

Survey Research Operations

Monthly Project Report

Sponsored Projects

April 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
(EARDS) Empirical Assessment of Respondent Driven Sampling
(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

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	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:	<p>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.</p> <p>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.</p> <p>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.)</p>												
SRO Project Period	05/2016 - 03/2018												
Data Col Period	05/2016 - 02/2018												
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start: 05/15/2016</td> <td style="padding: 5px;">Pretest Start:</td> </tr> <tr> <td style="padding: 5px;">Pretest End:</td> <td style="padding: 5px;">Recruitment Start: 05/20/2016</td> </tr> <tr> <td style="padding: 5px;">Staffing Completed: 05/20/2016</td> <td style="padding: 5px;">GIT Start:</td> </tr> <tr> <td style="padding: 5px;">SS Train Start:</td> <td style="padding: 5px;">SS Train End:</td> </tr> <tr> <td style="padding: 5px;">DC Start: 05/20/2016</td> <td style="padding: 5px;">DC End: 02/28/2018</td> </tr> </table>			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
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												
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												

Report Period	Apr, 2017 (ABCD)	Project Phase	Implementing
----------------------	------------------	----------------------	--------------

Risk Level	On Track
-------------------	----------

Monthly Update	We continue to do well, PI is happy with "flow" of clinic recruits that are following our school recruits. We expect things to slow way down for the summer.
-----------------------	--

Special Issues

None

Cost

Apr 10, 2017

Total Cost to Date (Direct + Indirect): 142,893.00
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

Apr 10, 2017

Dollars Projected For Month: 0.00
Actual Dollars Used: 17,220.00
Variance (Projected minus Actual): 0.00
Reason For Variance:

Measures

	Units Complete	RR	HPI
<i>Current Goal:</i>	54		
<i>Goal at Completion:</i>	70		
<i>Current actual:</i>	65		
<i>Estimate at Complete:</i>			
<i>Variance:</i>			

Other Measures

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	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:	<p>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 from 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.</p>												
SRO Project Period	02/2015 - 11/2019												
Data Col Period	10/2015 - 11/2019												
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%;"> <tr> <td>PreProduction Start: 02/01/2015</td> <td>Pretest Start: 10/14/2015</td> </tr> <tr> <td>Pretest End: 03/31/2016</td> <td>Recruitment Start:</td> </tr> <tr> <td>Staffing Completed:</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start:</td> <td>SS Train End:</td> </tr> <tr> <td>DC Start: 09/12/2016</td> <td>DC End: 09/30/2019</td> </tr> </table>			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
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												

Report Period	Apr, 2017 (A-STARRS LS)	Project Phase	Implementing
Risk Level	Some Concerns		
Monthly Update	<p>This report provides a summary of the April activities of the Michigan team for the STARRS LS project, as well as our monthly expenses for March 2017 and estimated cost to complete for Years 1-5 of the project. The cost estimates are not commitments to our final cost or scope, but are intended for planning purposes to give the Principal Investigators our current and best estimates of Michigan activities and costs through November 2019.</p>		

5 19 14.6% Y (Priority Mail) Y (3) Y (1) N Y (4) \$100 End Game

- Starting with Replicate 15, the sampling rates were adjusted to keep data collection costs within the available budget.
- Harvard provided the sample for Replicates 15-33. Table 2 below shows the counts for each replicate.

Table 2: Counts by Replicate: Cases released at Phase 1

Replicate #	Phase 1 Cases released	Cumulative cases
1-3	3,006	3,006
4-13	23130	26,136
14	2313	28,449
15	1164	29,613
16	1296	30,909
17	1216	32,125
18	1287	33,412
19	1160	34,572
20	1269	35,841
21	1237	37,078
22	1231	38,309
23	1175	39,484
24	1236	40,720
25	1149	41,869
26	1246	43,115
27	1150	44,265
28	1238	45,503
29	1196	46,699
30	1274	47,973
31	1249	49,222
32	1227	50,449
33	1284	51,733

- We delayed the release of Replicate 15 by one week to give us time to prepare for the sample selection. Replicates 16-33 will continue to be released every other week.
- Table 3 below provides the timeline for sample replicates 11-15.

Table 3: Timelines for Current Sample Replicates

	Repl. 11	Repl. 12	Repl. 13	Repl. 14	Repl. 15
Phase 1 (letter, coin)	2/20-2/26	3/6-3/12	3/20-3/26	4/3-4/9	4/24-4/30
Phase 2 (email, text)	2/27-3/14	3/13-3/28	3/27-4/11	4/10-4/25	5/1-5/16
Phase 3 (\$50/\$100, telephone calls)*		3/15-3/31	3/29-4/14	4/12-4/28	4/26-5/12 5/17-6/2
Phase 4 (\$100, phone calls)	4/1-4/11	4/15-4/25	4/29-5/9	5/13-5/23	6/3-6/13

* Replicates 10-12 include an experiment offering \$50 and \$100 at Phase 3. Starting with Replicate 13, all Phase 3 participants are offered \$50.

- We continued working on plans for implementing Phase 5 (end game) for Wave 1 data collection. This will begin in June and we will start with sample from Replicate 11.
- We trained an additional four interviewers in April to help address the shortfall in interviewer hours.

Data Collection Results:

- Table 4 below show response rates by phase as of April 27.

Table 4: Response Rate by Replicate and Phase as of 27 April 2017: Replicates 11-15.

	Rep 11	Rep 12	Rep 13	Rep 14	Rep 15
Replicate Launch Date		20-Feb	6-Mar	20-Mar	3-Apr 24-Apr
Sample Size	2,313	2,313	2,313	2,313	1,164
Total Interviews	557	563	383 #	361 #	0 #
Cumulative Weighted Resp Rate			32.4%	34.2%	18.8% 15.9% 0.0%
Completion Rates by Phase*					
Phase 1 (letter, coin)	2.8%	2.5%	1.7%	2.3%	0.0% #
Phase 2 (email, text msg)	12.8%	11.8%	13.1%	13.9%	N/A
Phase 3a (\$100, calls)	8.3%	12.0%	N/A	N/A	N/A
Phase 3b (\$50, calls)	6.0%	9.7%	6.1% #	1.1% #	N/A
Phase 4a (3a) (\$100, calls)		13.9%	14.7%	N/A	N/A
Phase 4b (3b) (\$100, calls)		14.7%	14.5%	N/A	N/A

*Phase completion rates are conditional (% completes in that phase)

Replicates 13-15 are still being worked; phase not complete.

