Survey Research Operations

Monthly Project Report

Sponsored Projects

June 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
(CAMS 2017) HRS 2017 Consumption and Activity Mail Study
(HRS LHMS 2017) Life History Mail Survey
(MTTS) Mathematics Teachers & Teaching Study
(MTF Illume Web 2017) 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 TAS 2017) Panel Study of Income Dynamics - Transition to Adulthood Study 2017
(PSID-Imm) PSID Immigrant Refresher Screening Project
(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: ABCD is a longitudinal study of about 10,000 children from ages 9-10 through early adulthood to assess factors that influence individual brain development trajectories and functional outcomes. UM Dept of Psychiatry is one of 19 research sites across the country.

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

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

SRO Project Period   05/2016 - 03/2018
Data Col Period   05/2016 - 02/2018
Security Plan   NA
Milestone Dates

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

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	June, 2017 (ABCD)
	Project Phase Implementing
Risk Level	*On Track*
Monthly Update	UM Clinic is likely to have recruitment goal increased, so we will need to recruit additional schools We are projecting this will not overrun the budget.

Special Issues

Cost
Jun 20, 2017

Total Cost to Date (Direct + Indirect):	157,021.00
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
Jun 20, 2017

Dollars Projected For Month:	8,877.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	

Measures

	Units Complete	RR	HPI
Current Goal:	54		
Goal at Completion:	TBD		
Current actual:	68		
Estimate at Complete:	70		
Variance:			

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

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

Milestone Dates

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	June, 2017 (A-STARRS LS) **Project Phase** Implementing
Risk Level	*Some Concerns*
Monthly Update	This report provides a summary of the June activities of the Michigan team for the STARRS LS project, as well as our monthly expenses for May 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.

BLUF:
☐ Production data collection continues. We released sample replicates 18 and 19 this month, bringing the total number of released sample lines to 34,572.
☐ A total of 8,642 main Wave 1 interviews have been completed as of June 29. Production updates are being provided weekly to the research team via email, and a summary of data collection results is included in this report.
☐ We began the new Phase 5 (end game) data collection on June 21. As of June 29, we have completed 39 Phase 5 interviews.
☐ We submitted an evaluation of the recorded messages to the PIs, with a recommendation to discontinue this contact attempt. It was approved by the PIs and the Army.
☐ We received IRB approval for several annual renewals and ORIO #6 (safety plan protocol deviation); and submitted modification #11 (final contact protocol and end game updates)
☐ Enclave user support continues. We are working on setting up the replacement server.

Activities for June 2017 include:
Project Management and Planning:
• We continued production data collection through the month. We are sending weekly production updates to the PIs, and report on production progress on the call with the Army/ODUSA.
• We continued to meet weekly to coordinate safety plan and address lookup activities with the ODUSA.
• We received IRB approval for our sixth IRB protocol deviation and the annual continuing reviews for NSS, AAS, PPDS and HADS. The annual reviews for SHOS-A and the umbrella protocols are still being processed.
• We submitted IRB modification #11 outlining the decisions on subsampling rates and final contact protocols to be used for the remainder of Wave 1 data collection, as well as the final end game plans.
• We began discussing possible upgrades to the technical systems for Wave 2 data collection.
• We submitted a ballpark cost estimate for refreshing the STARRS sample using an NSS-type survey in Basic Combat Training sites.
• We reviewed and provided comments on the upcoming STAND-TO! article.
• We are working on several staffing adjustments to even out the workload among team members, and ensure that we have adequate backup when staff are out of the office.

Enclave and User Support:
• Members of the Enclave IT team continued to maintain security requirements for the Enclave hardware.
• We continued work on setting up the replacement server.
• Background check and Flux user access requests have been processed throughout the month.
• The enclave team continues to answer user questions and process data transfer requests as needed; and continues to receive, track and process requests for new software and license renewals as needed.
• We continue to support the analysis teams using the Army STARRS data.
• The PPDS longitudinal weights were loaded into the Enclave.
• The team completed several requests for ID swaps for the biomarker team.

Data Collection Progress and Plans:
• As of June 29, the production statistics are as follows:
o Replicates released: 1-19, with a total of 34,572 sample lines
o Completed Web main interviews: 7,310
o Completed CATI main interviews: 1,332
o Completed End Game interviews: 23 (19 Web, 4 IVR) from Replicates 1-2
o Completed End Game interviews: 16 (14 Web, 2 CATI) from Replicates 11-12
• Replicates 15-16 were completed this month. These were the first of the smaller replicates, with 53% subsampling at Phase 1. We discovered an error in the Phase 3 sampling rate for Replicates 15 and 16. The subsampling rate of 70% at Phase 3 was supposed to start with Replicate 15, but the sampling rates for replicates 15 and 16 remained at 50%. The correct rates are in place starting with Replicate 17. This will have a minor impact on the total number of completes. We will monitor progress and can work with Harvard to adjust sampling rates in later replicates if necessary.
• We submitted an evaluation of the recorded message protocol and results. The decision was made by the PIs and approved by the Army to stop this contact attempt. We will be stopping recorded messages starting with Replicate 19 (replicates 17 and 18 had already been started), and the contract with the vendor is being cancelled.
• We began the new Phase 5 (end game) data collection on June 21, two weeks later than originally scheduled due to staffing shortage and some issues with our technical systems.
• We released Replicate 11 and 12 together on June 21 in error. Letters were not sent for Replicate 12 until several days after the initial email was sent.
• We are working to put in place additional quality control checks and bring on additional staff to back up individuals that have been overloaded.
• We received two requests to withdraw from the study this month, and have updated our process documentation to manage these requests. (There are a total of three so far)
• Table 1 below provides the timeline for sample replicates 11-20, including main data collection (Phases 1-4) and end game (Phase 5) activities.

Table 1: Sample Size and Timelines for Current Sample Replicates

Main Data Collection (Phases 1-4)

Replicate #	Repl. 16	Repl. 17	Repl. 18	Repl. 19	Repl. 20
Ph. 1 Sample size	1,296	1,216	1,287	1,160	1,269
Ph. 1 (letter, coin)	5/8-5/14	5/22-5/28	6/5-6/11	6/19-6/25	7/3-7/9
Ph. 2 (email, text)	5/15-5/30	5/29-6/13	6/12-6/27	6/26-7/11	7/10-7/25
Ph. 3 ($50, phone)	5/31-6/16	6/14-6/30	6/28-7/14	7/12-7/28	7/26-8/11
Ph. 4 ($100, phone)	6/17-6/27	7/1-7/11	7/15-7/25	7/29-8/8	8/12-8/22
Ph. 5 Sample size	TBD	TBD	TBD	TBD	TBD
Ph. 5 ($100, short iw)	7/26-8/13	8/2-8/20	8/16-9/3	8/30-9/17	9/13-10/1

End Game Data Collection (Phase 5)

Replicate #	Repl. 11	Repl. 12	Repl. 13	Repl. 14	Repl. 15
Ph. 5 Sample size	116	111	114	110	53
Ph. 5 ($100, short iw)	6/21-7/9	6/21-7/16	7/5-7/23	7/12-7/30	7/19-8/6

Data Collection Results:
- Tables 2-3 below show response rates by phase as of June 29.

Table 2: Response Rate by Replicate and Phase as of 29 June 2017: Replicates 11-16 (Completed).

