Phase**  Implementing |
| *Risk Level* | *On Track* |

**Monthly Update**  The Screener Completion rate remains low this quarter (Q23).  This could in part be due to higher Eligibility Rates the last three quarters creating more eligible sample to work.  Main yield is slightly above average for this quarter this cycle.  We finished Q22 with a lower than usual Response Rate, and the overall cumulative RR has dropped to 70%.  This has been a concern to the NSFG Production team.  NCHS does not seem as concerned with the Response Rate as NSFG continues to lead all NCHS sponsored projects in RR.  Of the 18 NH's from January, 4 have attritted leaving 4 unstaffed areas.  We are currently traveling Interviewers to unstaffed areas for coverage.  Initial questionnaire specs for year 7 were provided to SRO in February. Final questionnaire specs were delivered early April 2017, and Blaise program changes were made.  NCHS is currently testing the changes.  Sign-off for the final Y7 Blaise instrument will

be June 30th, 2017.  Then, SRO will prepare mock interviews for the Y7 training.   The Paper Screener experiment will begin Q24.  Paper screeners will be sent to 300 households per quarter from sample that we expect would not be eligible.  The phase boundary experiment still has not been submitted by NCHS to their ERB.  NCHS and Michigan are gearing up for the late August 2017 Interviewer training and expect to train approximately 40 Interviewers.  CDC/OPM is now requiring that all NSFG staff requiring security checks be digitally fingerprinted.  SRO will work with Field Print, a company that contracts with OPM for digital fingerprinting.  We are in the process of determining the most efficient and cost effective mode, either having newly hired Interviewers fingerprinted in their own areas, or traveling in a Field Print representative to fingerprint Interviewers all at once.  We continue to test and fine tune the Electronic Document Utility (EDU) in SurveyTrak for signing receipt forms and consent forms.  We expect to sign off on this sometime early May and conduct a phone training for interviewers.

**Special Issues**

Budgets are being prepared for NCHS for additional year 6 costs. NCHS plans to allocate $800,535 in additional funding for the current year (through August 2017).

**Cost**
**Mar 10, 2017**

| | |
|---|---|
| *Total Cost to Date (Direct + Indirect):* | 28,465,778.87 |
| *Estimated Cost at Completion (E$AC):* | 43,014,304.33 |
| *Total Budget:* | 41,101,388.47 |
| *Variance (Budget minus E$AC):* | 1,902,374.86 |
| *Reason For Variance:* | Additional workscope, higher than anticipated HPI, higher yield, higher interviewer attrition. |

**Projections**
**Mar 10, 2017**

| | |
|---|---|
| *Dollars Projected For Month:* | 481,268.57 |
| *Actual Dollars Used:* | 501,182.25 |
| *Variance (Projected minus Actual):* | 19,913.68 |
| *Reason For Variance:* | |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| *Current Goal:* | 420 | 57% | 9.0 |
| *Goal at Completion:* | 1330 | 79% | 9.0 |
| *Current actual:* | 437 | 51.6% | 10.2 |
| *Estimate at Complete:* | 1260 | 61.8% | 10.2 |
| *Variance:* | 70 | 18.2% | 1.2 |

**Other Measures**

The goals represent Q23 goals and actuals.  We are now in Week 5 of Quarter 23.

| | |
|---|---|
| **Project Name** | Neurodevelopmental Pathways in Adolescent Health Risk Behavior (AHRB) |
| **Project Mode** | Primary: Class SAQ    Secondary: Web    Total of Modes: 2 |

| **Project Type** | Sponsored Projects | | **Project Status** | Current |
|---|---|---|---|---|

| **Budget** | **Direct Budget:** 919,405.00 | **InDirect Budget:** 507,595.00 | **Total Budget:** 1,427,000.00 |
|---|---|---|---|

**Principal Investigator/Client**   Daniel Keating (U-M SRC)

**Funding Agency**   Health and Human Services (HHS), Department of-National Institutes of Health

**IRB**   **HUM#:**   HUM00084650   **Period Of Approval:**   2/3/2016 - 2/2/2017

**Project Team**

| | |
|---|---|
| **Project Lead:** | Peter Rakesh Batra |
| **Budget Analyst:** | Dean E Stevens |
| **Production Manager:** | |
| **Senior Project Advisor:** | Stephanie A Chardoul |
| **Production Manager:** | Meredith A House |
| **Production Manager:** | |