Using our current cost and response rate projections, we estimate the following numbers of completed interviews:

- Wave 1 main interviews: 14,322
- Wave 1 end game interviews: 500
- Wave 2 main interviews: 9,049
- Wave 2 end game interviews: 500

We will continue to monitor cost and response rate assumptions, and will update the projections of completed interviews by wave on a quarterly basis.

Safety Plan Results:

- Table 5 below provides safety plan counts and rates as of 27 April.

Table 5: Safety Plan Counts and Rates as of 27 April

# Started Interview (N)	% of starts	# of Completed Interviews	Safety Plan Checks
Michigan Clinicians	2,816	2,648	457 16.2%
Army Chaplains	4,755	4,416	262 5.5%
End Game IVR, manually processed		6	4 1 16.7%
Total Sample	7,577	7,068	720 9.5%

Cost Report:

Our estimate of current costs, and a preliminary cost-to-complete projection by task and project year is shown in Table 6 below. We spent a total of \$353,328 in March 2017 on data collection, production support, project management, data management and reporting, and enclave support. We revised our cost projections based on the revised sample design for Wave 1 and updated design and cost assumptions for Wave 2 data collection. We are currently projecting a deficit of \$41,025 for the total project (0.3% of the total budget), reducing our total cost estimate by \$388,922 from last month's report. We will continue to evaluate the cost and production assumptions in our current cost projections and will update cost projections as needed. In addition, we continue to work on costs in all categories to bring and keep our total cost projections within the budgeted amount.

In addition to updating our cost projections for Wave 1 data collection with the current sample size and contact protocol design, we updated the Wave 2 cost assumptions based on Wave 1 expected results. We will attempt to contact 100% of the Wave 1 participants at Wave 2, and plan to use the same contact and incentive protocols. The current cost projections also include an end game (Phase 5) activity in both Wave 1 and 2.

Table 6: STARRS LS Cost Report for March 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 Feb '17		\$177,372	\$542,018	\$110,372	\$92,773 \$922,536
Actual costs for March 2017		\$40,305	\$235,219	\$37,249	\$40,555 \$353,328
Projected Costs Apr-Nov 2017		\$346,605	\$1,568,415	\$324,676	\$419,045 \$2,658,740
Total Year 3 Cost	\$564,282	\$2,345,652	\$472,297	\$552,373	\$3,934,604
Variance	(\$164,274)	(\$364,257)	\$3,952	\$51,035	(\$473,544)
Year 4 Budget	\$280,594	\$1,055,329	\$410,278	\$654,463	\$2,400,664
Year 4 Projected Total Cost		\$350,005	\$1,537,663	\$430,349	\$639,721 \$2,957,738
Variance	(\$69,411)	(\$482,334)	(\$20,071)	\$14,742	(\$557,074)
Year 5 Budget	\$263,619	\$805,264	\$418,806	\$636,637	\$2,124,326
Year 5 Projected Total Cost		\$333,301	\$1,116,980	\$439,553	\$602,385 \$2,492,219
Variance	(\$69,682)	(\$311,716)	(\$20,747)	\$34,252	(\$367,893)
Total Budget	\$2,088,910	\$5,874,656	\$2,015,689	\$2,758,978	\$12,738,233
Total Projected Cost at Completion		\$2,682,229	\$5,534,750	\$2,074,337	\$2,487,942 \$12,779,258
Total Variance	(\$593,319)	\$339,906	(\$58,648)	\$271,036	(\$41,025)

*Includes costs for the pilot, totaling \$134,000.

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 (61%), but our rate of making contact with respondents is lower than we would like. (54%)
 - o We continue to wait for the Army to determine if they can provide any additional address information for the STARRS-LS sample.
 - o We are adding individual lookups from Accurint to our end game protocol to see if that can help improve our contact rate.
- 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.
- Safety plan issues
 - o We have had three protocol deviations on the Army side, where individuals in the Soldier's chain of command were informed of STARRS participation and the need for a safety plan follow up. The ODUSA is working closely with the Chief of Chaplains office and has updated Chaplain information sheets and project documentation to try to avoid this type of problem in the future.
 - o We are also meeting with the Michigan IRB to explain the situation, and make sure we are doing everything possible to ensure participant confidentiality.

Cost

Apr 11, 2017

Total Cost to Date (Direct + Indirect): 4,670,560.00

Estimated Cost at Completion (E\$AC): 12,779,258.00

Total Budget: 12,738,233.00

Variance (Budget minus E\$AC): -41,025.00

Reason For Variance:

This month we adjusted the sample size and contact protocol to bring total data collection costs closer to the budgeted amount. This included adjusting the Wave 1 data collection assumptions and also refining the Wave 2 design and cost estimates. We were able to bring our cost overrun down from \$400,000 to \$40,000. We will continue to monitor our cost and production assumptions, and will make additional adjustments as necessary to reduce the projected deficit before the end of the five-year funding cycle.

Projections

Apr 11, 2017

Dollars Projected For Month: 381,140.00

Actual Dollars Used: 353,328.00

Variance (Projected minus Actual): 27,812.00

Reason For Variance:

This month's under-run is due to fewer hours being worked than projected, and also some of the nonsalary projections were a little off.

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.

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) 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:	<p>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.</p> <p>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.</p>					
SRO Project Period	04/2016 - 02/2017					
Data Col Period	07/2016 - 03/2017					
Security Plan	NA					
Milestone Dates	<table border="1" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> PreProduction Start: 04/01/2016 Pretest End: Staffing Completed: SS Train Start: 10/17/2016 DC Start: 10/03/2016 </td> <td style="width: 50%; vertical-align: top;"> Pretest Start: Recruitment Start: 07/01/2016 GIT Start: SS Train End: DC End: </td> </tr> </table>				PreProduction Start: 04/01/2016 Pretest End: Staffing Completed: SS Train Start: 10/17/2016 DC Start: 10/03/2016	Pretest Start: Recruitment Start: 07/01/2016 GIT Start: SS Train End: DC End:
PreProduction Start: 04/01/2016 Pretest End: Staffing Completed: SS Train Start: 10/17/2016 DC Start: 10/03/2016	Pretest Start: Recruitment Start: 07/01/2016 GIT Start: SS Train End: 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

Report Period

Apr, 2017 (DMACS)

Project Phase

Implementing

Risk Level*Some Concerns***Monthly Update**

During April 2017, SRO activities included the following:

Task 1: Management, Budget and Work Plan

- Finalized approach to Wave 1 missing data cases, implemented using FTF follow-ups on 46 cases.
- Revised timeline for Wave 2 proposed, agreed upon.
- Completed Wave 2 material revisions for IRB submission
 - o Additional revision created, submitted and approved to add Wave 2 deadlines, final reminder for web cases, and correction for changed addresses.