	Rep 11	Rep 12	Rep 13	Rep 14	Rep 15	Rep 16
Replicate Launch Date	20-Feb	6-Mar	20-Mar	3-Apr	24-Apr	8-May
Sample Size	2,313	2,313	2,313	2,313	1,164	1,296
Total Interviews	557	563	516	565	295	337
Cumulative Weighted Resp Rate Ph1-4	32.4%	34.2%	30.3%	33.2%	35.3%	36.1%
Completion Rates by Phase*						
Phase 1 (letter, coin)	2.8%	2.5%	1.7%	2.3%	2.1%	2.1%
Phase 2 (email, text msg)	12.8%	11.8%	13.1%	13.9%	14.3%	14.2%
Phase 3a ($100, calls)	8.3%	12.0%	N/A	N/A	N/A	N/A
Phase 3b ($50, calls)	6.0%	9.7%	6.9%	9.9%	12.4%	15.4%
Phase 4a (3a) ($100, calls)	13.9%	14.7%	N/A	N/A	N/A	N/A
Phase 4b (3b) ($100, calls)	14.7%	14.5%	12.1%	12.1%	11.9%	10.3%
Phase 5 ($100, Short interview)	14	2	N/A	N/A	N/A	N/A
Cumulative Weighted Resp Rate Ph 1-5	N/A	N/A	N/A	N/A	N/A	N/A

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

Table 3: Response Rate by Replicate and Phase as of 29 June 2017: Replicates 17-19 (in process)

	Rep 17	Rep 18	Rep 19
Replicate Launch Date	22-May	5-June	19-June
Sample Size	1,216	1,287	1,160
Total Interviews	330 #	216 #	97 #
Cumulative Weighted Resp Rate Ph1-4	30.8% #	17.2% #	8.4% #
Completion Rates by Phase*			
Phase 1 (letter, coin)	3.2%	2.3%	2.1%
Phase 2 (email, text msg)	16.4%	14.1%	6.6% #
Phase 3 ($50, calls)	14.3% #	1.7% #	N/A
Phase 4 ($100, calls)	N/A	N/A	N/A
Phase 5 ($100, Short interview)	N/A	N/A	N/A
Cumulative Weighted Resp Rate Ph 1-5	N/A	N/A	N/A

*Phase completion rates are conditional (% completes in that phase)
#Phase not complete

Projections:
- Table 4 below provides our projections of total main and end game interviews for Waves 1 and 2, using our cost and response rate projections as of April 2017. We continue to monitor cost and response rate assumptions, and will update this table quarterly.

Table 4: Projected data Collection Counts: Main and End Game

Interview Type	April 2017 Projections
Wave 1 Main interviews	14,332
Wave 1 End game interviews	500
Wave 2 Main interviews	9,049
Wave 2 End game interviews	500

Safety Plan Results:

- Table 5 below provides safety plan counts and rates as of 29 June.

Table 5: Safety Plan Counts and Rates as of 29 June

	# Started Interview (N)	# of Completed Interviews	Safety Plan Checks	% of starts
Main: Michigan Clinicians	3,491	3,276	559	17.2%
Main: Army Chaplains	5,792	5,385	334	5.8%
End Game IVR, manually processed	7	4	1	14.3%
End Game: Michigan Clinicians	8	8	3	37.5%
End Game: Army Chaplains	9	8	0	0.0%
Total Sample	9,307	8,681	936	10.1%

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 $263,032 in May 2017 on data collection, production support, project management, data management and reporting, and enclave support. We are currently projecting a surplus of $247,240 for the total project (1.9% of the total budget), decreasing our total cost estimate by $354,101 from last month's report.   We will continue to evaluate the cost and production assumptions and will update cost projections on a monthly basis. In addition, we continue to work on managing costs in all categories to keep our total expenses within the budgeted amount.

Table 6: STARRS LS Cost Report for May 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 April 2017	$257,754	$993,199	$184,788	$183,109	$1,618,851
	Actual Costs for May 2017	$39,015	$155,239	$33,482	$35,295	$263,032
	Projected Costs June-Nov 2017	$249,286	$1,086,653	$243,959	$286,323	$1,866,222
	Total Year 3 Costs	$546,055	$2,235,091	$462,230	$504,728	$3,748,104
	Variance	($146,047)	($253,696)	$14,019	$98,680	($287,044)
Year 4	Budget	$280,594	$1,055,329	$410,278	$654,463	$2,400,664
	Year 4 Projected Total Cost	$344,036	$1,510,270	$425,194	$613,517	$2,893,017
	Variance	($63,442)	($454,941)	($14,916)	$40,946	($492,353)
Year 5	Budget	$263,619	$805,264	$418,806	$636,637	$2,124,326
	Year 5 Projected Total Cost	$327,710	$1,111,157	$434,330	$581,978	$2,455,176
	Variance	($64,091)	($305,893)	($15,524)	$54,659	($330,850)
Total Budget		$2,088,910	$5,874,656	$2,015,689	$2,758,978	$12,738,233
Total Cost at Completion		$2,652,442	$5,390,972	$2,053,892	$2,393,686	$12,490,993
Total Variance		($563,532)	$483,684	($38,203)	$365,292	$247,240

*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 Our contact and cooperation rates remain stable, with a contact rate of 54% and participation rate of 61%.
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.
o The ODUSA has prepared a STAND-TO! Article that will be published in July, reminding Army leadership of the importance of STARRS.
- New technical systems.
o Our technical systems are performing well overall, although this month we experienced some issues which led to the delay in the launch of our Phase 5 (end game) work. We are assessing the problems and the team continues to work to increase efficiency and lower our project expenses.
o We had some problems with errors being made in the system rules and sample file setup this month. We are working to put in place additional quality control checks, and training additional staff to provide better backup; to avoid these types of problems in the future.
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 believe the safety plan issues have been worked out. We are continuing to monitor the situation. The ODUSA is scheduling a follow-up meeting with the Chief of Chaplains to discuss the situation.

Cost
Jun 14, 2017

Total Cost to Date (Direct + Indirect):	5,276,579.00
Estimated Cost at Completion (E$AC):	12,490,993.00
Total Budget:	12,738,233.00
Variance (Budget minus E$AC):	247,240.00
Reason For Variance:	We continue to adjust our costs each month, to reflect staffing and non-salary changes. This variance is less than 2% of the total five year budget. We will make adjustments in future months to ensure that we end the project with as close to a zero variance as possible.

Projections
Jun 14, 2017

Dollars Projected For Month:	388,422.00
Actual Dollars Used:	263,032.00
Variance (Projected minus Actual):	125,390.00
Reason For Variance:	Under-run categories include respondent payments, survey tech time, postage, and software. This is due to the fact that I assumed we would have a bit more of a lag in expenses hitting the books, and May costs would still reflect the larger sample sizes in replicates 13-14 (replicate 15 is the first replicate with the 52% Phase 1 sample release). We also discovered an error in our sampling rates, resulting in replicates 15 and 16 being smaller than they should have. This meant fewer interviews, and fewer respondent payments.