**Proposal #:**   no data

**Description:**   During early adolescence systems in the brain that are characterized by heightened reactivity to motivational stimuli and rewards mature rapidly, while systems that enable more effective cognitive control and judgment mature more slowly. This "developmental maturity mismatch" has been proposed as a key contributor to health risk behavior among adolescents, which is of critical importance because: (1) risk behaviors are the leading cause of morbidity and mortality in this age group, including diseases arising from unprotected sexual activity and casualties arising from reckless behavior (including driving fatalities and serious injuries); (2) it is the peak age for the onset of a wide range of risk behavior patterns with potential long-term consequences, including substance use and abuse, and delinquency.  The "developmental maturity mismatch" hypothesis, however, has not been directly tested in relation to risk behavior at a level sufficient to inform this critical health area. The primary aim of the ANDH study is to understand the behavioral, cognitive, and neural bases of risk taking, through integrated analyses of age differences, developmental trajectories, and individual differences in psychosocial, neurocognitive and neural imaging assessments.

The study will involve data collection from 10th and 12th grade students (~2000 students total) in 7-8 local high schools (approximately 150 students from each age group per school), with group administration in the schools using laptops in a baseline data collection to be completed over a 3-month period in the fall of 2014. Each respondent will attend 2 ~45 minute sessions: one survey and one neurocognitive tests.  After the baseline data collection, SRO will modify the survey questionnaire to operate as a web-based survey, and will administer the web survey to all 2,000 respondents in years 2, 3, and 4 of the project (in the fall of 2015, 2016 and 2017).  A small number of respondents (150-160) will be sub-selected to undergo neural imaging at U-M facilities in Ann Arbor (SRO will not be directly involved in this portion of the study).

**SRO Project Period**   04/2014 - 03/2018

**Data Col Period**   03/2015 - 01/2016

**Security Plan**   Yes

**Milestone Dates**

| | | | |
|---|---|---|---|
| **PreProduction Start:** | | **Pretest Start:** | 12/21/2016 |
| **Pretest End:** | 01/03/2017 | **Recruitment Start:** | |
| **Staffing Completed:** | | **GIT Start:** | |
| **SS Train Start:** | | **SS Train End:** | |
| **DC Start:** | 09/01/2016 | **DC End:** | 05/31/2018 |

**Other Project Team Members:**   Wave 2 Team: Kyle Kwaiser (tech lead, data manager), Kathy LaDronka, Becky Loomis, Dolorence Okullo (data management), Hueichun Peng, Shaowei Sun
Wave 1 Team: Larry Daher, Emmanuel Ellis, David Bolt, Kyle Goodman, Donnalee Grey-Farquharson, Kyle Kwaiser (tech lead, data manager), Becky Loomis, Max Malhotra, Shaowei Sun, Laura Yoder (data management)

| | |
|---|---|
| **Other Project Names:** | Adolescent Neurodevelopmental Health (ANDH) (Internal)<br>Adolescent Health Risk Behavior Study (Public) |
| **Sample Mgmt Sys** | Illume; Project specific system (SRIS) |
| **Data Col Tool** | Illume; SAQ; Other (Inquisit neurocognitive task software; NC helper app) |
| **Hardware** | Laptop |
| **DE Software** | Other (SRIS) |
| **QC Recording Tool** | N/A |
| **Incentive** | Yes, R; Yes, Other (School) |
| **Administration** | SRO Group; ISR Group (Dan Keating, PNG Group) |
| **Payment Type** | Check, post (Rs, $50 year 1, $20 years 2-4; schools, $1000); Cash, post (Ypsilanti Rs, $50 year 1) |
| **Payment Method** | Check through other system (RPay not through STrak (R payments)); Imprest Cash Fund from ISR Business Of |

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| | | | |
|---|---|---|---|
| **Report Period** | Mar, 2017 (AHRB) | **Project Phase** | Implementing |

**Risk Level**     *On Track*

**Monthly Update**

March was a fabulous month for the AHRB Project. Response rate has risen to 36%, the IRB amendment to add social media (Facebook) as one of the ways to contact respondents was approved, at the PI's request we have increased the sample size by 79 respondents by adding in those respondents who completed the survey in Wave 1 (but not the Neurocognitive tasks), and we have successfully mailed the (wave 2) Pre-Notification Letter to approx. 1500 participants (Release 2 & 3) .

During the month, we completed the sending of the 3rd reminder email and now the PI's team of grad students is beginning to phone non-responders. Once we have exhausted all other avenues of contact, we are also preparing for this team to search for participants on Facebook. Also during the month, we have automated the procedure of producing weekly status/response rate reports. We continue to send checks to respondents every other week.