Task 2: Sampling

- Additional Wave 2 preload prepared.

Task 3: Questionnaire Development

Task 4: CAI Programming

- Additional page added for changed Wave 2 addresses to emphasize need for updated contact information.
- Preload adjusted to reflect added incentive payment to respondents blocked because of address changes.

Task 5: Systems Programming

- Wave 2 reports set up.
- Wave 2 SurveyTrak system set up, tested, launched.
- Wave 2 sample pushed to interviewers for reminder calling.
- Wave 1 missing respondent data pushed to field interviewers, using Case Notes to provide PII information.

Tasks 6, 7: Interviewer Recruitment & Hiring, Training

- Weekly Interviewer meetings conducted.
- Second training of interviewers conducted.
 - o Debrief with study staff about Wave 1 FTF experiences.
 - o Training on FTF collection of missing Wave 1 respondent names.
 - o Training on Wave 2 reminder calling.

Task 8: Main Data Collection

- Wave 1 web data collection completed, with a total of 714 completes as of 4/27/17.
- Respondent Incentive payments processed on a weekly basis.
- Tracking of missing respondent payment information, with interviewers going door to door to collect missing respondent data, and providing incentive payments FTF.
- Primary data entry of Wave 1 PAPIs completed, but late arrivals added on a rolling basis.
- Wave 2 launched, with 237 web interviews completed as of April 27th
 - o Email and letter invitations sent
 - o Reminders sent, both web and letter
 - o PAPI questionnaires sent out
 - o Interviewer reminder calling begun.

Task 9: Post Collection Processing

Task 10: Weighting

- Discussions pertaining to weighting continued
- Wave 1 weighting begun

Task 11: Final Data Deliverables

Cost information: Kresge Foundation funding

Total survey funding awarded:	\$	256,770
Total Expended as of 3/31/2017	\$	225,693
Expected cost at complete	\$	277,874
Expected Variance:	\$	(21,105)

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 higher (\$21,105), as we continue to run late on the project. We will have more clarity once the face-to-face effort on respondent tracking comes to an end and we fully know what the travel costs will be, as we feel there is still an overestimate there. 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 as we have gotten a far higher percentage of PAPI responses than expected, and these arrive in a more drawn out time frame than do web completes. 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 while we surpassed our Wave 1 goal, we did so with an imbalance in the expected response by mode, with a much higher PAPI response than was desired. The adjustment to the Wave 2 data collection process to try to stimulate more web response has thus far helped, as if we hit our Wave 2 goal we will end up with more than 50% of the responses being on the web, compared to an 43% rate in Wave 1. But this process has had an impact on effort and cost levels, as well as timeline. 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 is starting to lower in intensity. We now expect to end up extending data collection at least through June, but the effort needed will drop and will stay lower after the middle of May.

Cost
Apr 18, 2017

Total Cost to Date (Direct + Indirect):	225,692.50
Estimated Cost at Completion (E\$AC):	277,874.24
Total Budget:	256,769.00
Variance (Budget minus E\$AC):	-21,104.24

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
Apr 18, 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 since the project continues to operate on an extended timeline.

Measures

	Units Complete	RR	HPI
Current Goal:	712		1.0
Goal at Completion:	712		1.0
Current actual:	714		
Estimate at Complete:	714		
Variance:	2		

Other Measures

Wave 2 goal: 460 completes. Currently: 237 completes.

Project Name	Empirical Assessment of Respondent Driven Sampling (EARDS)						
Project Mode	Primary: Face to Face Total of Modes: 1						
Project Type	Sponsored Projects		Project Status	Current			
Budget	Direct Budget:	151,337.00	Indirect Budget:	83,234.00	Total Budget: 234,871.00		
Principal Investigator/Client	Sunghee Lee (ISR)						
Funding Agency							
IRB	HUM#:		Period Of Approval:				
Project Team	Project Lead:	Sara D Freeland					
	Budget Analyst:	Dean E Stevens					
	Production Manager:	Sara D Freeland					
	Senior Project Advisor:	Kirsten Haakan Alcser					
	Production Manager:	James Koopman					
	Production Manager:						
Proposal #:	no data						
Description:	This project has been funded to assess the feasibility of a Respondent Driven Sampling plan involving Korean Americans and Intravenous Drug Users (IDU). The effort focusing on Korean Americans is being done in Los Angeles and overseen by the PI and her staff. SRO's involvement centers on the IDU sample, which will take place in the Great Detroit area. The IDU sample portion of the project is expected to start in the fall of 2016, beginning with focus groups. This part of the project will also include staffing field interviewers to manage in person ACASI survey data collection at 3 different sites in the Greater Detroit area.						
SRO Project Period	10/2016 - 10/2017						
Data Col Period	05/2017 - 08/2017						
Security Plan	NA						
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="width: 50%; vertical-align: top;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>					PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:						
Other Project Team Members:							
Other Project Names:	PATH (Positive Assessment Towards Health)						
Sample Mgmt Sys	SurveyTrak						
Data Col Tool	Blaise 4.8						
Hardware	Laptop						
DE Software	Blaise 4.8 BIA						
QC Recording Tool	N/A						
Incentive	Yes, R						
Administration	SRO Group						
Payment Type	Cash, post (\$30/Main interview \$10/coupon interview(up to 3)\$5 if ineligible)						
Payment Method	NA						

Report Period	Apr, 2017 (EARDS)	Project Phase	Implementing
Risk Level	Not Rated		
Monthly Update	Training was delayed until the last week of the Month and production will start May 1st. We are still working on finalizing the production instruments and this effort will still be occurring while we are in the field.		
Special Issues	We are still implementing technical fixes for the project and are behind schedule. This should not affect our ability to collect accurate data.		

