

Survey Research Operations

Monthly Project Report

Sponsored Projects

August 2017



Sponsored Projects

(ABCD) Adolescent Brain Cognitive Development
(A-STARRS LS) Army Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study
(CogEcon Web) CogEcon 2016 Web
(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
(SCIP-2017) Sustainability Cultural Indicators Program-2017

Project Name	Adolescent Brain Cognitive Development (ABCD)												
Project Mode	Primary: Mixed	Secondary: Mixed	Total of Modes: 2										
Project Type	Sponsored Projects	Project Status	Current										
Budget	Direct Budget: 277,805.00	Indirect Budget: 0.00	Total Budget: 430,596.00										
Principal Investigator/Client	Mary Heitzeg (UM Dept of Psychiatry)												
Funding Agency	NIH												
IRB	HUM#: HUM00106316	Period Of Approval:	9/10/2015-1/7/2017										
Project Team	Project Lead: Karin Schneider Budget Analyst: Janelle P Cramer Production Manager: _UnAssigned Senior Project Advisor: Stephanie A Chardoul Production Manager: _UnAssigned Production Manager: _UnAssigned												
Proposal #:	no data												
Description:	<p>ABCD is a longitudinal study of about 10,000 children from ages 9-10 through early adulthood to assess factors that influence individual brain development trajectories and functional outcomes. UM Dept of Psychiatry is one of 19 research sites across the country.</p> <p>Sampling statisticians from our Stat and Methods Unit identified all public and private schools with children aged 9-10 within the geographic catchment area for each site. This activity was under a separate contract and the initial selection of four replicates has been distributed to all research sites. SRO received an electronic data file listing all selected schools in the UM catchment area.</p> <p>SRO will target the recruitment of 54 schools from Michigan, who will consent to distribute recruitment letters to parents for participation in the ABCD study. Respondent contact information will be returned directly to the Michigan research team for additional activities, including screening for eligibility. (Parents return cards with their contact information directly to the PI's staff.)</p>												
SRO Project Period	05/2016 - 03/2018												
Data Col Period	05/2016 - 02/2018												
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%;"> <tr> <td>PreProduction Start: 05/15/2016</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start: 05/20/2016</td> </tr> <tr> <td>Staffing Completed: 05/20/2016</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start:</td> <td>SS Train End:</td> </tr> <tr> <td>DC Start: 05/20/2016</td> <td>DC End: 02/28/2018</td> </tr> </table>			PreProduction Start: 05/15/2016	Pretest Start:	Pretest End:	Recruitment Start: 05/20/2016	Staffing Completed: 05/20/2016	GIT Start:	SS Train Start:	SS Train End:	DC Start: 05/20/2016	DC End: 02/28/2018
PreProduction Start: 05/15/2016	Pretest Start:												
Pretest End:	Recruitment Start: 05/20/2016												
Staffing Completed: 05/20/2016	GIT Start:												
SS Train Start:	SS Train End:												
DC Start: 05/20/2016	DC End: 02/28/2018												
Other Project Team Members:													
Other Project Names:	Adolescent Brain Cognitive Development												
Sample Mgmt Sys	NA												
Data Col Tool	NA												
Hardware	NA												
DE Software	NA												
QC Recording Tool	NA												
Incentive	NA												
Administration	NA												
Payment Type	NA												
Payment Method	NA												

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

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

Monthly Update	We confirmed that our recruitment goal increased. We should still be okay with the budget that was originally allocated. Uploading my projection doc.
-----------------------	---

Special Issues

NONE

Cost

Aug 07, 2017

Total Cost to Date (Direct + Indirect): 162,664.00
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

Aug 07, 2017

Dollars Projected For Month: 5,000.00
Actual Dollars Used: 3,300.00
Variance (Projected minus Actual): 0.00
Reason For Variance: Low activity due to summer

Measures

	Units Complete	RR	HPI
<i>Current Goal:</i>	54		
<i>Goal at Completion:</i>	TBD		
<i>Current actual:</i>	68		
<i>Estimate at Complete:</i>	88		
<i>Variance:</i>			