**Special Issues**

**Cost**
**Mar 31, 2017**

| | |
|---|---|
| *Total Cost to Date (Direct + Indirect):* | 1,121,234.04 |
| *Estimated Cost at Completion (E$AC):* | 1,505,387.98 |
| *Total Budget:* | 1,427,000.00 |
| *Variance (Budget minus E$AC):* | -78,387.98 |
| *Reason For Variance:* | This potential over run includes projections for incentives corresponding to very high estimated W2 and W3 RR (70% and 65%). Once we have more data for RR's from this wave (W2) these will be updated in discussions with the PI's. At this stage I don't think this is cause for concern since there are many scenarios being considered that will bring us back in line with a balanced budget. |

**Projections**
**Mar 31, 2017**

| | |
|---|---|
| *Dollars Projected For Month:* | 0.00 |
| *Actual Dollars Used:* | 0.00 |
| *Variance (Projected minus Actual):* | 0.00 |
| *Reason For Variance:* | |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| *Current Goal:* | | | |
| *Goal at Completion:* | | | |
| *Current actual:* | | | |
| *Estimate at Complete:* | | | |
| *Variance:* | | | |

**Other Measures**

| Project Name | Optimizing Youth Suicide Risk Screening and Triage In the Emergency Department (YRS) |
|---|---|
| Project Mode | Primary: Telephone      Total of Modes: 1 |
| Project Type | Sponsored Projects                **Project Status**   Current |

**Budget**     *Direct Budget:*    1,276,181.00     *InDirect Budget:*   703,064.00     *Total Budget:*   1,979,245.00

**Principal Investigator/Client**    Cheryl King (Professor of Psychiatry, University of Michigan)

**Funding Agency**

**IRB**      *HUM#:*                *Period Of Approval:*

**Project Team**

| | |
|---|---|
| *Project Lead:* | Esther H Ullman |
| *Budget Analyst:* | Janelle P Cramer |
| *Production Manager:* | |
| *Senior Project Advisor:* | Kirsten Haakan Alcser |
| *Production Manager:* | |
| *Production Manager:* | |

**Proposal #:**    no data

**Description:** This multi-site collaborative project proposes to implement a "universal suicide risk screen" strategy with eligible youths, ages 12-17, who present at one of 14 emergency departments across the country. The research team will conduct initial screening of approximately 9,090 youths randomly chosen in these emergency departments (ED), over a period of two years. Based on the results of the screening, youths will be contacted for follow-up (youths who present with an actual suicide or self-injury concern, youths who present with at least two suicide risk factors, and youths at low/no risk for suicide) by the Survey Research Center's (SRC) interviewing staff in Survey Research Operations (SRO). SRO will receive electronic files with contact information for the selected youths on a flow basis, with the expectation of receiving approximately 4,360 in total. Using computer-assisted interviewing techniques from our centralized telephone facility (Survey Services Lab, or SSL) on the Ann Arbor campus, we will attempt contact with each selected respondent's parent and then the respondent, with the goal of completing brief (10-minute) interviews with ~85% of the respondents 3 months after their ED screening, and ~80% of these same respondents 6 months after their ED screening

| | |
|---|---|
| **SRO Project Period** | 03/2015 - 12/2017 |
| **Data Col Period** | 07/2015 - 07/2017 |
| **Security Plan** | NA |
| **Milestone Dates** | |

| | | | |
|---|---|---|---|
| *PreProduction Start:* | | *Pretest Start:* | |
| *Pretest End:* | | *Recruitment Start:* | |
| *Staffing Completed:* | | *GIT Start:* | |
| *SS Train Start:* | 09/21/2015 | *SS Train End:* | 09/24/2015 |
| *DC Start:* | 09/28/2015 | *DC End:* | |

| | |
|---|---|
| **Other Project Team Members:** | |
| **Other Project Names:** | |
| **Sample Mgmt Sys** | SMS |
| **Data Col Tool** | NA |
| **Hardware** | Desktop |
| **DE Software** | NA |
| **QC Recording Tool** | NA |
| **Incentive** | Yes, Other (Amazon gift card (Project staff)) |
| **Administration** | NA |
| **Payment Type** | NA |
| **Payment Method** | NA |

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| | | | |
|---|---|---|---|
| **Report Period** | Mar, 2017 (YRS) | **Project Phase** | Implementing |

*Risk Level*      *On Track*

**Monthly Update**    We are slowing wrapping up Study 1 completing the last few 6 month inteviews, with the last case expiring April 9th. We will then "pause" activity (except some planning) until mid-summer.