Cost
May 31, 2017

<i>Total Cost to Date (Direct + Indirect):</i>	43,749.69
<i>Estimated Cost at Completion (E\$AC):</i>	248,834.80
<i>Total Budget:</i>	234,871.00
<i>Variance (Budget minus E\$AC):</i>	-14,263.80
<i>Reason For Variance:</i>	

Projections
May 31, 2017

<i>Dollars Projected For Month:</i>	22,242.57
<i>Actual Dollars Used:</i>	12,001.38
<i>Variance (Projected minus Actual):</i>	10,241.19
<i>Reason For Variance:</i>	

Measures

	Units Complete	RR	HPI
<i>Current Goal:</i>	400		
<i>Goal at Completion:</i>	400		
<i>Current actual:</i>			
<i>Estimate at Complete:</i>			
<i>Variance:</i>			

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) Ken Langa (SRC-ISR) 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:	<p>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.</p> <p>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.</p>				
SRO Project Period	01/2015 - 12/2017				
Data Col Period	05/2016 - 02/2017				
Security Plan	NA				
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="text-align: center; vertical-align: top;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>			PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:				
Other Project Team Members:	Applications Programmers: Jeff Smith (STrak), Holly Ackerman (Webtrak, Weblog) CAI Programmer: Jim Hagerman Data Manager: Brad Goodwin 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				

Report Period	Apr, 2017 (HCAP 2016)	Project Phase	Implementing
Risk Level	Some Concerns		
Monthly Update	In April we completed 335 interviews (Respondent and Informant combined). Priority was given to release 7 cases which were all Proxy interviews in HRS. HRS interviews completed via Proxy are usually those where the sample member is physically or cognitively unable to do the interview. Occasionally there are sample members who do not		

want to be involved in the research but allow their spouse or another person in their life to complete the interview. So pursuing the HCAP interview with these participants has been challenging and slower to complete. We have the lowest response rate (~20%) among this subgroup.

It is not yet determined how much more sample will be released. Since HRS will continue the data collection through June 2017, we expect to get a release in May and possibly one after the end of HRS, in early July. The focus of the next releases will be again HRS Proxy cases.

Special Issues

Cost

Apr 17, 2017

Total Cost to Date (Direct + Indirect): 3,793,664.17
Estimated Cost at Completion (E\$AC): 4,703,264.97
Total Budget: 4,476,719.00
Variance (Budget minus E\$AC): -226,542.97

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

Apr 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	<table><tr><td>PreProduction Start:</td><td>04/01/2015</td><td>Pretest Start:</td><td>10/16/2015</td></tr><tr><td>Pretest End:</td><td>11/07/2015</td><td>Recruitment Start:</td><td>06/01/2015</td></tr><tr><td>Staffing Completed:</td><td>03/15/2016</td><td>GIT Start:</td><td>02/10/2016</td></tr><tr><td>SS Train Start:</td><td>02/12/2016</td><td>SS Train End:</td><td>04/24/2016</td></tr><tr><td>DC Start:</td><td>02/22/2016</td><td>DC End:</td><td>04/29/2017</td></tr></table>					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
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																								

Report Period	Apr, 2017 (HRS 2016)	Project Phase	Implementing
Risk Level	Some Concerns		
Monthly Update	During the month of April, data collection for the new cohort and panel components continued. Panel sample remained the focus with formal decision to finish panel data collection by end of June 2017. Goals have been revised to extend panel and new cohort data collection. Training of 47 new hires was conducted in early April with a second small training of 5 interviewers in late April. Recruitment efforts are underway for a June training of approximately 38 interviewers to support new cohort production.		

Technical Development: Minimal development in production systems continues (including SurveyTrak, WebTrak and WebLog).

Health and Retirement Study - 2017/18 technical development update – April 2017

Milestones

- Web pilot 'online' (MSMS + Blaise 5) - second week in July 2017, n=200
- CAPI mode pilot 'offline' - third/fourth week in 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
Mar 31, 2017

Total Cost to Date (Direct + Indirect): 29,027,985.91
Estimated Cost at Completion (E\$AC): 37,367,927.70
Total Budget: 33,579,127.00
Variance (Budget minus E\$AC): -3,788,800.70
Reason For Variance: Projections have been refined to add April New Cohort trainings and to extend data collection for panel into June and New Cohort into December 2017.

Projections
Mar 31, 2017

Dollars Projected For Month: 1,269,303.16
Actual Dollars Used: 1,382,502.24
Variance (Projected minus Actual): -113,199.60
Reason For Variance: Actual dollars for the month of March came in over projections due to interviewer hours coming in higher than projected. For non-salary, Rpay was under projections by 25k while Travel was over projections by 40k.

Measures

	Units Complete	RR	HPI
Current Goal:	23,569	85%	7.45
Goal at Completion:	23,569	85	7.45
Current actual:	18,885	69%	8.0
Estimate at Complete:	23,569	85	8.0
Variance:			

Other Measures

Goal for New Cohort is 5,228 interviews.
 Goal for Panel lws 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, child

Payment Method

Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office

Report Period

Apr, 2017 (HCDC, H&C)

Project Phase

Implementing

Risk Level*Some Concerns***Monthly Update**

During April 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.
- Met with representatives from Johns Hopkins and the University of Michigan to finalize language for draft data use agreement between JHU and UM.
- Responded to questions from the UM IRB. Updated documents as needed. Received Amendment approval.
- Prepared off-the cuff estimates for implementation of the Financial SAQ.
- Prepared off-the cuff estimates for database-based locating for the Voucher sample.
- Prepared materials for JHU IRB submission and transmitted to JHU.
- Negotiated with Northwestern University regarding preparation and delivery of dried blood spot (DBS) cards from Pilot University.
- Continued specification of production data deliverables, listing PII variables and datasets required. Met with data management team to discuss requirements.
- Finalized protocol on handling non-standard blocks during Neighborhood observations.
- Prepare materials for discussion of potential impact of incorporating Financial SAQ.
- Issued RFQ for packaging production materials for interviewers. Answered vendor questions. Analyzed vendor response and selected vendor.
- Held meetings to discuss production reporting needs.
- Updated project flow charts, showing interviewer work flow and activities during in-home visit.