Other Measures

Project Name	Army Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study (A-STARRS LS)												
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 3										
Project Type	Sponsored Projects	Project Status	Current										
Budget	Direct Budget: 8,218,215.00	Indirect Budget: 4,520,018.00	Total Budget: 12,738,233.00										
Principal Investigator/Client	James Wagner (University of Michigan) Robert Ursano (Uniformed Services University of the Health Scienc) Murray Stein (University of California San Diego)												
Funding Agency	Department of Defense												
IRB	HUM#: HUM00099203	Period Of Approval:	2/18/2016-2/17/2017										
Project Team	Project Lead: Nancy J Gebler Budget Analyst: William Lokers Production Manager: Ruth B Philippou Senior Project Advisor: Mary P Maher Production Manager: Meredith A House Production Manager: Margaret Lee Hudson												
Proposal #:	no data												
Description:	<p>This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). For STARRS LS, we will attempt to reinterview all respondents from the All Army Study (AAS), New Soldier Study (NSS) and Pre-Post Deployment Study (PPDS) samples using a web-phone multi mode study. Each of the approximately 70,000 eligible respondents will be invited to participate once every two years. In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS LS will continue to maintain and support the Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as de-identified historical administrative data received from the Army and Department of Defense (DoD). Additionally, STARRS LS will continue to receive and link de-identified administrative data to the survey data (from the original Army STARRS data collection as well as STARRS LS surveys). These data will also be made available in the Research Data Enclave.</p>												
SRO Project Period	02/2015 - 11/2019												
Data Col Period	10/2015 - 11/2019												
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%;"> <tr> <td>PreProduction Start: 02/01/2015</td> <td>Pretest Start: 10/14/2015</td> </tr> <tr> <td>Pretest End: 03/31/2016</td> <td>Recruitment Start:</td> </tr> <tr> <td>Staffing Completed:</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start:</td> <td>SS Train End:</td> </tr> <tr> <td>DC Start: 09/12/2016</td> <td>DC End: 09/30/2019</td> </tr> </table>			PreProduction Start: 02/01/2015	Pretest Start: 10/14/2015	Pretest End: 03/31/2016	Recruitment Start:	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start: 09/12/2016	DC End: 09/30/2019
PreProduction Start: 02/01/2015	Pretest Start: 10/14/2015												
Pretest End: 03/31/2016	Recruitment Start:												
Staffing Completed:	GIT Start:												
SS Train Start:	SS Train End:												
DC Start: 09/12/2016	DC End: 09/30/2019												
Other Project Team Members:	Andrew Hupp, Heather Schroeder, Leah Roberts, Ryan Yoder, Andrew Piskowrowski, Lisa Lewandowski-Romps, Lamont Manley, Emily Blaczyk, Genise Pattulo, Derek Dubuque, Keith Liebetreu												
Other Project Names:													
Sample Mgmt Sys	MSMS												
Data Col Tool	Blaise 5												
Hardware	Desktop												
DE Software	N/A												
QC Recording Tool	Live monitoring												
Incentive	Yes, R												
Administration	SRO Group												
Payment Type	Check, post (\$50-\$100); Cash, prepaid (\$2 (or Challenge coin)); Other (Army STARRS challenge coin (provide												
Payment Method	Check through other system (MSMS); Imprest Cash Fund from ISR Business Office (MSMS); Other (Army STA												

Report Period	Aug. 2017 (A-STARRS LS)	Project Phase	Implementing
Risk Level	Some Concerns		
Monthly Update	<p>Starting this month, we will include only the "BLUF" (Bottom Line Up Front) portion of the monthly report here. The full report is uploaded as a separate file for those needing additional detail.</p> <p>BLUF:</p> <p><input type="checkbox"/> Production data collection continues. We released sample replicates 22, 23 and 24 this month, bringing the total number of released sample lines to 40,720.</p>		

- A total of 10,285 main Wave 1 interviews and 217 Phase 5 (end game) interviews have been completed as of August 31. 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 received USUHS IRB approval for modification #11 (final contact protocol and end game updates).
- Dr. Wagner presented an update on survey data collection at the August 18 Government Steering Committee meeting.
- We received PI approval for funding to add the STARRS-LS survey data to the ICPSR holdings, and are preparing a formal budget and scope memo for this work.
- We have begun working on plans for Wave 2 data collection. We will be updating the instrument to use the latest version of the Blaise software for Wave 2.
- We are working on design options and cost estimates for a new study that will refresh the STARRS sample by recruiting and interviewing new Soldiers coming into the Army.
- Enclave user support continues. We are working on setting up a replacement server, which we expect to begin using in September.