**Special Issues**

**Cost**
**Mar 31, 2017**

| | |
|---|---|
| *Total Cost to Date (Direct + Indirect):* | 947,165.85 |
| *Estimated Cost at Completion (E$AC):* | 1,972,261.52 |
| *Total Budget:* | 1,979,245.00 |
| *Variance (Budget minus E$AC):* | 6,983.48 |
| *Reason For Variance:* | Not all details for Study 2 are finalized so leaving some funds unallocated if needed for programming, training, etc. |

**Projections**
**Mar 31, 2017**

| | |
|---|---|
| *Dollars Projected For Month:* | 37,062.95 |
| *Actual Dollars Used:* | 37,184.80 |
| *Variance (Projected minus Actual):* | -121.85 |
| *Reason For Variance:* | |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| *Current Goal:* | 3331 | 85% | 3.0 |
| *Goal at Completion:* | 4200 | 85% | 3.0 |
| *Current actual:* | 3847 | 69% | 1.3 |
| *Estimate at Complete:* | | 70% | |
| *Variance:* | | | |

**Other Measures**    There will actually be two surveys in phase 1 (at 3 months and 6 months)...and then a second phase survey.

| | |
|---|---|
| **Project Name** | PSID Wellbeing (PSID-WB) |
| **Project Mode** | Primary: Mixed     Total of Modes: 3 |
| **Project Type** | Sponsored Projects         **Project Status**   Current |
| **Budget** | ***Direct Budget:***   455,760.00     ***InDirect Budget:***   250,668.00     ***Total Budget:***   706,428.00 |
| **Principal Investigator/Client** | Vicki Freedman (UM-SRC) |

| | |
|---|---|
| **Funding Agency** | National Institute on Aging |
| **IRB** | ***HUM#:***     HUM00109415     ***Period Of Approval:***    1/21/16 - 1/20/17 |
| **Project Team** | ***Project Lead:***       Rachel Anne LeClere |
| | ***Budget Analyst:***       William Lokers |
| | ***Production Manager:***       Derek Dubuque |
| | ***Senior Project Advisor:***       Stephanie A Chardoul |
| | ***Production Manager:*** |
| | ***Production Manager:*** |

| | |
|---|---|
| **Proposal #:** | no data |
| **Description:** | Panel Study of Income Dynamics (PSID)—Wellbeing and Daily Life Study is part of the Panel Study of Income Dynamics – a national, longitudinal study of families started in 1968. The study is the second Mixed-Mode, Web/Mail study carried out on the PSID Suite. The sample for PSID-Wellbeing and Daily Life Study is comprised of the majority of PSID respondents and spouses and includes approximately 10,784 individuals.  Respondents are invited either complete an on-line or on paper. When initially invited to participate, potential respondents were assigned to the Web Group or the Choice Group, based upon analysis done of past data to predict which mode the respondents were most likely to complete. Follow-up efforts have consisted of both hard-copy and e-mailed reminders as well as non-response reminder calling.  The interview content includes questions about wellbeing, personality traits, and every day skills and will allow researchers to better understand the wellbeing of America's families and how it is influenced by health, economic status, and family circumstances |
| **SRO Project Period Data Col Period** | 10/2015 - 09/2016 |
| **Security Plan** | NA |

**Milestone Dates**

| | |
|---|---|
| ***PreProduction Start:*** | ***Pretest Start:*** |
| ***Pretest End:*** | ***Recruitment Start:*** |
| ***Staffing Completed:*** | ***GIT Start:*** |
| ***SS Train Start:*** | ***SS Train End:*** |
| ***DC Start:*** | ***DC End:*** |

| | |
|---|---|
| **Other Project Team Members:** | Rachel LeClere - Project Manager |
| | Emily Blasczyk--Data Manager and Report Programmer |
| | Hueichun Peng--Custom Project SMS Programmer |
| | Donnalee Grey-Farquharson--Custom Project SMS Design/Specifications |
| | Max Malhotra--Illume Programmer |
| | Alexander Hernandez--Illume Programmer |
| | Stefanie Skulsky - Project Assistant |
| | Tony Romanowski - Materials and Training Developer |
| **Other Project Names:** | PSID Web/Mail 2016 |
| | FES Wellbeing and Daily Life |
| **Sample Mgmt Sys** | Web SMS |
| **Data Col Tool** | Illume; SAQ |
| **Hardware** | Other  (R hardware) |
| **DE Software** | Illume |
| **QC Recording Tool** | DRI-CXM |
| **Incentive** | Yes, R |
|     **Administration** | ISR Group (SRC-PSID) |
|     **Payment Type** | Check, post ($20); Cash, prepaid ($5) |
|     **Payment Method** | Check through other system (PSID_RAPS) |

| | |
|---|---|
| **Report Period** | Mar, 2017 (PSID-WB)         **Project Phase**     Closing |