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

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

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

PreProduction Start:	04/01/2016	***Pretest Start:***	
Pretest End:		***Recruitment Start:***	07/01/2016
Staffing Completed:		***GIT Start:***	
SS Train Start:	10/17/2016	***SS Train End:***	
DC Start:	10/03/2016	***DC End:***	07/31/2017

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	June, 2017 (DMACS)	**Project Phase**	Implementing

Risk Level   *Some Concerns*

Monthly Update   During June 2017, SRO activities included the following:

Task 1: Management, Budget and Work Plan
• Budget estimates updated to reflect continued efforts

Task 2: Sampling
Task 3: Questionnaire Development
Task 4: CAI Programming

Task 5: Systems Programming
• Last of Wave 2 sample pushed to interviewers for reminder calling
• Preload adjusted on ongoing basis to allow proper data entry for PAPI returns

Tasks 6, 7: Interviewer Recruitment & Hiring, Training

Task 8: Main Data Collection
• Respondent Incentive payments processed on a weekly basis
• PAPI returns and data entry happening on an ongoing basis
• All mail and email reminders and interviewer reminder activity completed
• Wave 2 has 438 completed interviews – 303 web and 135 PAPI –as of June 28th

Task 9: Post Collection Processing
Task 10: Weighting
Task 11: Final Data Deliverables

Cost information: Kresge Foundation funding

Total survey funding awarded:	$	256,770
Total Expended as of 5/31/2017	$	263,535
Expected cost at complete	$	275,579
Expected Variance:	$	(18,810)

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. In addition, charges for Illume submissions were not included in the budget, and these add another $1000 in cost. The currently projected overrun is right about that ($18,810), as we continue to run late on the project. We expect June costs to reduce substantially as we wind the project down. 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 has proven to be challenging, both because we are well behind schedule and because Wave 1 had substantially higher PAPI response than was anticipated. Wave 2 has more web completes than PAPI, so that has helped keep data entry costs down.

• 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 proven successful, as currently 69% of the Wave 2 responses have come via web, compared to a 43% rate in Wave 1. Because it is a feasibility study, there was concern that protocol prescriptions (and budgeted costs) might negatively affect the overall (traditional) response rate for the study, especially since a decision was made with the PIs that for Wave 2 that we would seek to maximize the number of people who did the study online versus PAPI. At this point this concern appears not to be a substantial issue, as we are at 95% of our Wave 2 goal, and we were also able to move 100 respondents from PAPI to web with an extra incentive offer.

• The project continues to run behind schedule, but is starting to wind down. We have ended active data collection, though we will continue to accept interviews for a couple more weeks. We will meet with the PIs in mid-July and are targeting the end of July for final reports and data delivery.

Cost
Jun 07, 2017

Total Cost to Date (Direct + Indirect):	263,534.91
Estimated Cost at Completion (E$AC):	275,579.20
Total Budget:	256,769.00
Variance (Budget minus E$AC):	-18,810.20
Reason For Variance:	The cost estimate projects an overrun, due to inadvertent under-budgeting of interviewer hours and other expenses. This overrun has been reviewed by SRC, and will continue to be carefully monitored as the project progresses. The expected overrun was estimated to be $17,000, but we have also added Illume costs, which were not budgeted at the time the project began, and some remedial costs for Wave 2, so we expect the overrun to be closer to $20,000.

Projections
Jun 07, 2017

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	Data collection costs were pushed forward 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: 438 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

PreProduction Start: 01/16/2017		*Pretest Start:*
Pretest End:		*Recruitment Start:* 02/15/2017
Staffing Completed: 04/21/2017		*GIT Start:*
SS Train Start:		*SS Train End:*
DC Start: 05/01/2017		*DC End:* 10/30/2017

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   June, 2017 (EARDS)   **Project Phase**   Implementing

Risk Level   *On Track*

Monthly Update   The new phone protocol is fully out and functioning in the field. We've also noticed an increase in productivity with more scheduled interviews and fewer cancellations. We've added a new site in Macomb county (Biomed) and this seems to be working out well.

Special Issues   There was a flaw in the main instrument that was not allowing a small number of respondents to answer 'No' to one question. The issue has been identified and the fix is being tested now. This fix should be in place by the start of July.

Cost
Jun 08, 2017

Total Cost to Date (Direct + Indirect):	122,234.32
Estimated Cost at Completion (E$AC):	231,484.01
Total Budget:	234,871.00
Variance (Budget minus E$AC):	3,086.99
Reason For Variance:	We've paid less in respondent incentives than we expected so far. It looks like this situation will be corrected as our production has picked up in the last few weeks.

Projections
Jun 08, 2017

Dollars Projected For Month:	25,457.26
Actual Dollars Used:	22,035.55
Variance (Projected minus Actual):	3,421.71
Reason For Variance:	

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:	400		
Current actual:	205		
Estimate at Complete:			
Variance:			

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:	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. The respondent questionnaire length is expected to be 60 minutes. The informant questionnaire is expected to be 20 minutes and can be administered by telephone when the interviewer calls to set up an appointment with the respondent for the face-to-face interview.
SRO Project Period	01/2015 - 12/2017
Data Col Period	05/2016 - 02/2017
Security Plan	NA

Milestone Dates

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

Other Project Team Members:	Applications Programmers: Jeff Smith (STrak), Holly Ackerman (Webtrak, Weblog) 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	June, 2017 (HCAP 2016)	**Project Phase**	Implementing
Risk Level	*Some Concerns*		
Monthly Update	As of June 25th, there are 3,212 completed respondent interviews and another 2,957 informant interviews. Current Response/Completion Rates		

Sample	Response Rate	Completion Rate
Priority Sample	58.7%	89%
Total Sample (all)	72%	91%

We expect to get one final sample release in early to mid-July, and that release will include only HRS Proxy cases.

More interviewer left the project - current count of interviewers is 33.

We are planning to have interviewer debriefing meetings in July - although the project will not have ended we are close to the end and would like to get feedback from as many interviewers as possible before they move on to other projects.

Special Issues

Cost
Jun 30, 2017

Total Cost to Date (Direct + Indirect):	4,344,456.82
Estimated Cost at Completion (E$AC):	4,597,878.41
Total Budget:	4,476,719.00
Variance (Budget minus E$AC):	-121,156.42
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
Jun 30, 2017

Dollars Projected For Month:	155,102.13
Actual Dollars Used:	165,812.64
Variance (Projected minus Actual):	-10,710.51
Reason For Variance:	A lot of extra effort to increase the lower cognitive tier of the sample.

Measures

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

Other Measures

Project Name	Health and Retirement Study (HRS 2016)
Project Mode	Primary: Mixed Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 24,690,534.00 **InDirect Budget:** 8,888,593.00 **Total Budget:** 33,579,127.00
Principal Investigator/Client	David Weir (SRC) Mary Beth Ofstedal (SRC) Ken Langa (SRC)
Funding Agency	NIA
IRB	**HUM#:** HUM00061128 **Period Of Approval:** 1/15/2015 - 1/14/201
Project Team	**Project Lead:** Nicole G Kirgis **Budget Analyst:** Richard Warren Krause **Production Manager:** Stephanie Sullivan **Senior Project Advisor:** Mary P Maher **Production Manager:** Jennifer C Arrieta **Production Manager:** Piotr Dworak
Proposal #:	no data
Description:	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort will be added. A series of physical measures and biomarkers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records and Veterans Administration (VA) records is requested.
SRO Project Period	04/2015 - 06/2017
Data Col Period	02/2016 - 04/2017
Security Plan	NA

Milestone Dates

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

Other Project Team Members:	Rebecca Gatward (Survey Director), Sharon Parker (Production Management Coordinator), Frost Hubbard (New Cohort), Jennifer Kelley (Respondent Contact Coordinator), Jaime Koopman (Project Manager), Russ Stark (SSL Production Manager), Ian Ogden (Project Assistant), Dan Tomlin (Project Assistant), Lisa deRamos (Project Assistant), Daniah Buageila (Project Assistant)
Other Project Names:	
Sample Mgmt Sys	SurveyTrak; MSMS
Data Col Tool	Blaise 4.8
Hardware	Laptop
DE Software	NA
QC Recording Tool	DRI-CXM
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, prepaid (80.00)
Payment Method	Check through STrak RPay System

- -

Report Period	June, 2017 (HRS 2016)	**Project Phase**	Implementing
Risk Level	*Some Concerns*		

Monthly Update	During the month of June, data collection for the new cohort and panel components continued. A group of approximately 50 interviewers continues as our "panel closer" group, trying to finish panel data collection as soon as possible. Right now, it looks like we will hit a minimum response rate by the middle of August. In terms of New Cohort, screening is currently projected through October with baseline interviewing through December. However, we have a projected short fall of baseline interviews by the end of data collection. Strategies are being discussed/implemented.