Special Issues**Areas of Risk, Mitigation Strategies:**

We continue to track areas of risk, and develop mitigation strategies.

- Respondent contact and participation.
 - o We continue to wait for the Army to determine if they can provide any additional address information for the STARRS-LS sample.
- New technical systems.
 - o Our technical systems are performing well overall, although we continue to experience issues that require careful monitoring.
 - o We plan to upgrade our instrument to the newest version of the Blaise data collection software for Wave 2. This will add to our Wave 2 pre-production costs, but it is important to keep up with software improvements.
- Addition of public use datasets.
 - o We are waiting for Army and PI decisions on which Army STARRS datasets will be made available to the wider research community. Once the decisions are made, we will need to evaluate the impact this will have on our staffing and costs, and will prepare budgets and timelines for these activities.

**Cost
Aug 17, 2017**

Total Cost to Date (Direct + Indirect):	5,793,112.00
Estimated Cost at Completion (E\$AC):	12,563,500.00
Total Budget:	12,738,233.00
Variance (Budget minus E\$AC):	174,733.00

Reason For Variance:

We continue to adjust our costs each month, to reflect staffing and non-salary changes. This variance is less than 1.5% 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
Aug 17, 2017**

Dollars Projected For Month:	332,235.00
Actual Dollars Used:	264,076.00
Variance (Projected minus Actual):	68,160.00

Reason For Variance:

The under-run is primarily due to fewer hours worked than projected. we trained 7 new interviewers to address the SSL shortage, and are awaiting additional data manager resources which we hope will become available in October.

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 CogEcon 2016 Web (CogEcon Web)

Project Mode Primary: Web Total of Modes: 1

Project Type Sponsored Projects **Project Status** Current

Budget **Direct Budget:** 78,347.00 **Indirect Budget:** 28,205.00 **Total Budget:** 106,552.00

Principal Investigator/Client Matthew Shapiro (SRC)
Brooke Helppie-McFall (SRC)

Funding Agency

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

Project Team **Project Lead:** Esther H Ullman
Budget Analyst:
Production Manager:
Senior Project Advisor: Kirsten Haakan Alcser
Production Manager:
Production Manager:

Proposal #: no data

Description: Invite 600 past CogEcon respondents who have indicated internet access to complete a 15 minute on-line instrument. Participating Respondents will be asked to sign up for financial management tools and link their own accounts in return for token of appreciation. Instrument and sample management will be in Illume. There will be mail and email reminders. Survey will be fielded Oct-Dec 2017.

SRO Project Period 07/2017 - 01/2018

Data Col Period 10/2017 - 01/2018

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: Hueichun Peng will program Illume sample management and complex Illume sections. Donnalee Gray will help with Illume programming for the VRI section, other programming will be completed by project staff. Suzanne Hodge will be SSA and Minako Edgar is Data Ops manager

Other Project Names: CogEcon 2017 Web

Sample Mgmt Sys Illume

Data Col Tool Illume

Hardware NA

DE Software Illume

QC Recording Tool N/A

Incentive Yes, R

Administration SRO Group

Payment Type Check, post (variable)

Payment Method Check through other system (Illume)

Report Period Aug, 2017 (CogEcon Web) **Project Phase** Initiation

Risk Level Not Rated

Monthly Update Activities for start up of CogEcon Web Sruvey are underway. The client requested additional programming assistance from SRO and this has delayed start of testing and introduced additional costs. SRO did a re-budget with client and was conservative in estimating these costs

Special Issues SRO programming costs may exceed budgeted amount due to complexity of instrument.

Cost
Aug 31, 2017

Total Cost to Date (Direct + Indirect): 3,932.80
Estimated Cost at Completion (E\$AC): 105,960.09
Total Budget: 106,552.00
Variance (Budget minus E\$AC): 592.91
Reason For Variance:

Projections
Aug 31, 2017

Dollars Projected For Month: 6,780.06
Actual Dollars Used: 3,740.50
Variance (Projected minus Actual): 3,039.56
Reason For Variance: some delay in programming so some key staff not yet charging (for activities like testing)