*Risk Level*        *Not Rated*

**Monthly Update**        No work was done this month. The upcoming month will include archiving SRO system for Wellbeing

**Special Issues**

**Cost**
**Mar 31, 2017**        ***Total Cost to Date (Direct + Indirect):***        651,410.87
        ***Estimated Cost at Completion (E$AC):***        662,614.87
        ***Total Budget:***        706,428.00
        ***Variance (Budget minus E$AC):***        0.00
        ***Reason For Variance:***

**Projections**
**Mar 31, 2017**        ***Dollars Projected For Month:***        0.00
        ***Actual Dollars Used:***        0.00
        ***Variance (Projected minus Actual):***        0.00
        ***Reason For Variance:***

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| *Current Goal:* | | | |
| *Goal at Completion:* | | | |
| *Current actual:* | | | |
| *Estimate at Complete:* | | | |
| *Variance:* | | | |

**Other Measures**

| | |
|---|---|
| **Project Name** | Social Networks and Well Being (SN&WB) |
| **Project Mode** | Primary: Face to Face     Secondary: Telephone |
| **Project Type** | Sponsored Projects |

**Project Status**   Current

| **Budget** | **Direct Budget:** | 549,753.00 | **InDirect Budget:** | 302,365.00 | **Total Budget:** | 852,118.00 |

**Principal Investigator/Client**
Kira Birdett (University of Michigan)
Karen Fingerman (University of Texas at Austin)

**Funding Agency**

| **IRB** | **HUM#:** | 2015-02-0123 | **Period Of Approval:** | 4/15/16-4/15/17 |
|---|---|---|---|---|
| **Project  Team** | **Project Lead:** | Heidi Marie Guyer | | |
| | **Budget Analyst:** | | | |
| | **Production Manager:** | Kathleen S Ladronka | | |
| | **Senior Project Advisor:** | Kirsten Haakan Alcser | | |
| | **Production Manager:** | Russell W Stark | | |
| | **Production Manager:** | Esther H Ullman | | |

**Proposal #:** no data

**Description:** SRO will screen and invite 500 adults over 65 years of age residing in Austin, TX to complete an in-person interview and follow up assessments. The primary aims of this study are to examine the effects of members of one's social network versus others encountered in terms of the quality of the relationship as well as physical, emotional and cognitive functions associated with social interactions among adults older than 65 residing in the Austin Metropolitan Statistical Area.

The screening interview will be conducted in the Survey Services Lab (SSL). The main interview will be conducted in person in the respondent's home by local field staff. The main interview will collect information on demographic characteristics, social networks, and emotional, cognitive and physical functioning including walking speed and grip strength. At the end of the main interview, the interviewer will instruct the respondent on using an Android device (smartphone) programmed with the Electronically Activated Recorder (EAR) and daily surveys (mobile-ecological momentary assessment: mEMA) as well as a microphone for the recordings and a wrist Actigraph. The interviewer will explain the instructions for each of the three monitoring systems: EAR, mEMA and the Actigraph. Participants will use the 3 devices during a 4-day (intensive) data collection period starting on a Thurs, Fri or Sat to encompass 2 weekend days and 2 weekdays. The interviewer will leave the devices and instructions with the respondent and schedule a time to return to pick them up after the 4-day period. The interviewer will also leave a self-administered paper questionnaire with the respondent. The respondent will be instructed to complete the questionnaire on their own and return it to the University of Texas.The interviewer will also be responsible for daily reminder/troubleshooting calls to the respondent.

| | |
|---|---|
| **SRO Project Period** | 01/2016 - 04/2017 |
| **Data Col Period** | |
| **Security Plan** | NA |