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 presentation for sampling meeting with PIs, funders, and board
- Pilot eligibility analysis & eligibility estimation
- Frame analysis and mapping
- Frame data compilation
- Allocation calculations & discussion
- Documentation
- Preparation of Quarter 1 Population sample

Task 3: Questionnaire Development

% Task Spent to Date

- Shipped Pilot DBS cards to Northwestern University
- Negotiated with vendor regarding late delivery of DBS supplies from Northwestern, and impact on preparations for production.
- Interviewing Systems Maintenance and Development, Preparation for Main Production
- o PCG Interview
- ☐ Revised specifications to remove Financial SAQ
- ☐ Iterative testing
- o Neighborhood Observation
- ☐ Updated observation protocol
- Prepared specifications for data entry/scanning
- Developed new scenarios for testing programmed applications

- Updated testing protocol
- Reviewed/updated initial translations received from PI

Task 4: CAI Programming

% Task Spent to Date

- Iterative programming/testing of all H&C Blaise applications
 - o Screeners
 - o PCG
 - o Child
 - o Observational components (neighborhood, laser measurement, post-interview observations, contact observations)
- Specified and programmed Blaise application for reminder calling about Child Daily Diaries and SAQs

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 interviewer sample management system) for main study implementation. Updated specifications on contact observations, added specifications for locating. Iterative programming/testing of all applications.
- Finalized programming logging application; began testing logging application
- Programmed locating application – sent to testers.
- Began programming Webtrak (SRC's web-based management and reporting system)
- Created training and testing lines

Tasks 6, 7: Interviewer Recruitment & Hiring, Training

% Task Spent to Date

- Conducted additional recruitment trips. Hired one additional team leader. Final staffing as follows:
 - o Dallas – 21 interviewers hired
 - o Cleveland – 14 interviewers hired
 - o 4 travelers
 - o 5 Team Leaders
- Completed on-boarding and hiring paperwork for new-hire interviewers.
- Updated meeting room requirements for study-specific training. Conducted walk-through to finalize plans for laser tape measurement training.
- Finalized site selection for Train-the-Trainer and Team Leader training.
- Finalized daily plan for Train-the-trainer and Team Leader training
- Produced videos for pre-training in-home study and training
- Revised/elaborated day-by-day interviewer training agenda, revised training assignments
- Completed pre-training study materials for data collection staff; launched Moodle
- Finalized materials and Moodle programs for interviewer certification
- Began writing training manual chapters
- Updated/prepared presentation slides
- Held in-house training for Woodcock-Johnson certifiers; Laser tape measurement certifiers
- Began specification of items to be loaded on interviewer laptops
- Began specification of training sample lines needed.
- Began specification of training scripts needed
- Developed and printed flowchart banners for training

Task 8: Main Data Collection

% Task Spent to Date

- Prepared, formatted materials for main study
- Ordered/received supplies. Began shipping supplies to kitting vendor
- Reviewed & approved all vendor-prepared packaging for interviewer supplies
- Printed production materials

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, as well as negatively impact our screening costs.
- The frame for the population sample was determined in early March in order to have sufficient time to develop and select the population sample. Voucher sample zip codes provided in January was used to determine the Population sample frame. There is a risk of a mismatch between the Population sample and the Voucher sample, given the late arrival of the Voucher Sample.
- The adult interview is longer than originally budgeted by about 13 minutes. 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 was very low in the Pilot, despite reminder calling. SRC worked with the research team to develop a strategy to increase the return rate for this component. We incorporated changes from the research team which reduced the complexity of the diary. In addition, we are providing envelopes for each diary to encourage immediate return, which may help to improve return rates of individual diaries.
- 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 was 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.

**Cost
May 31, 2017**

Total Cost to Date (Direct + Indirect): 1,796,944.00

Estimated Cost at Completion (E\$AC): 10,690,829.00

Total Budget: 10,743,019.00

Variance (Budget minus E\$AC): 52,190.00

Reason For Variance: We expect this variance to disappear upon implementation of the full work scope. The projections do not yet include a Spanish language training.

**Projections
May 31, 2017**

Dollars Projected For Month: 229,174.00

Actual Dollars Used: 177,490.00

Variance (Projected minus Actual): 51,683.00

Reason For Variance: Large supplies costs and subcontractor costs were projected for the month. Supplies invoices have not yet hit the project. The subcontract for kitting was awarded late, and project preparations are running quite late due to late decisions on the part of the research team.

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 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) Jacqui Smith (ISR) David Weir (ISR)					
Funding Agency						
IRB	HUM#:	Period Of Approval:				
Project Team	Project Lead:	James Koopman				
	Budget Analyst:	Janelle P Cramer				
	Production Manager:	James Koopman				
	Senior Project Advisor:	Evanthia Leissou				
	Production Manager:					
	Production Manager:					
Proposal #:	no data					
Description:	<p>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.</p> <p>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.</p> <p>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.</p> <p>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:</p> <ul style="list-style-type: none"> • Four weeks after the original questionnaire mailing, a second questionnaire will be sent to persons who have not returned the original mail survey. • 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	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="width: 50%; text-align: center; vertical-align: top;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>				PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: 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

Report Period Apr, 2017 (HRS LHMS 2017) **Project Phase** Initiation

Risk Level On Track

Monthly Update We were delayed in the IRB and have had to push back our timeline. We received IRB approval May 1st, which was our original start date. We will mail out as soon as possible. Hoping to make a 5/15 initial mailing date.

Special Issues

Cost
Mar 20, 2017

Total Cost to Date (Direct + Indirect):	11,110.64
Estimated Cost at Completion (E\$AC):	499,329.53
Total Budget:	523,997.55
Variance (Budget minus E\$AC):	24,648.02
Reason For Variance:	

Projections
Mar 20, 2017

Dollars Projected For Month:	47,815.25
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	

Measures	Units Complete	RR	HPI
Current Goal:		70	
Goal at Completion:		70	
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)
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 End:

Staffing Completed:

SS Train Start:

DC Start: 03/02/2015

Pretest Start:

Recruitment Start: 01/26/2015

GIT Start:

SS Train End:

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

Report Period

Apr, 2017 (MTTS)

Project Phase

Closing

Risk Level*On Track***Monthly Update**

During April, 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

Task 10: Weighting

- Reviewed 2005-2007 data book
- Began development of contextual data surrounding the districts and schools included in the data collection
- Began work to develop sample weights for MKT

Task 11: Final Data Deliverables

Task 12: Video Storage Systems (EWB)

Cost information: Harvard subcontract funded by the National Science Foundation

Total survey funding awarded:	\$	1,019,417
Total Expended as of 3/31/2017	\$	959,418
Expected cost at complete	\$	989,314
Expected Variance:	\$	30,102

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.