Measures

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

Other Measures

Project Name	Detroit Metropolitan Area Survey (DMACS)																								
Project Mode	Primary: Mixed																								
Project Type	Sponsored Projects		Project Status	Current																					
Budget	Direct Budget:	233,426.00	Indirect Budget:	23,343.00	Total Budget: 256,769.00																				
Principal Investigator/Client	Jeff Morenoff (Population Studies) Elisabeth Gerber																								
Funding Agency	Kresge Foundation																								
IRB	HUM#:	00112364	Period Of Approval:	2/25/2017																					
Project Team	Project Lead:	Joseph Matthew Matuzak																							
	Budget Analyst:	Dean E Stevens																							
	Production Manager:	Bridgitte Wyche McGee																							
	Senior Project Advisor:	Kirsten Haakan Alcser																							
	Production Manager:	Joseph Matthew Matuzak																							
	Production Manager:	Bridgitte Wyche McGee																							
Proposal #:	no data																								
Description:	<p>The Detroit Metropolitan Area Communities Study (DMACS) seeks to provide an information and innovation platform for conducting research and supporting evidence-based decisions about community investments and public policy. DMACS will be built around a representative web-based panel survey of adult residents of the four-county Metro Detroit region of Southeast Michigan, including Macomb, Oakland, Washtenaw and Wayne Counties, and the City of Detroit. Panel members are to be drawn from diverse communities and will reflect the region's full range of population characteristics, including respondents from traditionally underserved and/or underrepresented groups such as: people with low incomes, education or literacy; those with physical or cognitive disabilities; recent migrants; the elderly; and young adults. When fully implemented, the survey sample will include approximately 2,000 adult residents, selected and recruited based on best scientific practices (ie a probability sample), including representative subsamples of approximately 1,000 Detroit residents and 1,000 adults living throughout the metropolitan area. It is envisioned that panel members will complete a 15-20 minute web-based survey each quarter (i.e., four per year) plus additional short surveys as situations and opportunities arise. The core content on the quarterly DMACS surveys will include questions that ask citizens to prioritize the needs of their community and aspects they would most like to see change (e.g., with regard to crime, business development, jobs, education, housing, transportation, health care, and the environment). It will also monitor trends in citizens' views of changes to their community and the wider region, which groups are benefitting (or being hurt) the most from those changes, views on inequality and its sources and consequences, and the degree of civic engagement in local communities. This core content will provide a clear, nuanced and unprecedented portrait of the people and communities that make up our changing region.</p> <p>DMACS will also provide the infrastructure to allow shorter surveys on specific questions as they arise, as well as to investigate in greater depth specific issues that affect a particular neighborhood, municipality or portion of the region. In the case of short topical surveys, the web-based survey platform, coupled with a pre-existing panel of survey respondents, means that the study team can put surveys in the field almost immediately, without each time incurring the financial and time-related costs of recruiting and training a whole new sample, training interviewers, and collecting background information on respondents; this work is completed when the panel is initiated. In the case of community deep-dives, we can recruit an "oversample" of participants from a specific geographic area into the panel and use the web platform to administer specialized questionnaires. DMACS also plans to identify audio-visual materials, such as maps, video clips and other items, to gather information. In all cases, DMACS' design will allow the study team to merge detailed information about the survey respondent's local social, economic, physical and political context.</p>																								
SRO Project Period	04/2016 - 02/2017																								
Data Col Period	07/2016 - 03/2017																								
Security Plan	NA																								
Milestone Dates	<table><tr><td>PreProduction Start:</td><td>04/01/2016</td><td>Pretest Start:</td><td></td></tr><tr><td>Pretest End:</td><td></td><td>Recruitment Start:</td><td>07/01/2016</td></tr><tr><td>Staffing Completed:</td><td></td><td>GIT Start:</td><td></td></tr><tr><td>SS Train Start:</td><td>10/17/2016</td><td>SS Train End:</td><td></td></tr><tr><td>DC Start:</td><td>10/03/2016</td><td>DC End:</td><td>07/31/2017</td></tr></table>					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
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 Aug, 2017 (DMACS) **Project Phase** Closing

Risk Level Some Concerns

Monthly Update Data collection and delivery is complete on DMACS. Final reports are in process.

Special Issues**Cost** *Total Cost to Date (Direct + Indirect):* 288,647.90**Aug 01, 2017** *Estimated Cost at Completion (E\$AC):* 274,431.71*Total Budget:* 256,769.00*Variance (Budget minus E\$AC):* -17,662.71**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.