**Milestone Dates**

| | | | |
|---|---|---|---|
| **PreProduction Start:** | 01/01/2016 | **Pretest Start:** | |
| **Pretest End:** | | **Recruitment Start:** | 06/15/2016 |
| **Staffing Completed:** | 07/25/2016 | **GIT Start:** | 08/27/2016 |
| **SS Train Start:** | 10/17/2016 | **SS Train End:** | 10/20/2016 |
| **DC Start:** | 10/22/2016 | **DC End:** | |

| | |
|---|---|
| **Other Project Team Members:** | Karl Dinkelmann, Marsha Skoman, Lisa Quist, Holly Ackerman, Dan Zahs, Paul Burton, Grace Tison, Suzanne Hodge |
| **Other Project Names:** | Daily Experiences and Well-Being (DEWS) |
| **Sample Mgmt Sys** | SurveyTrak |
| **Data Col Tool** | Blaise 4.8; SAQ; Other (mEMA and EAR app on Android, Actical) |
| **Hardware** | Laptop; Tablet; [UM cell] Phone; Paper and Pencil; Other  (Android device, Actical device) |
| **DE Software** | NA |
| **QC Recording Tool** | DRI-CARI; Live monitoring |
| **Incentive** | Yes, R |
|    **Administration** | NA |
|    **Payment Type** | Cash, prepaid ($1); Cash, post ($50 + $100) |
|    **Payment Method** | Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office |

| | | | |
|---|---|---|---|
| **Report Period** | Mar, 2017 (SN&WB) | **Project Phase** | Implementing |

*Risk Level*  *Some Concerns*

**Monthly Update**  We have continued experience weekly problems with mEMA and will proactively test the system internally each week to see if we can discover problems before they impact the field effort.  The PI contends that they need 85% completion of mEMA surveys to have adequate data and that 50 cases don't meet this threshold.  We are discussing with them a supplement to complete another  60 cases (and go back to some who had technical problems to see if they'd try again to use devices for 5 days with additional incentives provided).

**Special Issues**  Working with PI to define the scope of additional cases they'd like completed and the associated costs for this supplemental work (above the 325 cases budgeted).

**Cost**
**Mar 31, 2017**

| | |
|---|---|
| *Total Cost to Date (Direct + Indirect):* | 739,320.69 |
| *Estimated Cost at Completion (E$AC):* | 871,052.08 |
| *Total Budget:* | 852,118.00 |
| *Variance (Budget minus E$AC):* | -18,934.08 |
| *Reason For Variance:* | We received additional funding from the PI for projected overruns to complete 325 cases and the budget here reflects this new amount. |

**Projections**
**Mar 31, 2017**

| | |
|---|---|
| *Dollars Projected For Month:* | 92,476.18 |
| *Actual Dollars Used:* | 81,252.86 |
| *Variance (Projected minus Actual):* | 11,223.32 |
| *Reason For Variance:* | Tech Team and ST's used less hours than projected. |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| *Current Goal:* | 350 | | 10.0 |
| *Goal at Completion:* | 325 | | 8.8 |
| *Current actual:* | 290 | .43 | 10.3 |
| *Estimate at Complete:* | 325 | | |
| *Variance:* | | | |

**Other Measures**  Goal: Identify 500 eligible respondents via telephone screener, 350 agree to complete interview, 300 complete main interview and all additional components (EAR, mEMA, Actical) for full duration.

| | |
|---|---|
| **Project Name** | Stress and Wellbeing in Everyday Life (SWEL) |
| **Project Mode** | Primary: Face to Face    Secondary: Observation    Total of Modes: 2 |
| **Project Type** | Sponsored Projects                    **Project Status**  Current |
| **Budget** | **Direct Budget:**  441,062.00    **InDirect Budget:**  242,585.00    **Total Budget:**  683,647.00 |
| **Principal Investigator/Client** | Kira Birditt (UM ISR Life Course Development) <br> Toni Antonucci (UM ISR Life Course Development) |

**Funding Agency**

| | |
|---|---|
| **IRB** | **HUM#:**    TBD        **Period Of Approval:**    TBD |
| **Project Team** | **Project Lead:**        Piotr Dworak <br> **Budget Analyst:**      Janelle P Cramer <br> **Production Manager:**    Derek Dubuque <br> **Senior Project Advisor:**  Kirsten Haakan Alcser <br> **Production Manager:** <br> **Production Manager:** |
| **Proposal #:** | no data |
| **Description:** | SWEL is a study to assess the role of cardiovascular stress in daily lives among matched test and control groups of ethnic minority and white respondents.  Data collected via an interviewer-administered 30-min instrument, followed by a 4-day measurement of cardiovascular activity using a wearable biometric device, and 6-per-day self-administered momentary assessments. <br><br> Data collection goal:  300 CAPI interviews (79% RR on sample of ~380), revised to test/control setup in which 150 interviews are needed from 173 test subjects (87% RR) and 150 interviews from the 307 control subjects (48% RR). <br><br> Sample:  Participants in Wave 3 of Social Relations (2014) from the Detroit tri-county area. <br><br> Data collection period: estimated for 13 weeks but both the staffing levels and the proposed data collection pace is being discussed with the client given the availability of the wereable devices. |
| **SRO Project Period** | 12/2016 - 10/2017 |
| **Data Col Period** | 06/2017 - 09/2016 |
| **Security Plan** | NA |