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

Health and Retirement Study - 2017/18 technical development update – June 2017
Milestones
• Web pilot 'online' (MSMS + Blaise 5) - July 24, 2017, n=300
• CAPI mode pilot 'offline' - Late July/early August 2017 (field interviewers)
• Key decision point - Early September 2017 – systems and modes for 2018 (MSMS/B5/B4.8/ST) based experience and outcomes to that point.

Month update is attached.

Special Issues

Cost
May 31, 2017

Total Cost to Date (Direct + Indirect):	31,031,997.38
Estimated Cost at Completion (E$AC):	38,306,488.46
Total Budget:	33,579,127.00
Variance (Budget minus E$AC):	-4,727,361.46
Reason For Variance:	Projections have been refined to reflect additional training costs for June and to extend data collection for panel into mid-August and New Cohort into December 2017.

Projections
May 31, 2017

Dollars Projected For Month:	1,228,861.76
Actual Dollars Used:	894,298.89
Variance (Projected minus Actual):	334,562.81
Reason For Variance:	Actual dollars for the month of May came in under projections mostly due to training costs not hitting as planned. These costs have been pushed forward.

Measures

	Units Complete	RR	HPI
Current Goal:	23,569	85%	7.45
Goal at Completion:	23,569	85	7.45
Current actual:	20,052	70%	8.4
Estimate at Complete:	22,907	83	8.5
Variance:	-662	-2	-1.05

Other Measures

Goal for New Cohort is 5,228 interviews (expected: 5000)
Goal for Panel is 18,341 interviews, 85% (expected: 17,907, 83%)

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:	Housing & Children's Healthy Development
Sample Mgmt Sys	SurveyTrak; SMS; Illume
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 (CASO - scanning)
QC Recording Tool	DRI-CARI
Incentive	Yes, R; Yes, INF; Yes, Other (screening households)
Administration	SRO Group
Payment Type	Cash, prepaid ($5 for subsample, $2 prenotification); Cash, post ($75 adult, $50 child); Other (child gift <$5, Fir
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office

---

Report Period	June, 2017 (HCDC, H&C)	**Project Phase**	Implementing

Risk Level   *Some Concerns*

Monthly Update

During June 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, production issues
•   Invoicing
o   At the request of JHU, negotiated with UM OSRP to withdraw previous invoices, and prepare journal entries so that all expenses invoiced from Feb 2017 through June 2017 could be charged solely to the HUD grant.
o   Worked with JHU to revise language in DUA to allow modification to expense distribution across funding agencies in order to meet invoicing deadlines related to funding availability.
•   Reviewed/monitored spending compared to budget. Revised monthly projections.
•   Completed debriefing from May main study training.
•   Finalized specification for data deliverables. Reviewed all data deliverables.
•   Spanish Translations/Programming/Training
o   Reviewed Spanish language translations. Sent translations for adjudication.
o   Created specifications for Spanish-language programming, including Spanish version of Woodcock-Johnson assessments
o   Finalized format for all Spanish materials
o   Prepared and ordered Spanish supplies, finalized kitting instructions
o   Prepared agenda for Spanish-language training
•   IRB
o   Prepared and submitted UM IRB for Spanish-language training, email contact protocol.
o   Prepared and delivered materials for JHU IRB submission.
o   Began preparation of data security plan for UM IRB submission.
•   Specified and prepared production dashboards and weekly production reports.
•   Specified field reports for physical measures, SAQ completion, mailing operations, etc.
•   Conducted batch address/phone update for Voucher sample through Accurint.

Task 2: Sampling
% Task Spent to Date
•   Monitored production progress versus sampling assumptions
•   Specified and created initial production dashboard

Task 3: Questionnaire Development
% Task Spent to Date
•   Updated screener on-screen instructions for screener exit
•   Updated child interview specifications
o   Included more on-screen interviewer instructions for Hearts & Flowers (more introductory text)
o   Added interviewer instructions for obtaining consent signature if PCG is not the authorized signer for child
•   Updated specification for pulling completion variables/indicators from Blaise into SurveyTrak
•   Iterative testing for Spanish-language programming, including Spanish consent launch.
•   Iterative testing for Spanish version of Woodcock-Johnson tests.

Task 4: CAI Programming
% Task Spent to Date
•   Programmed Spanish Woodcock-Johnson Assessments. Conducted iterative testing/programming fixes as necessary
•   Programmed Spanish Screeners (Population & Voucher), PCG, Child surveys. Conducted iterative testing/programming fixes.
•   Programmed data pulls into SurveyTrak (for monitoring completion rates)

- Programmed interviewer instructions in Child interview

Task 5: Systems Programming
% Task Spent to date
- SurveyTrak Programming
o Specified and programmed data pulls from Blaise into SurveyTrak for monitoring completion rates
o Programmed address update tab
o Programmed Physical Measure booklet tab
o Updated pull of Daily Diary status to match presentation in Blaise
o Programmed "priority status" in Main project (pulling priority status from Screener)
o Fixed "safety" result code bug.
o Programmed/updated field reports
o Updated call wizard actions
- Web Log
o Added enhanced search fields (for various documents)
o Added comments fields on logging tabs
o Fixed minor bugs
- Loaded phone number updates for Voucher Sample
- Updated priority flags for Voucher Sample
- Triaged/managed interviewer technical issues
- Prepared initial data deliverables

Tasks 6, 7: Interviewer Recruitment & Hiring, Training
% Task Spent to Date
- Posted open interviewing position for Cleveland (at PI request).
- Made conference, travel reservations for Spanish language and refresher trainings

Task 8: Main Data Collection
% Task Spent to Date
- Prepared plan for Refresher training. Created agenda, training materials.
- Reviewed/monitored performance of interviewers. Created performance plans where necessary. Processed interviewer terminations and resignations.
- Conducted weekly Team Leader (TL) conference calls, weekly interviewing-team conference calls, and weekly one-on-one TL-Interviewer conference calls.
- Conducted reminder calling for Daily Diaries.
- Logged completed interview materials, dried blood spots.
- Cumulative production as of 6/30/2016:
o Completed
  □ 308 Screener interviews (with eligible respondents), identified 585 ineligible households, 192 non-sample addresses
  □ 149 PCG interviews
  □ 152 Child interviews
  □

Task 9: Post Collection Processing
% Task Spent to Date
- Finalized programming for household SAQs.

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

Task 11: Final Data Deliverables
% Task Spent to Date

Special Issues

Areas of Concern:

• Hours per screener for the Voucher Sample are running higher than budgeted. This is particularly true in Cleveland, where the sample addresses are much older. We received permission to complete batch locating on the voucher cases, and released 167 phone number for the CMHA sample and 151 numbers for the DHA sample. We will continue to monitor the Voucher sample carefully. However, without a respondent locating budget and work authorization, we are concerned that we will be unable to either adequately follow up with voucher sample, or that we will need to complete more of the voucher screeners in person (as opposed to by telephone) than budgeted for.

• 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 to SRC by JHU 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.

• Coming out of the Pilot, SRC's cost analysis indicated that having an adult (PCG) interview approximately 13 minutes longer than originally projected (for voucher sample, we had projected 85 minutes) could be accommodated within our hours per interview (HPI) projections. However, early Main study timings indicate that the changed consent procedures have added significantly to the overall timings, above and beyond the 13 minutes. This includes adding about 8 minutes to the consenting and receipt management, and another 5-8 minutes primarily for revised social security forms. It is unclear what the impact of this additional respondent burden will be on cooperation rates and cost per interview.