Projections**Aug 01, 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
<i>Current Goal:</i>	712		1.0
<i>Goal at Completion:</i>	712		1.0
<i>Current actual:</i>	714		
<i>Estimate at Complete:</i>	714		
<i>Variance:</i>	2		

Other Measures

Wave 2 goal: 460 completes. Currently: 439 completes.

Project Name	Empirical Assessment of Respondent Driven Sampling (EARDS)												
Project Mode	Primary: Face to Face Total of Modes: 1												
Project Type	Sponsored Projects	Project Status	Current										
Budget	Direct Budget: 151,337.00	Indirect Budget: 83,234.00	Total Budget: 234,871.00										
Principal Investigator/Client	Sunghee Lee (ISR)												
Funding Agency													
IRB	HUM#:	Period Of Approval:											
Project Team	Project Lead:	Sara D Freeland											
	Budget Analyst:	Dean E Stevens											
	Production Manager:	Sara D Freeland											
	Senior Project Advisor:	Kirsten Haakan Alcser											
	Production Manager:	James Koopman											
	Production Manager:												
Proposal #:	no data												
Description:	This project has been funded to assess the feasibility of a Respondent Driven Sampling plan involving Korean Americans and Intravenous Drug Users (IDU). The effort focusing on Korean Americans is being done in Los Angeles and overseen by the PI and her staff. SRO's involvement centers on the IDU sample, which will take place in the Great Detroit area. The IDU sample portion of the project is expected to start in the fall of 2016, beginning with focus groups. This part of the project will also include staffing field interviewers to manage in person ACASI survey data collection at 3 different sites in the Greater Detroit area.												
SRO Project Period	10/2016 - 10/2017												
Data Col Period	05/2017 - 08/2017												
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%;"> <tr> <td>PreProduction Start: 01/16/2017</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start: 02/15/2017</td> </tr> <tr> <td>Staffing Completed: 04/21/2017</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start:</td> <td>SS Train End:</td> </tr> <tr> <td>DC Start: 05/01/2017</td> <td>DC End: 10/30/2017</td> </tr> </table>			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
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	Aug, 2017 (EARDS)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	<p>We've received extra funding to continue data collection for up to two more months. This has meant that instead of wrapping up in August we will continue into October.</p> <p>We've decided to drop the Macomb data collection site.</p>		
Special Issues	<p>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.</p> <p>- Fixed now.</p>		

Cost
Aug 09, 2017

Total Cost to Date (Direct + Indirect): 188,384.26
Estimated Cost at Completion (E\$AC): 234,571.00
Total Budget: 234,871.00
Variance (Budget minus E\$AC): 46,186.74
Reason For Variance: With 2 months of data collection we're right on target. We are currently evaluating the budget and working with the PI to determine exactly how and when we'll conclude data collection on target for the budget.

Projections
Aug 09, 2017

Dollars Projected For Month: 16,634.28
Actual Dollars Used: 16,007.09
Variance (Projected minus Actual): 627.19
Reason For Variance: We're very close to where we expected to be. We originally anticipated more interviews at this point, which would mean a smaller variance.

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:	400		
Current actual:	235		
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:	<p>This project will involve the completion of a face-to-face CAPI interview, designed to provide a dementia assessment of HRS respondents. A sample of 5000 respondents (one per household) who are 65 years of age or older will be selected for this effort. The questionnaire will be administered to respondents after the HRS 2016 interview has been completed. The sample will not be clustered geographically; it will be selected randomly. It is expected that the field team will carry out well-planned regional trips in order to complete the 3000 in-person interviews. An informant interview will also be completed for each of the respondents interviewed.</p> <p>The respondent questionnaire length is expected to be 60 minutes. The informant questionnaire is expected to be 20 minutes and can be administered by telephone when the interviewer calls to set up an appointment with the respondent for the face-to-face interview.</p>													
SRO Project Period	01/2015 - 12/2017													
Data Col Period	05/2016 - 02/2017													
Security Plan	NA													
Milestone Dates	<table border="1" style="width: 100%;"> <tr> <td>PreProduction Start:</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start:</td> </tr> <tr> <td>Staffing Completed:</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start:</td> <td>SS Train End:</td> </tr> <tr> <td>DC Start:</td> <td>DC End:</td> </tr> </table>				PreProduction Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
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	Aug, 2017 (HCAP 2016)	Project Phase	Implementing
Risk Level	Some Concerns		
Monthly Update	As of August 27th, there are 3,312 completed respondent interviews and another 3,120 informant interviews.		
	Current Response/Completion Rates		

Sample	Response Rate	Completion Rate
Priority Sample	61%	92%
Total Sample (all)	74%	97%

101 new cases were released on August 22nd - of these, 46 were priority cases.