**Milestone Dates**

| | | | |
|---|---|---|---|
| **PreProduction Start:** | 03/01/2017 | **Pretest Start:** | 09/24/2017 |
| **Pretest End:** | 09/28/2017 | **Recruitment Start:** | 07/14/2017 |
| **Staffing Completed:** | 09/22/2017 | **GIT Start:** | 07/10/2017 |
| **SS Train Start:** | 10/02/2017 | **SS Train End:** | 10/05/2017 |
| **DC Start:** | 10/08/2018 | **DC End:** | 02/04/2018 |

| | |
|---|---|
| **Other Project Team Members:** | |
| **Other Project Names:** | Racial Disparities in Health: The Roles of Stress, Social Relations, and the Cardiovascular System |
| **Sample Mgmt Sys** | MSMS |
| **Data Col Tool** | Blaise 4.8; Blaise 5 |
| **Hardware** | Laptop |
| **DE Software** | NA |
| **QC Recording Tool** | Camtasia |
| **Incentive** | Yes, R |
| **Administration** | SRO Group |
| **Payment Type** | Cash, prepaid (2); Cash, post (30); Other  (Cash post biomarker) |
| **Payment Method** | Check through other system (MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (MSMS) |

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| | |
|---|---|
| **Report Period** | Mar, 2017 (SWEL)              **Project Phase**    Implementing |
| **Risk Level** | *On Track* |
| **Monthly Update** | SWEL Pilot has not yet been launched.  The pilot is organized by the client's team and will include UM ISR lab tests with 40 participants followed by a 4-day self-administered measurements using the biometric equipment + momentary |

ecological assessment (EMA). The main hold up is due to finalizing contract agreements to lease Preventice BodyGuardian - the core wearable biometric device used in the SWEL study.

Tentative start of main data collection was re-scheduled from June to July -- will be revisited in mid-April.

SRO main involvement this month included finishing programming of Blaise 5 online EMA surveys and integration testing with MSMS.

We are also refining the data collection projections:
- we discussed phased sample launch (approaches to releasing control and test samples)
- we have presented the client with a more realistic 25-week scenario given the number of devices available.
- the client is willing to invest in additional devices and we have to plan the target # of interviews per week to appropriately equip interviewers

SWEL sample review uncovered around 23 respondents from the test group located outside the reach of local (Detroit) interviewers. We are working on the options for data collection by phone + mailing wearable biometric devices. This is a new development that will be discussed in more detail in the upcoming month.

| | |
|---|---|
| **Special Issues** | We are still facing issues with Blaise 5.2 in the mobile setting. Blaise 5.2 did not accept "0" as a valid answer in numeric format questions (registered as an official Blaise bug). Bug fix options included switching from MVC to ASP. ASP produced different kinds of errors - multi-select questions canceled selections when multiple items were chosen. We had to roll-back from MVC to ASP and try a different fix for the original error (not accepting "0"). The survey was held up and not ready for release to the client for a two weeks as we were dealing with the issue.<br><br>In addition, Blaise 5.2 does not have any options to scale to different phones programming layout has to be specific to the device. We don't yet know 100% which phone model will be used for SWEL and could potentially have to spend more time fixing layout if different hardware is used. |

**Cost**
**Mar 13, 2017**

| | |
|---|---|
| *Total Cost to Date (Direct + Indirect):* | 30,899.63 |
| *Estimated Cost at Completion (E$AC):* | 544,623.78 |
| *Total Budget:* | 683,647.00 |
| *Variance (Budget minus E$AC):* | 139,024.22 |
| *Reason For Variance:* | Cost for the project needs to be re-projected given the delays in production start due to delays in the Pilot work carried out by the client. |

**Projections**
**Mar 13, 2017**

| | |
|---|---|
| *Dollars Projected For Month:* | 47,317.32 |
| *Actual Dollars Used:* | 15,912.19 |
| *Variance (Projected minus Actual):* | 31,405.13 |
| *Reason For Variance:* | Monthly costs need to be re-projected. |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| *Current Goal:* | | | |
| *Goal at Completion:* | 300 | 87% / 48% | 5.8 |
| *Current actual:* | 0 | | |
| *Estimate at Complete:* | | | 8.2 |
| *Variance:* | | | |