• The rate of return for the Child Time Diary is better than it was in the Pilot, however it is still lower than desired for the project, 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. SRC is emphasizing the importance of the diary in the July refresher trainings with interviewers.

• Rates of return of the Household SAQ are lower than in the Pilot, and are lower than desired for the study overall. SRC is emphasizing the importance of the SAQs to interviewers in the July refreshers trainings, and is also emphasizing proper document shipping protocols.

• PCG dried blood spot collection is adequate, and participation rates are high. Child consent/assent rates are far higher than in the Pilot. However interviewers (even experienced interviewers) are unable to completely fill spots on the collection cards. A refresher on DBS collection is included in the July refresher training. Trainers will gather information from interviewers on respondent reactions, procedures, and possible future protocol improvements.

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
Jun 16, 2017

Total Cost to Date (Direct + Indirect):	2,347,124.00
Estimated Cost at Completion (E$AC):	10,743,019.00
Total Budget:	10,743,019.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	

Projections
Jun 16, 2017

Dollars Projected For Month:	874,949.00
Actual Dollars Used:	328,808.00
Variance (Projected minus Actual):	546,141.00
Reason For Variance:	Many large expenses for training & pre-production have not yet hit the books. Still outstanding $71,000 for kitting, $280,000 for hosting/conference expenses, as well as all interviewer hours and travel to and from training. Similarly, respondent costs have not yet been expensed, nor any production travel. This is likely due to the timekeeping schedule, and the date interviewers began work.

Measures

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

Other Measures

Project Name	HRS 2017 Consumption and Activity Mail Study (CAMS 2017)
Project Mode	Primary: Mail Total of Modes: 1

Project Type	Sponsored Projects	**Project Status**	Current

Budget	**Direct Budget:**	292,414.00	**InDirect Budget:**	105,269.00	**Total Budget:** 397,683.00

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

Funding Agency

IRB	**HUM#:**	HUM00079949	**Period Of Approval:** 4/13/2017 - 4/12/201
Project Team	**Project Lead:**	Daniel Tomlin	
	Budget Analyst:	Richard Warren Krause	
	Production Manager:		
	Senior Project Advisor:	Mary P Maher	
	Production Manager:		
	Production Manager:		

Proposal #:	no data
Description:	CAMS is part of the Health and Retirement Study (HRS). The goal of CAMS is to gather additional data on household consumption and activities of daily living from participants in the HRS. In 2017, a paper questionnaire will be mailed to approximately 8,000 respondents of which 6,000 will receive the full questionnaire and 2,000 spouse/partners will receive a brief questionnaire.
SRO Project Period	06/2017 - 05/2018
Data Col Period	09/2017 - 04/2018
Security Plan	Yes
Milestone Dates	

PreProduction Start:	05/22/2017	**Pretest Start:**	
Pretest End:		**Recruitment Start:**	
Staffing Completed:		**GIT Start:**	
SS Train Start:		**SS Train End:**	
DC Start:	09/20/2017	**DC End:**	04/30/2018

Other Project Team Members:	Actual budget analyst is Grace Tison but she is not available in the drop-down list. Data Manager: Qi Zhu Project Assistant: Jeannie Baker Programmer: Holly Ackerman Assembly Coordinator: Vicki Wagner Project Manager: Jennifer Arrieta
Other Project Names:	CAMS
Sample Mgmt Sys	Other (Weblog)
Data Col Tool	SAQ
Hardware	Paper and Pencil
DE Software	Other (HRS study staff is responsible for data entry)
QC Recording Tool	N/A
Incentive	Yes, R; Yes, Other (spouse)
Administration	SRO Group
Payment Type	Check, prepaid ($25 to main R and $10 to spouse R)
Payment Method	Check through STrak RPay System

- -

Report Period	June, 2017 (CAMS 2017)	**Project Phase**	Planning
Risk Level	*On Track*		
Monthly Update	CAMS preproduction activities have started in June. The budget and projections were set up in CRS, project management plan, schedule, and charter were drafted. Respondent contact materials revisions are underway and technical specs are being updated and weblog programming has started. Resources have been assigned to the project.		

Special Issues   The budget is based on a sample of HRS Panel respondents but study staff has yet to decide whether to include New Cohort respondents.

Cost
May 31, 2017

Total Cost to Date (Direct + Indirect):	445.70
Estimated Cost at Completion (E$AC):	398,706.96
Total Budget:	397,683.00
Variance (Budget minus E$AC):	-1,023.96
Reason For Variance:	Initial projections with an estimated sample size and not all team members have been named.

Projections
May 31, 2017

Dollars Projected For Month:	0.00
Actual Dollars Used:	445.70
Variance (Projected minus Actual):	445.70
Reason For Variance:	Projections added to CRS in June

Measures

	Units Complete	RR	HPI
Current Goal:		70%	
Goal at Completion:		70%	
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:	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. 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. 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. 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: • 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

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

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

Other Project Names:

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

Report Period	June, 2017 (HRS LHMS 2017) **Project Phase** Implementing
Risk Level	*On Track*

Monthly Update

SAQ	Complete	Refused	Deceased
English	2689	132 29	total sample: 5174
Spanish	53	2	
Total	2742	134 29	

We have received production data back from CASO. HRS is currently working with CASO to verify that we can proceed with full data scanning. We've also pushed back the mailing of the first Spanish reminders as well as the English postcard reminders due to the holiday.

Schedule:

English	Spanish	
05/24/2017	06/21/2017	Invitation letters
06/21/2017	07/12/2017	First Reminder letters
07/12/2017	08/02/2017	Thank you/Reminder Postcards
07/21/2017	08/20/2017	Final Reminder letter

Special Issues

Cost
May 11, 2017

Total Cost to Date (Direct + Indirect):	242,737.37
Estimated Cost at Completion (E$AC):	490,825.76
Total Budget:	523,997.55
Variance (Budget minus E$AC):	33,171.24
Reason For Variance:	Some of the work CASO has done to organize and implement the data collection hit the budget at the end of June. These figures will dramatically reduce the variance that we are currently seeing. We also spent more than expected in postage for the second English mailing. I expect these numbers will balance out for next month.

Projections
May 11, 2017

Dollars Projected For Month:	9,215.58
Actual Dollars Used:	4,824.22
Variance (Projected minus Actual):	4,391.36
Reason For Variance:	Some CASO charges were not reflected in this month due to our delay in the start of data collection. These charges hit at the end of June and will balance out with the projected totals for next month.

Measures

	Units Complete	RR	HPI
Current Goal:	3000	55	
Goal at Completion:	3500	70	
Current actual:	2742	53	
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 Start:***	
Pretest End:		***Recruitment Start:***	01/26/2015
Staffing Completed:		***GIT Start:***	
SS Train Start:		***SS Train End:***	
DC Start:	03/02/2015	***DC End:***	05/31/2016

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

Other Project Names:

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

--- --- --- --- --- --- --- --- --- --- --- --- --- --- ---

Report Period	June, 2017 (MTTS)	**Project Phase**	Closing

Risk Level *On Track*

Monthly Update During June, 2017, SRO activities included the following:

Task 1: Management, Budget and Work Plan
- Revised monthly projections
- Prepared monthly report
- Evaluated underrun status. Coordinated with EWB regarding disposition of underrun.

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
- Participated in meetings. Responded to research team questions about MKT sample weights.

Task 11: Final Data Deliverables

Task 12: Video Storage Systems (EWB)

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.

We have permission from Barb Gilbert at Harvard to use the overrun for SRO and EWB expenses. EWB will overrun its part of the budget allocation.