Special Issues

Cost

Jul 31, 2017

Total Cost to Date (Direct + Indirect): 4,464,866.88

Estimated Cost at Completion (E\$AC): 4,684,977.64

Total Budget: 4,476,719.00

Variance (Budget minus E\$AC): -208,255.64

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

Jul 31, 2017

Dollars Projected For Month: 133,132.95

Actual Dollars Used: 120,410.06

Variance (Projected minus Actual): 12,722.89

Reason For Variance:

Measures

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

Other Measures

Project Name	Health and Retirement Study (HRS 2016)																								
Project Mode	Primary: Mixed Total of Modes: 2																								
Project Type	Sponsored Projects		Project Status	Current																					
Budget	Direct Budget:	24,690,534.00	Indirect Budget:	8,888,593.00	Total Budget: 33,579,127.00																				
Principal Investigator/Client	David Weir (SRC) Mary Beth Ofstedal (SRC) Ken Langa (SRC)																								
Funding Agency	NIA																								
IRB	HUM#:	HUM00061128	Period Of Approval:	1/15/2015 - 1/14/201																					
Project Team	Project Lead:	Nicole G Kirgis																							
	Budget Analyst:	Richard Warren Krause																							
	Production Manager:	Stephanie Sullivan																							
	Senior Project Advisor:	Mary P Maher																							
	Production Manager:	Jennifer C Arrieta																							
	Production Manager:	Piotr Dworak																							
Proposal #:	no data																								
Description:	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort will be added. A series of physical measures and biomarkers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records and Veterans Administration (VA) records is requested.																								
SRO Project Period	04/2015 - 06/2017																								
Data Col Period	02/2016 - 04/2017																								
Security Plan	NA																								
Milestone Dates	<table><tr><td>PreProduction Start:</td><td>04/01/2015</td><td>Pretest Start:</td><td>10/16/2015</td></tr><tr><td>Pretest End:</td><td>11/07/2015</td><td>Recruitment Start:</td><td>06/01/2015</td></tr><tr><td>Staffing Completed:</td><td>03/15/2016</td><td>GIT Start:</td><td>02/10/2016</td></tr><tr><td>SS Train Start:</td><td>02/12/2016</td><td>SS Train End:</td><td>04/24/2016</td></tr><tr><td>DC Start:</td><td>02/22/2016</td><td>DC End:</td><td>04/29/2017</td></tr></table>					PreProduction Start:	04/01/2015	Pretest Start:	10/16/2015	Pretest End:	11/07/2015	Recruitment Start:	06/01/2015	Staffing Completed:	03/15/2016	GIT Start:	02/10/2016	SS Train Start:	02/12/2016	SS Train End:	04/24/2016	DC Start:	02/22/2016	DC End:	04/29/2017
PreProduction Start:	04/01/2015	Pretest Start:	10/16/2015																						
Pretest End:	11/07/2015	Recruitment Start:	06/01/2015																						
Staffing Completed:	03/15/2016	GIT Start:	02/10/2016																						
SS Train Start:	02/12/2016	SS Train End:	04/24/2016																						
DC Start:	02/22/2016	DC End:	04/29/2017																						
Other Project Team Members:	Rebecca Gatward (Survey Director), Sharon Parker (Production Management Coordinator), Frost Hubbard (New Cohort), Jennifer Kelley (Respondent Contact Coordinator), Jaime Koopman (Project Manager), Russ Stark (SSL Production Manager), Ian Ogden (Project Assistant), Dan Tomlin (Project Assistant), Lisa deRamos (Project Assistant), Daniah Buageila (Project Assistant)																								
Other Project Names:																									
Sample Mgmt Sys	SurveyTrak; MSMS																								
Data Col Tool	Blaise 4.8																								
Hardware	Laptop																								
DE Software	NA																								
QC Recording Tool	DRI-CXM																								
Incentive	Yes, R																								
Administration	SRO Group																								
Payment Type	Check, prepaid (80.00)																								
Payment Method	Check through STrak RPay System																								