Special Notes:**District Recruitment**

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

MQI Teacher Recruitment

- Teacher recruitment ended on April 18, 2016.

Special Issues

Harvard has verbally approved allowing Michigan to spend down the projected underrun to cover EWB's activities. We are updating projections to extend post-production work at SRO through the end of the summer, and will provide a new estimate to EWB.

Cost
Apr 15, 2017

Total Cost to Date (Direct + Indirect): 959,418.00
Estimated Cost at Completion (E\$AC): 989,314.00
Total Budget: 1,019,417.00
Variance (Budget minus E\$AC): 30,102.00
Reason For Variance: Work scope reductions, including lower than anticipated response rates have led to the underrun.

Projections
Apr 15, 2017

Dollars Projected For Month: 12,867.00
Actual Dollars Used: 5,428.00
Variance (Projected minus Actual): 7,439.00
Reason For Variance: Delays in the start of work on weights primarily led to the underrun.

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 End:

Staffing Completed:

SS Train Start:

DC Start:

Pretest Start:

Recruitment Start:

GIT Start:

SS Train End:

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

Report Period	Apr, 2017 (MTF-WPSP Year 2/MTF Illu	Project Phase	Implementing
----------------------	-------------------------------------	----------------------	--------------

Risk Level	<i>Not Rated</i>
-------------------	------------------

Monthly Update	<p>04/17</p> <p>Although IRB approval was received 4/3 production is delayed to 5/2 (launch web survey) due to pending IRB approval for an amendment which was approved on (4/21). Prod test on all systems have been completed, surveys have been signed off, preload has been received and prepared, URLs and QR code URLs have been delivered to client for inclusion in letters to be mailed to Rs.</p> <p>A new budget is being put in place to extend the current funding to the end of production.</p>
-----------------------	---

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 Arealink 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		
Mar 31, 2017	<i>Total Cost to Date (Direct + Indirect):</i>	407,635.27
	<i>Estimated Cost at Completion (E\$AC):</i>	429,874.30
	<i>Total Budget:</i>	435,158.00
	<i>Variance (Budget minus E\$AC):</i>	5,283.70
	<i>Reason For Variance:</i>	

Projections		
Mar 31, 2017	<i>Dollars Projected For Month:</i>	41,565.46
	<i>Actual Dollars Used:</i>	42,643.12
	<i>Variance (Projected minus Actual):</i>	-1,077.66
	<i>Reason For Variance:</i>	

Measures

	Units Complete	RR	HPI
<i>Current Goal:</i>			
<i>Goal at Completion:</i>			
<i>Current actual:</i>			
<i>Estimate at Complete:</i>			
<i>Variance:</i>			

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	<table border="1" style="width: 100%;"> <tr> <td>PreProduction Start: 02/16/2017</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start:</td> </tr> <tr> <td>Staffing Completed:</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start: 03/30/2017</td> <td>SS Train End: 04/06/2017</td> </tr> <tr> <td>DC Start: 04/04/2017</td> <td>DC End: 05/23/2017</td> </tr> </table>			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
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 2017 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												

Report Period	Apr, 2017 (MTF Tablet Pilot)	Project Phase	Implementing
----------------------	------------------------------	----------------------	--------------

Risk Level	On Track
-------------------	----------

Monthly Update	In April: Fall 2016 data deliverables were delivered on 4/26.
-----------------------	--

We held our third and final training call on April 6th. We trained 12 lead FRs and 28 helpers.

Production launched with our first administration in VA on 4/4. Daric worked closely with David on tablet and materials kitting, shipping schedule, and communication with the field staff. We now have dates for all 15 schools.

The team hit the road for observations:

4/18 GA Kyle
 4/18 and 4/19 TN Meredith
 4/21 PA Daric
 4/27 NY Paul
 4/27 NC Barb

Upcoming:
 5/23 WA Kyle
 5/23 MI Meredith

As of 4/27, we have collected surveys from 2,279 students, response rate 84%

Preliminary reflections:

-Launch Survey app has further improved survey workflow for students. Still needs some refinement around when and where Encryption is handled (encryption of partial surveys and resetting the app). Process - more foolproof for field staff and students.
 -Field notes that the students, even in mass admins, are much quieter and more engaged. "Best mass session I've ever experienced."
 -New kitting much improved, field likes more robust tablet totes and Gator bags. Tablet totes at 16 lbs still "heavy" but I don't think we will be able to do much more in this department. Weight/bulk trade-off seems to be understood.
 -Newest cart - ok, but items could fall off sideways. Looking at VersaCart
<https://www.bedbathandbeyond.com/store/product/versacart-folding-utility-cart-in-navy/1012011610>

Special Issues

Cost
 Apr 30, 2017

Total Cost to Date (Direct + Indirect):	694,747.73
Estimated Cost at Completion (E\$AC):	817,791.35
Total Budget:	715,823.00
Variance (Budget minus E\$AC):	-101,968.35
Reason For Variance:	

Projections include all work to finish the 2017 piloting except the cost of the tablets. The cost of the tablets did not come through until the first week of May, so that cost (\$160,485) is NOT reflected here - neither in projections nor actuals.

Current 5-year grant ends 4/30/2017 and a new grant effective 5/1/2017 will be established. For the remainder of the Tablet project for 2017, Nick P. will fund us based on the estimated cost we provide to him. Once we agree on that, Chrissy will add the budget to the CRS under the current 2017 grant to resolve the overrun and then will add the remaining funds that are needed to complete the project to the new PG that is effective 5/1/2017.