Special Notes:

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

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

Special Issues

Cost
Jun 16, 2017

Total Cost to Date (Direct + Indirect):	967,835.00
Estimated Cost at Completion (E$AC):	990,857.00
Total Budget:	1,019,417.00
Variance (Budget minus E$AC):	25,559.00
Reason For Variance:	Very low response rates to the video data collection resulted in lower than anticipated costs. We have negotiated with Harvard to spend down the overrun as much as possible, funding work by EWB.

Projections
Jun 16, 2017

Dollars Projected For Month:	2,060.00
Actual Dollars Used:	2,878.00
Variance (Projected minus Actual):	817.00
Reason For Variance:	Our sampling team charged slightly more hours than projected.

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 Illume Web 2017)		
Project Mode	Primary: Mixed Total of Modes: 2		
Project Type	Sponsored Projects	**Project Status**	Current
Budget	**Direct Budget:** 105,732.94	**InDirect Budget:** 58,153.12	**Total Budget:** 163,886.06
Principal Investigator/Client	Megan Patrick (UM-SRC)		

Funding Agency

IRB	**HUM#:**	**Period Of Approval:**
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:	This project is a continuation of MTF-WPSP Year 2/MTF Illume Web 2016. A new project is being created in MPR because the Project required a new PG.
	For this round of data collection we have 2 conditions:
	1. Paper - URL with credential provided if not complete after 1 month, or URL provided if requested
	2. Web - Paper provided if requested or if not complete after 1 month
	Note - Both conditions are eventually given each option if not completed
SRO Project Period	05/2017 - 12/2017
Data Col Period	05/2017 - 09/2017
Security Plan	NA

Milestone Dates

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

Other Project Team Members:	Gina-Qian Yang Cheung, Donnalee Grey-Farquharson, Hueichun Peng, Lloyd Hemingway, Shaowei Sun (year 3 only), Jennie Williams, Peter Sparks, Dave Dybicki, Ashwin Dey
Other Project Names:	MTF Web
Sample Mgmt Sys	SMS; Web SMS; Illume
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, Other (Managed by SRC Study Staff)
Administration	NA
Payment Type	N/A
Payment Method	N/A

Report Period	June, 2017 (MTF Illume Web 2017)	**Project Phase**	Implementing
Risk Level	Not Rated		
Monthly Update	Budget not finalized/uploaded- MPR will be updated when the budget is finalized.		
	Non-response (NR) training was held June 9th - 5 Interviewers and 2 TLs were trained. NR calling began June 12th.		
Special Issues			

Cost
May 31, 2017

Total Cost to Date (Direct + Indirect):	15,465.07
Estimated Cost at Completion (E$AC):	163,886.06
Total Budget:	163,886.06
Variance (Budget minus E$AC):	0.00
Reason For Variance:	

Projections
May 31, 2017

Dollars Projected For Month:	16,208.81
Actual Dollars Used:	15,405.02
Variance (Projected minus Actual):	803.79
Reason For Variance:	

Measures

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

Other Measures

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

Project Status   Current

Budget	**Direct Budget:**	503,578.00	**InDirect Budget:** 276,969.00	**Total Budget:**	780,547.00

Principal Investigator/Client	Richard Miech (UM-SRC)
Funding Agency	National Institute on Drug Abuse (NIDA). Fall 2015-only budget, direct: $67,163.00; Indir:$36,940.00; Total:$104,103.00
IRB	**HUM#:** HUM00112493 **Period Of Approval:** 3/1/2017 - 2/28/2018

Project Team

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

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

Milestone Dates

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

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

- -

Report Period	June, 2017 (MTF Tablet Pilot) **Project Phase** Implementing
Risk Level	On Track
Monthly Update	In June:

Minako worked on the spring 2017 data processing.

Daric worked on consolidating supply, invoice, vendor information

SRO proposals and Meredith provided ballpark budgets for for 2018 1/2 schools moving to tablet and 2019 all schools moving to tablet. Stephanie and Meredith met with Richard and Nick P on 6/13 to review the ballparks and other cost modeling documents. We provided ballparks for two more options on 6/26. They had a PI meeting on 6/27.

We indicated that in order to start work in August and make the timeline for spring 2018, we would need a budget and scope decision by mid-July.

Special Issues

Cost
Jun 30, 2017

Total Cost to Date (Direct + Indirect):	994,285.65
Estimated Cost at Completion (E$AC):	1,032,652.70
Total Budget:	780,547.00
Variance (Budget minus E$AC):	-316,829.78
Reason For Variance:	5-year grant ended 4/30/2017 and a new grant effective 5/1/2017 was 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 old 4/30/2017 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: $979,926.77
Cost at completion: $979,926.77
Projections: $0
Variance: $-264,103.77

PG starting 5/1/17:
Budget: $0
Total cost to date: $14,358.88
Cost at completion: $52,726.01
Projections: $19,025.37
Variance: $-52,726.01

Projections
Jun 30, 2017

Dollars Projected For Month:	7,321.44
Actual Dollars Used:	8,024.99
Variance (Projected minus Actual):	-703.55
Reason For Variance:	

Measures

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

Other Measures

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

Project Status   Current

Budget	**Direct Budget:** 32,653,126.47 **InDirect Budget:** 8,448,262.00 **Total Budget:** 41,101,388.47
Principal Investigator/Client	Joyce Abma (NCHS) Mick Couper (ISR)
Funding Agency	NCHS, CDC, NICHD
IRB	**HUM#:** 0002716 **Period Of Approval:** 7/17/13 - 7/17/17
Project Team	**Project Lead:** Heidi Marie Guyer **Budget Analyst:** Nancy Oeffner **Production Manager:** Theresa Camelo **Senior Project Advisor:** Mary P Maher **Production Manager:** Maureen Joan O'Brien **Production Manager:** Rebecca Loomis
Proposal #:	no data
Description:	The NSFG is a national survey of women and men 15-49 years of age designed to provide national estimates of factors affecting pregnancy and birth rates, including sexual activity, cohabitation, marriage, divorce, contraceptive use, miscarriage and stillbirth, infertility, and use of medical services for family planning and infertility. NSFG 2010-2020 includes eight years of continuous data collection starting in September 2011 and ending in 2019. Every year, new PSUs will be selected to replace last year's non-self representing PSUs and self-representing PSUs, and the project will continue to collect data from a set of major self representing PSUs throughout the entire data collection period. Target number of interviews is approximately 5000 per year.
SRO Project Period	09/2010 - 07/2020
Data Col Period	09/2011 - 06/2019
Security Plan	Yes