Report Period	Aug, 2017 (HRS 2016)	Project Phase	Implementing
Risk Level	Some Concerns		
Monthly Update	During the month of August, data collection for the new cohort and panel components continued. Field panel work ended in mid-August and remaining viable non-final panel sample was transferred to the SSL for further telephone work in an effort to boost the panel response rate as high as possible. Field interviewers are now focused on new cohort, which includes screening and baseline interviewing with the goal of finishing data collection by mid-December. Additional strategies have been discussed and implemented in effort to boost production, as we are projected to have		

a significant shortage of baseline interviews based on the viability of the non-final LBB sample.

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

2018 Systems Development Milestones:

Web pilot – 'online' (MSMS + Blaise 5) – Launched 28 August (original target date - 24 July 2017)

First CAPI test – 'offline' – possibly September 2017 (this is later than expected, final date TBD) (local field interviewers)

Key decision point – September 2017 – systems and modes for 2018 (MSMS/B5/B4.8/ST)

Special Issues

Cost

Jul 31, 2017

Total Cost to Date (Direct + Indirect):	33,134,215.49
Estimated Cost at Completion (E\$AC):	38,648,089.86
Total Budget:	33,579,127.00
Variance (Budget minus E\$AC):	-5,068,962.86
Reason For Variance:	Projected cost to complete reflects extension of data collection through the end of 2017.

Projections

Jul 31, 2017

Dollars Projected For Month:	958,067.72
Actual Dollars Used:	949,582.53
Variance (Projected minus Actual):	8,485.19
Reason For Variance:	Overall, actual dollars for the month of July came in slightly under projections. On Panel, hours were 7% higher than projections, but actual salary cost was 16% lower. Non-salary on Panel came in 9% under due to respondent payment and travel coming in under projections. On New Cohort, hours and salary cost were about 10% higher than projections, mostly due to interviewer hours. Non-salary was over by 13% due to travel.

Measures

	Units Complete	RR	HPI
Current Goal:	23,569	85%	7.45
Goal at Completion:	23,569	85	7.45
Current actual:	20,745	72%	8.7
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	Aug, 2017 (HCDC, H&C)	Project Phase	Implementing
Risk Level	<i>Some Concerns</i>		
Monthly Update	<p>During August 2017, SRO activities included the following:</p> <p>Task 1: Management, Budget and Work Plan</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> Held regular meetings with the research team to discuss design, deliverables, schedule, funding, production issues, including responding to PI requests for item-level analyses. Invoicing 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. Prepared weekly production reports. Modified production monitoring dashboards. Began creating formal Pilot report. Prepared and submitted UM IRB amendment to include collection of email addresses, cell phone numbers and permission to text, change in diary collection from four days to two. Prepared comparative cost estimates for daily diary data entry Received, disbursed and reconciled imprest cash used for token gift in Q2 prenotification letters. Reviewed SAQ data entry, and provided feedback to data entry team. Prepared and loaded email sample for Quarter 2; sent Cleveland Quarter 2 email. Responded to email inquiries from respondents. Cleaned and delivered batch-tracked addresses to data manager. Finalized Respondent profiles specifications (family information about respondent such as number of children, dates of birth of children). Worked with vendor to specify and prepare kits for Quarter 2 interviewing. Prepared responses to PI questions about laser tape measurement data Prepared responses to PI questions about data deliverables. <p>.</p> <p>Task 2: Sampling</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> Monitored production progress versus sampling assumptions. Selected population sample for Q2. Cleaned Cleveland Q2 Voucher sample Conducted batch searches for new phone numbers/addresses Created and executed new scripts for cleaning Cleveland sample to accommodate changed format, prepared files for loading into sample management system. Analyzed production data to estimate impacts of cost-cutting measures Began preparation of presentation for research team. <p>Task 3: Questionnaire Development</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> Updated specification for pulling completion variables/indicators from Blaise into SurveyTrak Updated programming to differentiate blood spot refusals from ineligible. Added soft check to prevent future years entry for PHC2a and PDE3. Added interviewer instructions for switching between administration languages. Reinstated the SSN collection question for the PCG, updated interviewer instructions. Added scripted introductions for the Child survey. Added reminder to interviewer to only administer the Household SAQ one time per family. 		