The numbers above combine the amounts from the old and new PGs

PG ending 4/30/17:
 Budget: \$715,823.00
 Total cost to date: \$694,747.73
 Cost at completion: \$694,747.73
 Projections: \$0
 Variance: \$21,075.27

PG starting 5/1/17:
 Budget: \$0
 Total cost to date: \$0
 Cost at completion: \$123,043.62
 Projections: \$123,043.62
 Variance: \$-123,043.62

Projections
 Apr 30, 2017

Dollars Projected For Month:	325,931.03
Actual Dollars Used:	78,113.71
Variance (Projected minus Actual):	247,817.32
Reason For Variance:	

The cost of the tablets did not come through until the first week of May, so that cost (\$160,485) is not reflected here yet

Measures			
	Units Complete	RR	HPI
	<i>Current Goal:</i> <i>Goal at Completion:</i> <i>Current actual:</i> <i>Estimate at Complete:</i> <i>Variance:</i>		

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) 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	<table><tr><td>PreProduction Start:</td><td>03/01/2011</td><td>Pretest Start:</td><td></td></tr><tr><td>Pretest End:</td><td></td><td>Recruitment Start:</td><td>06/01/2011</td></tr><tr><td>Staffing Completed:</td><td>08/17/2011</td><td>GIT Start:</td><td>09/13/2011</td></tr><tr><td>SS Train Start:</td><td>09/15/2011</td><td>SS Train End:</td><td>09/19/2011</td></tr><tr><td>DC Start:</td><td>09/20/2011</td><td>DC End:</td><td>07/01/2019</td></tr></table>					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
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																								
Report Period	Apr, 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

Apr 07, 2017

Total Cost to Date (Direct + Indirect): 29,057,966.35
Estimated Cost at Completion (E\$AC): 43,102,880.80
Total Budget: 41,101,388.47
Variance (Budget minus E\$AC): 2,001,492.00
Reason For Variance: Additional workscope, higher than anticipated HPI, higher yield, higher interviewer attrition.

Projections

Apr 07, 2017

Dollars Projected For Month: 578,854.32
Actual Dollars Used: 592,187.48
Variance (Projected minus Actual): 13,333.16
Reason For Variance: More interviewer travel hours and expenses than anticipated.

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:	<p>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.</p> <p>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).</p>												
SRO Project Period	04/2014 - 03/2018												
Data Col Period	03/2015 - 01/2016												
Security Plan	Yes												
Milestone Dates	<table border="1" style="width: 100%;"> <tr> <td>PreProduction Start:</td> <td>Pretest Start: 12/21/2016</td> </tr> <tr> <td>Pretest End: 01/03/2017</td> <td>Recruitment Start:</td> </tr> <tr> <td>Staffing Completed:</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start:</td> <td>SS Train End:</td> </tr> <tr> <td>DC Start: 09/01/2016</td> <td>DC End: 05/31/2018</td> </tr> </table>			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
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:	<p>Wave 2 Team: Kyle Kwaiser (tech lead, data manager), Kathy LaDronka, Becky Loomis, Dolorence Okullo (data management), Hueichun Peng, Shaowei Sun</p> <p>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)</p>												

Other Project Names:	Adolescent Neurodevelopmental Health (ANDH) (Internal) 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 OI

Report Period	Apr, 2017 (AHRB)	Project Phase	Implementing
----------------------	------------------	----------------------	--------------

Risk Level	On Track
-------------------	----------

Monthly Update	<p>April was a month mostly in maintenance mode for the SRO AHRB Project team. We made address updates for Release 2 and continued with updating R1 details as they arrived. Response rate has risen to 43.2% (from 36% last month). The PI's Research Assistant's (RA's) have been phoning non-responders and partial-responders and I believe this is directly attributable to the increase in response rate. The RA's have also begun using social media (Facebook) in earnest to send messages to AHRB non-responders.</p> <p>We are preparing for the R2 email invitation--scheduled to be sent out on May 1, followed by 3 weekly reminders before non (and partial) responders are phoned by the RA's.</p>
-----------------------	---

Special Issues

Cost	Total Cost to Date (Direct + Indirect):	1,121,234.04
Mar 31, 2017	Estimated Cost at Completion (E\$AC):	1,493,471.77
	Total Budget:	1,427,000.00
	Variance (Budget minus E\$AC):	-66,471.77
	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	Dollars Projected For Month:	0.00
Mar 31, 2017	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

Report Period Apr, 2017 (YRS) **Project Phase** Implementing

Risk Level On Track

Monthly Update Study 1 interviewing concluded in early April 2017. We are now on a "pause" status until Study 2 starts up this fall. We will work on Study 2 development later this summer.

Special Issues**Cost****Apr 30, 2017**

<i>Total Cost to Date (Direct + Indirect):</i>	968,065.42	
<i>Estimated Cost at Completion (E\$AC):</i>	1,946,917.41	
<i>Total Budget:</i>	1,979,245.00	
<i>Variance (Budget minus E\$AC):</i>	32,327.59	
<i>Reason For Variance:</i>	Not all details for Study 2 are finalized so leaving some funds unallocated if needed for programming, training, etc.	

Projections**Apr 30, 2017**

<i>Dollars Projected For Month:</i>	39,397.35
<i>Actual Dollars Used:</i>	20,899.57
<i>Variance (Projected minus Actual):</i>	18,497.78
<i>Reason For Variance:</i>	

Measures

	Units Complete	RR	HPI
<i>Current Goal:</i>	3331	85%	3.0
<i>Goal at Completion:</i>	4200	85%	3.0
<i>Current actual:</i>	3847	69%	1.3
<i>Estimate at Complete:</i>		70%	
<i>Variance:</i>			

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:	<p>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</p>				
SRO Project Period	10/2015 - 09/2016				
Data Col Period	NA				
Security Plan	NA				
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="width: 50%; vertical-align: top;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>			PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: 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	Apr, 2017 (PSID-WB)	Project Phase	Closing
----------------------	---------------------	----------------------	---------

Risk Level *Not Rated*

Monthly Update No work was done this month. Closing work to archive the SMS was pushed back to May The upcoming month will include archiving SRO system for Wellbeing

Special Issues

Cost
Mar 31, 2017

<i>Total Cost to Date (Direct + Indirect):</i>	651,428.93
<i>Estimated Cost at Completion (E\$AC):</i>	662,641.86
<i>Total Budget:</i>	706,428.00
<i>Variance (Budget minus E\$AC):</i>	15,886.14
<i>Reason For Variance:</i>	

Projections
Mar 31, 2017

<i>Dollars Projected For Month:</i>	0.00
<i>Actual Dollars Used:</i>	0.00
<i>Variance (Projected minus Actual):</i>	0.00
<i>Reason For Variance:</i>	

Measures

	Units Complete	RR	HPI
<i>Current Goal:</i> <i>Goal at Completion:</i> <i>Current actual:</i> <i>Estimate at Complete:</i> <i>Variance:</i>			