Milestone Dates

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

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	June, 2017 (NSFG 2010-2020) **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	We are now in Week 2 of Q24. Due to lower Screener Completion rates and low yield throughout Q23, Q23 was extended by 4 days in 7 areas. As a result we were able to increase yield from 1190 on the last day of the quarter, to 1203 main interviews. Iwers extended the quarter only if they worked extra hours so that they did not get behind on Q24 sample. 5 staff have attritted since the beginning of last quarter. Interviewers are traveling to unstaffed areas for coverage. NCHS and Michigan continue to gear up for the late August 2017 Interviewer training in which approximately 40 Interviewers will be trained. Recruitment for On-Staffers began early May and was closed Friday May, 19. The New Hire recruitment site opened 5/22 and will close on 7/10. 13 New Hires have been hired so far and we expect to hire 15 more. 4 may be On Staffers. NCHS is still on track for finalizing Y7 Blaise instrument changes by

the sign-off date, June 30th, 2017. Then, SRO will prepare mock interviews for the Y7 training.   Project Management and Procurement have collected all necessary documentation to secure Fieldprint, our digital contracting contractor, for the August training. Although the details for payment are still being worked out, University Procurement and Fieldprint have agreed on a price and fingerprinting services have been confirmed for August 28th.   Project management staff has been working with TSG to add custom interviewer FPR's to SurveyTrak which will include statistics from the current year only, and be tailored to individual Iwers. We are considering introducing the use of smartphones again. CMT is looking at any possible security issues for using smartphones, such as the security of GPS apps. The Paper Screener experiment started at the beginning of this quarter. We have received 34 completed papers screeners in the mail out of 300 that were sent, exceeding the number estimated and the number needed for the experiment to be cost-neutral. At the start of week 3, experimental lines that have not returned the paper screener will be released to Interviewers to work. The phase boundary experiment still has not been submitted by NCHS to their ERB.   We continue to test and fine tune the Electronic Document Utility (EDU) in SurveyTrak for signing receipt forms and consent forms. We were hoping to implement these changes in Q24, but this has been pushed to Y7 due to the time needed to program, test, and train. A contract modification providing additional funding to the year 6 budget was received from NCHS-CDC this month. NCHS submitted revisions to project materials, including brochures, letters and the Family Fact sheet, and the year 7 questionnaire for ERB review.

Special Issues	UM received the contract modification from NCHS to allocate $800,535 in additional funding for the current year (through August 2017).

Cost
Jun 08, 2017

Total Cost to Date (Direct + Indirect):	29,908,712.26
Estimated Cost at Completion (E$AC):	43,146,817.00
Total Budget:	41,101,388.47
Variance (Budget minus E$AC):	2,034,947.00
Reason For Variance:	Additional workscope, higher than anticipated HPI, higher yield, higher interviewer attrition, increased travel, increased hiring and training

Projections
Jun 08, 2017

Dollars Projected For Month:	480,045.11
Actual Dollars Used:	427,358.97
Variance (Projected minus Actual):	52,686.14
Reason For Variance:	Fewer interviewer hours than projected, delay in travel expenses and respondent payments.

Measures

	Units Complete	RR	HPI	
Current Goal:	75	23%	9.0	
Goal at Completion:	1300	79%	9.0	
Current actual:	77	13.3%	14.7	
Estimate at Complete:	1260	61.8%	10.2	
Variance:	70	18.2%	1.2	

Other Measures	The goals represent Q24 goals and actuals. We are now in Week 2 of Quarter 24. HPI is slightly elevated due to Q23 extention hours being included in Q24 statistics.

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:	Peter Rakesh Batra
Production Manager:	

Proposal #:   no data

Description:

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

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

SRO Project Period	04/2014 - 03/2018
Data Col Period	03/2015 - 01/2016
Security Plan	Yes

Milestone Dates

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

Other Project Team Members:

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

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

— —

Report Period	June, 2017 (AHRB)	**Project Phase**	Implementing

Risk Level   *On Track*

Monthly Update

In June the project began phoning R2&R3 respondents who had either not started or had not completed both sessions of the study. To date, this effort has resulted in an additional 67 completes and many of those Respondents who we did not have en email address for have now been contacted via phone and they have receive an invitation email. We are now at approx 29% RR for R2&3. The phoning will continue into July and as we max out on the number of phone contacts the team will start Facebook messaging. The SRO SHRB team as presented at a Project Review Meeting this month. I have also continued to reflect on procedures for Wave 3 and have had a preliminary meeting with Ed to further discuss ideas. The plan is to find a balanced solution for Wave 3 that stays within the budget yet achieves the maximum number of responses.

Special Issues

Cost
May 31, 2017

Total Cost to Date (Direct + Indirect):	1,193,941.35
Estimated Cost at Completion (E$AC):	1,450,092.83
Total Budget:	1,427,000.00
Variance (Budget minus E$AC):	-23,092.83
Reason For Variance:	

Projections
May 31, 2017

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

Measures

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

Other Measures

Project Name	Optimizing Youth Suicide Risk Screening and Triage In the Emergency Department (YRS)
Project Mode	Primary: Telephone Total of Modes: 1

Project Type	Sponsored Projects		**Project Status**	Current

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

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

Funding Agency

IRB	**HUM#:**		**Period Of Approval:**	
Project Team	**Project Lead:**	Esther H Ullman		
	Budget Analyst:	Janelle P Cramer		
	Production Manager:			
	Senior Project Advisor:	Kirsten Haakan Alcser		
	Production Manager:			
	Production Manager:			

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

SRO Project Period	03/2015 - 12/2017
Data Col Period	07/2015 - 07/2017
Security Plan	NA

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

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

Report Period	June, 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 2 development later this summer. Meetings were held with Boys Town (to review changes to Safety Protocol), PECARN (to discuss changes in data model) and with PI (to review Study 2 goals). A de-brief with		

Study 1 interviewers is scheduled for June and training will be held in September.

Special Issues

Cost
Jun 30, 2017

Total Cost to Date (Direct + Indirect):	992,821.86
Estimated Cost at Completion (E$AC):	1,967,666.49
Total Budget:	1,979,245.00
Variance (Budget minus E$AC):	11,578.51
Reason For Variance:	Not all details for Study 2 are finalized so leaving some funds unallocated if needed for programming, training, etc.

Projections
Jun 30, 2017

Dollars Projected For Month:	20,536.02
Actual Dollars Used:	12,740.82
Variance (Projected minus Actual):	7,795.20
Reason For Variance:	We are in a "pause" between Study 1 and 2 and staff have been careful to minimize charges to the project during this phase

Measures

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

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

Project Name	Panel Study of Income Dynamics - Transition to Adulthood Study 2017 (PSID TAS 2017)
Project Mode	Primary: Telephone Total of Modes: 1
Project Type	Sponsored Projects

		Project Status	Current

Budget	*Direct Budget:*	1,222,666.00	*InDirect Budget:*	682,169.00	*Total Budget:*	1,904,835.00

Principal Investigator/Client Narayan Sastry (SRC-PSID)

Funding Agency

IRB	*HUM#:*	HUM00112629	*Period Of Approval:*	12/9/2016-12/8/2017

Project Team
- *Project Lead:*
- *Budget Analyst:*
- *Production Manager:*
- *Senior Project Advisor:*
- *Production Manager:*
- *Production Manager:*

Proposal #: no data

Description: The Transition to Adulthood Study (TAS) is a supplemental study of the PSID, a national, longitudinal study of families started in 1968.
The TAS study began in 2005 and has been conducted every 2 years. The sample for PSID-TAS is comprised of a sample of participants from PSID Core in between the ages of 18 and 28, including Heads/Spouses/Partners and OFUMs. The sample size is approximately 3,014. The study is interviewer administered and phone only. Respondents are invited to complete the phone survey after they have completed the PSID Main interview. The interview content includes questions about education, wealth, health, income and other topics related to the traditional markers of the transition into adulthood – mainly entering the labor market, completing schooling, and planning one's own family formation.

SRO Project Period	05/2017 - 06/2018
Data Col Period	10/2007 - 05/2018
Security Plan	NA

Milestone Dates

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

Other Project Team Members:	
Other Project Names:	
Sample Mgmt Sys	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, R
Administration	NA
Payment Type	Check, post (70)
Payment Method	Check through other system (PSID RAPS)

- -

Report Period	June, 2017 (PSID TAS 2017)	**Project Phase**	Planning
Risk Level	*Not Rated*		

Monthly Update TAS 17 does not yet have a final budget. SRO has been worked closely with the PSID PIs to rebudget the project to reflect the interviewer-only administration of the survey. The original budget had included a mixed-mode design. SRO working currently on this rebudget and hope to have a budget soon.