**Other Measures**

Test: 87%RR = 150 / 173 blacks
Control: 48% = 150 / 307 match 1 or 2

| | |
|---|---|
| **Project Name** | Surveys of Consumer Attitudes (SCA 2017) |
| **Project Mode** | Primary: Telephone    Total of Modes: 1 |
| **Project Type** | Sponsored Projects      **Project Status**  Current |
| **Budget** | ***Direct Budget:***  859,872.00    ***InDirect Budget:***  0.00    ***Total Budget:***  859,872.00 |
| **Principal Investigator/Client** | Dr. Richard T. Curtin (SRC) |
| **Funding Agency** | Bloomberg, others for Riders. |

**IRB**      ***HUM#:***      exempt      ***Period Of Approval:***

**Project Team**      ***Project Lead:***      Joseph Matthew Matuzak
     ***Budget Analyst:***      Dean E Stevens
     ***Production Manager:***
     ***Senior Project Advisor:***      Mary P Maher
     ***Production Manager:***
     ***Production Manager:***

**Proposal #:**      no data

**Description:** The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations.

The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 600 interviews.

**SRO Project Period**      12/2016 - 12/2017
**Data Col Period**      12/2016 - 12/2017
**Security Plan**      NA
**Milestone Dates**

| ***PreProduction Start:*** | ***Pretest Start:*** |
|---|---|
| ***Pretest End:*** | ***Recruitment Start:*** |
| ***Staffing Completed:*** | ***GIT Start:*** |
| ***SS Train Start:*** | ***SS Train End:*** |
| ***DC Start:*** | ***DC End:*** |

**Other Project Team Members:**
Dave Dybicki
Ann Munster
Kelley Popielarz
Pamela Swanson
Jennie Williams
LaVelvet Harrison
Paul Burton
Nancy Walker
Tim Wright

**Other Project Names:**

| | |
|---|---|
| **Sample Mgmt Sys** | SMS |
| **Data Col Tool** | Blaise 4.8 |
| **Hardware** | Desktop |
| **DE Software** | Blaise 4.8 BIA |
| **QC Recording Tool** | DRI-CXM |
| **Incentive** | Not used |
|    **Administration** | SRO Group |
|    **Payment Type** | NA |
|    **Payment Method** | NA |

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**Report Period**      Mar, 2017 (SCA 2017)      **Project Phase**      Implementing

| | |
|---|---|
| *Risk Level* | *Some Concerns* |

**Monthly Update**   SCA completed its March study on time, finishing with 603 completed interviews with the desired split: 402 RDDs and 201 Recons. This was done with an instrument of 29.7 minutes in length, using 2052.8 interviewer hours and an unusually high 3.40 HPI. This month had an extra week in the production cycle, which was needed. SCA delivered a solid prelim total of 409 completes. This was a very busy month with training, as SCA conducted two cycles of new interviewer hiring and trainings, adding a total of nine new interviewers for the April study month (out of thirteen trained), with two still in the certification process. We had targeted twelve new interviewers but happily did not lose and additional on-staffers. In addition, we worked extensively in March with the Survey Methodology Program's students, introducing them to SCA and the SSL, and training them on GIT, SCA study specific, SMS and QC.

**Special Issues**   SCA has a large number of very inexperienced people, and needs to focus on ongoing training activities to improve their skill levels. Interviewer review is also a challenge, as the QC staff is stretched thin with other projects.

**Cost**
**Mar 09, 2017**

| | |
|---|---|
| *Total Cost to Date (Direct + Indirect):* | 133,706.42 |
| *Estimated Cost at Completion (E$AC):* | 895,398.63 |
| *Total Budget:* | 859,872.00 |
| *Variance (Budget minus E$AC):* | -35,526.63 |
| *Reason For Variance:* | Some hiring and training costs still need to be backed out, to reflect the change in how hiring charges are now to be allocated for SSL projects. |

**Projections**
**Mar 09, 2017**

| | |
|---|---|
| *Dollars Projected For Month:* | 67,926.00 |
| *Actual Dollars Used:* | 1,279.63 |
| *Variance (Projected minus Actual):* | 0.00 |
| *Reason For Variance:* | Higher than anticipated HPI and additional interviewer hours. |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| *Current Goal:* | | | |
| *Goal at Completion:* | 600 | 9 | 2.80 |
| *Current actual:* | | | |
| *Estimate at Complete:* | 603 | 8 | 3.40 |
| *Variance:* | 3 | -1 | 0.6 |

**Other Measures**