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:	<p>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.</p> <p>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.</p>													
SRO Project Period	01/2016 - 04/2017													
Data Col Period														
Security Plan	NA													
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start: 01/01/2016</td> <td style="padding: 5px;">Pretest Start:</td> </tr> <tr> <td style="padding: 5px;">Pretest End:</td> <td style="padding: 5px;">Recruitment Start: 06/15/2016</td> </tr> <tr> <td style="padding: 5px;">Staffing Completed: 07/25/2016</td> <td style="padding: 5px;">GIT Start: 08/27/2016</td> </tr> <tr> <td style="padding: 5px;">SS Train Start: 10/17/2016</td> <td style="padding: 5px;">SS Train End: 10/20/2016</td> </tr> <tr> <td style="padding: 5px;">DC Start: 10/22/2016</td> <td style="padding: 5px;">DC End:</td> </tr> </table>				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:
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 Apr, 2017 (SN&WB) **Project Phase** Implementing

Risk Level *Some Concerns*

Monthly Update We are continuing data collection through April. We trained a new group of field screeners to help with this last push (since SSL no longer had availability). We also designed a re-take project to use to ask respondents to provide additional data using the devices (in cases where there was inadequate mEMA data for analysis)

Special Issues

Cost
Apr 30, 2017

Total Cost to Date (Direct + Indirect):	823,073.53
Estimated Cost at Completion (E\$AC):	911,497.00
Total Budget:	852,118.00
Variance (Budget minus E\$AC):	-59,379.00
Reason For Variance:	PI has additional funds for us to continue interviewing through April and conduct re-take interviews

Projections
Apr 30, 2017

Dollars Projected For Month:	88,735.32
Actual Dollars Used:	83,752.84
Variance (Projected minus Actual):	4,982.48
Reason For Variance:	We are experiencing some staff attrition as we extend through April (some staff had made other plans since they thought project would end in March.

Measures			
	Units Complete	RR	HPI
Current Goal:	350		10.0
Goal at Completion:	325		8.8
Current actual:	330	.43	10.3
Estimate at Complete:	335		
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) Toni Antonucci (UM ISR Life Course Development)												
Funding Agency													
IRB	HUM#: TBD	Period Of Approval:	TBD										
Project Team	Project Lead: Piotr Dworak Budget Analyst: Janelle P Cramer Production Manager: Derek Dubuque Senior Project Advisor: Kirsten Haakan Alcser Production Manager: Production Manager:												
Proposal #:	no data												
Description:	<p>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.</p> <p>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).</p> <p>Sample: Participants in Wave 3 of Social Relations (2014) from the Detroit tri-county area.</p> <p>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.</p>												
SRO Project Period	12/2016 - 10/2017												
Data Col Period	06/2017 - 09/2016												
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%;"> <tr> <td>PreProduction Start: 03/01/2017</td> <td>Pretest Start: 09/24/2017</td> </tr> <tr> <td>Pretest End: 09/28/2017</td> <td>Recruitment Start: 07/14/2017</td> </tr> <tr> <td>Staffing Completed: 09/22/2017</td> <td>GIT Start: 07/10/2017</td> </tr> <tr> <td>SS Train Start: 10/02/2017</td> <td>SS Train End: 10/05/2017</td> </tr> <tr> <td>DC Start: 10/08/2018</td> <td>DC End: 02/04/2018</td> </tr> </table>			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
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)												
Report Period	Apr, 2017 (SWEL)	Project Phase	Implementing										
Risk Level	On Track												
Monthly Update	SWEL client Pilot is expected to launch first of June. The client will invite 40 participants to the UM ISR lab. Lab visit is followed by a 4-day self-administered measurements using the wearable biometric equipment + momentary ecological												

assessment (EMA).

Contract agreements to lease Preventice BodyGuardian -- the core wearable device -- have been reached. We will receive kits with a better phone than expected - a Samsung J3 vs. an older S3 model. This will allow to run all wearable data collection and the EMA surveys on the same phone reducing the need for multiple devices.

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

The full integration testing is in progress as of late April/early May. In May, we are scheduled to receive BodyGuardian devices to finish the pilot implementation.

Implementing EMA for the Pilot will complete a substantial part of implementation for this project. Left to do will be:

- production changes to EMA including preload of social networks
- CAPI implementation and
- offline interviewer MSMS
- reporting and data warehouse

Tentative start of main data collection is now October but will be revisited in mid-July.

Special Issues

Client has ordered another BP measuring device for testing called Caretaker. Caretaker seems to work fine with its native app after downloading and choosing settings - front end implementation is fairly straightforward. However, the Caretaker app will require additional implementation associated with data transfer off the device and into the data warehouse.

As mentioned in the last monthly update, SWEL will need to conduct some interviews by Phone. A plan on how to execute this has been discussed with DCO and sent to the client for further considerations.

Cost Mar 31, 2017

Total Cost to Date (Direct + Indirect):	55,752.67
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 31, 2017

Dollars Projected For Month:	88,296.67
Actual Dollars Used:	24,853.04
Variance (Projected minus Actual):	63,443.63
Reason For Variance:	Monthly costs need to be re-projected when new timeline available.

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:	<p>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.</p> <p>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.</p>				
SRO Project Period	12/2016 - 12/2017				
Data Col Period	12/2016 - 12/2017				
Security Plan	NA				
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="padding: 5px;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>			PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: 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				

Report Period	Apr, 2017 (SCA 2017)	Project Phase	Implementing
----------------------	----------------------	----------------------	--------------

Risk Level*Some Concerns***Monthly Update**

SCA completed its April study one day early, finishing with 602 completed interviews with the desired split: 401 RDDs and 201 Recons. This was done with an instrument of 37.5 minutes in length, the longest since September 2010, which was before we were including cell phone sample. We ended up using 2179.9 interviewer hours and an disappointingly high 3.62 HPI. SCA delivered a decent prelim total of 393 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 completed working this month with the Survey Methodology Program's students, and focused heavily on assessing our large number of newer interviewers and trying to improve their contact skills.

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 also remains a challenge, as the QC staff is stretched thin with other projects.

Cost**Apr 30, 2017**

Total Cost to Date (Direct + Indirect):	259,021.21
Estimated Cost at Completion (E\$AC):	942,293.24
Total Budget:	859,872.00
Variance (Budget minus E\$AC):	-82,421.24
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. Interviewer hours are overall running much higher than expected.

Projections**Apr 30, 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	3.40
Current actual:			
Estimate at Complete:	602	8	3.62
Variance:	2	-1	0.22

Other Measures