Other work in May and June included technical programming of the questionnaire and development of systems. In May and June, SRO also began to develop plans for a pretest in July of approximately 75 Rs in a convenience

sample.

Special Issues   SRO still does not have a final budget for the TAS 17 work.

Cost
Jun 30, 2017

Total Cost to Date (Direct + Indirect):	0.00
Estimated Cost at Completion (E$AC):	0.00
Total Budget:	1,904,835.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	

Projections
Jun 30, 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	PSID Immigrant Refresher Screening Project (PSID-Imm)
Project Mode	Primary: Telephone Secondary: Face to Face Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	***Direct Budget:*** 1,226,546.00 ***InDirect Budget:*** 674,666.00 ***Total Budget:*** 1,901,212.00
Principal Investigator/Client	Narayan Sastry (SRC)
Funding Agency	NICHD
IRB	***HUM#:*** HUM00062417 ***Period Of Approval:*** 3/13/17-3/12/18
Project Team	***Project Lead:*** Rachel Anne Orlowski
	Budget Analyst:
	Production Manager: Sara D Freeland
	Senior Project Advisor: Stephanie A Chardoul
	Production Manager:
	Production Manager:
Proposal #:	no data
Description:	Screening Housing Units (that HRS-2016 determined were ineligible for their study and had at least one household member born outside of the U.S. and came to the U.S. in the past 20 years) to determine whether either the Head or Spouse/Partner of each Family Unit moved to the U.S. after 1997. Eligible Family Units are invited to participate in PSID Core 2017.
SRO Project Period	01/2016 - 09/2017
Data Col Period	06/2016 - 09/2017
Security Plan	NA

Milestone Dates

PreProduction Start:	01/04/2016	***Pretest Start:***	
Pretest End:		***Recruitment Start:***	03/24/2016
Staffing Completed:	06/23/2017	***GIT Start:***	
SS Train Start:	06/01/2016	***SS Train End:***	06/30/2017
DC Start:	06/06/2016	***DC End:***	

Other Project Team Members:	
Other Project Names:	
Sample Mgmt Sys	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	DRI-CARI
Incentive	Yes, R
Administration	ISR Group (PSID)
Payment Type	Check, post ($10, $40 End Game); Cash, prepaid ($5 End Game); Cash, post ($10); Other (Non-monetary ince
Payment Method	Check through STrak RPay System; Imprest Cash Fund from ISR Business Office

Report Period	June, 2017 (PSID-Imm) **Project Phase** Implementing
Risk Level	*Some Concerns*
Monthly Update	Continued FTF effort and overnight travel. Continued End Game; Batch 2 was first batch with Vumber numbers--Vumber used when available. Trained one Core TL/locator and two Core Training 2 interviewers (all bilingual) on 6/28 - 6/30 via webinar. At 6/28 PI meeting, decided we did not have to travel to small/remote PSUs or to travel back to PSUs with only a few remaining lines; decided to end FTF effort on 8/7. Core released Batch 2 of New IMM sample on 6/12 (n=100).
Special Issues	

Cost
Jun 30, 2017

Total Cost to Date (Direct + Indirect):	1,363,271.15
Estimated Cost at Completion (E$AC):	1,567,390.16
Total Budget:	1,901,212.00
Variance (Budget minus E$AC):	333,821.84
Reason For Variance:	Less programming, no new-hire recruitment, smaller in-person training, fewer lines--in fewer areas, fewer iwers

Projections
Jun 30, 2017

Dollars Projected For Month:	97,100.58
Actual Dollars Used:	98,359.90
Variance (Projected minus Actual):	-1,259.32
Reason For Variance:	minor estimation error

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:	872	60%	
Current actual:	845	58%	6.1
Estimate at Complete:	872	60%	
Variance:	0	0	

Other Measures

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:	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.
	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).
	Sample: Participants in Wave 3 of Social Relations (2014) from the Detroit tri-county area.
	Data collection period: estimated for 13 weeks but both the staffing levels and the proposed data collection pace is being discussed with the client given the availability of the wereable devices.
SRO Project Period	12/2016 - 10/2017
Data Col Period	06/2017 - 09/2016
Security Plan	NA

Milestone Dates

PreProduction Start: 03/01/2017		**Pretest Start:** 06/27/2017	
Pretest End: 09/28/2017		**Recruitment Start:** 11/01/2017	
Staffing Completed: 12/21/2017		**GIT Start:** 07/10/2017	
SS Train Start: 01/29/2018		**SS Train End:** 02/02/2018	
DC Start: 02/04/2018		**DC End:** 07/29/2018	

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	June, 2017 (SWEL)	**Project Phase**	Implementing
Risk Level	*On Track*		
Monthly Update	SWEL client Pilot was supposed to launch on 6/13 but was delayed until 6/20 after a) the first round of EMA tests conducted 6/6 - 6/10 was unsuccessful and b) client scheduling team has not been able to book anyone for the first		

week. The TSG team has fixed the EMA protocol and the pilot was off to a successful start. Two participants completed the pilot in June. EMA completion rate is at 82%.

The budget was reviewed with the client - having used 41% of the tech budget allocated to the entire project, we need to make some decisions about the robustness of the EMA system. We left the budget review meeting with good understanding on both sides of contributing factors to the current budget and the cost-saving alternatives that are being explored moving forward.

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 None at the moment.

Cost
May 31, 2017

Total Cost to Date (Direct + Indirect):	86,025.45
Estimated Cost at Completion (E$AC):	683,648.00
Total Budget:	683,647.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	

Projections
May 31, 2017

Dollars Projected For Month:	14,005.64
Actual Dollars Used:	19,917.86
Variance (Projected minus Actual):	-5,912.22
Reason For Variance:	Programming time needed to launch pilot was higher than expected due to last minute changes in configuration of the system, need to redeploy Blaise and reconfigure scripts.

Measures

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

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

Project Name	Surveys of Consumer Attitudes (SCA 2017)			
Project Mode	Primary: Telephone Total of Modes: 1			
Project Type	Sponsored Projects		**Project Status** Current	
Budget	***Direct Budget:*** 859,872.00	***InDirect Budget:*** 0.00	***Total Budget:*** 859,872.00	

Principal Investigator/Client   Dr. Richard T. Curtin (SRC)

Funding Agency   Bloomberg, others for Riders.

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

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

Proposal #:   no data

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

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

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

Milestone Dates

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

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

Other Project Names:

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

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

Risk Level   *Some Concerns*

Monthly Update   SCA completed its June study on time, finishing with 605 completed interviews with the desired split: 402 RDDs and 203 Recons. This was done with a longer instrument of 35.9 minutes in length. We ended up using 2313.6 interviewer hours and an disappointingly high 3.82 HPI, pretty much the same as last June. SCA delivered a very solid prelim total of 398 completes, but struggled post-prelim, needing to add interviewer hours and put more dials on sample lines in order to finish. SCA conducted another new interviewer hiring and training, adding a total of five new interviewers for the July study month. SCA continued to use its changed training process, which incorporates a section-by-section certification process into it, and indications continue to be positive.

Special Issues   SCA continues to run higher than expected on HPI and on interviewer attrition. This is pushing up costs, and we are working on a variety of fronts to try to bring costs back down.

Cost
Jun 14, 2017

Total Cost to Date (Direct + Indirect):	432,970.77
Estimated Cost at Completion (E$AC):	963,147.11
Total Budget:	859,872.00
Variance (Budget minus E$AC):	-103,275.11
Reason For Variance:	Interviewer hours are overall running much higher than expected.

Projections
Jun 14, 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:	605	7	3.82
Variance:	5	-2	0.42

Other Measures