- Updated specifications for collection of email address, cell phone number (with permission to text).

Task 4: CAI Programming

% Task Spent to Date

- Removed Social Security Administration from PCG CAPI interview on 7/3/2017, programmed and tested for re-insertion on 8/1/2017
- Added scripted introductions for the Child survey.
- Added reminder to interviewer to only administer the Household SAQ one time per family.
- Updated programming to differentiate blood spot refusals from ineligible.
- Added soft check to prevent future years entry for PHC2a and PDE3.
- Updated programming for data entry of Household SAQs and Child SAQ.
- Investigated display issue in screener that prevented Quality Control team from viewing full question text.
- Extended recording capture list for PCG and Child instruments.
- Programmed post-interview observation on screener to capture language of interview, and problem encounter details.

Task 5: Systems Programming

% Task Spent to date

- SurveyTrak Programming
 - o Programmed and tested list of Respondent letters and letter requests.
 - o Updated interviewer safety observations
 - o Updated search fields in Webtrak to include respondent email address
- Web Log
 - o Added enhanced search fields (for various documents)
 - o Fixed minor bugs

Tasks 6, 7: Interviewer Recruitment & Hiring, Training

% Task Spent to Date

- Posted open interviewer positions for on-staff interviewers
- Screened and reviewed on-staff interviewer applicants
- Gathered initial cost estimates for a Fall 2017 attrition training

Task 8: Main Data Collection

% Task Spent to Date

- Reviewed/monitored performance of interviewers. Created performance improvement plans where necessary.
- 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. Reconciled incorrectly labeled or missing items.
- Reviewed all consent documents and respondent payment receipts.
- o
 - Cumulative production as of 7/30/2017:
 - o Completed
 - ☐ 582 Screener interviews (with eligible respondents), identified 1236 ineligible households, 542 non-sample addresses, 100 refusals
 - ☐ 330 PCG interviews
 - ☐ 405 Child interviews
 - Ran quality-checking reports on physical measures and biomarkers.
 - Worked with vendor to specify materials for Quarter 2 mailing. Provided updated forms as necessary.

Task 9: Post Collection Processing

% Task Spent to Date

- Edited first 50 cases of SAQ data entry.

Task 10: Weighting

% Task Spent to Date

- N/A

Task 11: Final Data Deliverables

% Task Spent to Date

- Reviewed data deliverables. Updated specification for deliverables as necessary to properly handle PII variables.
- Delivered data.

Special Issues**Areas of Concern:**

- Hours per screener for the Voucher Sample are running significantly higher than budgeted due to sample quality issues. This is particularly true in Cleveland, where the sample addresses are much older. This will negatively impact our ability to meet our interview goals as we won't have sufficient interviewer hours to do the work. 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, with an average population interview length of 94.9 minutes (26.4 minutes over budgeted length) and an average voucher interview length of 108.3 minutes (29.8 minutes over the budgeted length). This includes adding about 8 minutes to the consenting and receipt management, and another 5-8 minutes primarily for revised social security forms. Early indicators are that this is contributing to interviewers having to make multiple visits to households to complete even just PCG interviews, but especially for PCG and child interviews.
- 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.
- Worked with ICPSR to prepare scope and budget for production of public use datasets.
- At the request of the research team, SRC developed a locating program and recruited locating staff due to expectations that a much higher proportion of phone numbers for the Voucher sample will be unusable.
- Reprinted the Social Security booklets to eliminate the earnings and benefits pages. Reprinted all existing PCG and Child bags, and shipped new supplies to interviewers. Altered programming to eliminate the Social Security consent administration, and then reinstate administration for one page only.

Cost
Sep 30, 2017

Total Cost to Date (Direct + Indirect):	3,438,946.40
Estimated Cost at Completion (E\$AC):	10,877,818.00
Total Budget:	10,743,019.00
Variance (Budget minus E\$AC):	-134,799.00

Reason For Variance:

Programming scope between the Pilot and Main was much higher than anticipated. Sample preparation tasks for the voucher sample are much more complex than anticipated due to inconsistent formats received from site to site and quarter to quarter. Data management costs are much higher than anticipated. Screening for voucher sample is running much higher than anticipated due to the poor quality of the sample.

Projections
Sep 30, 2017

Dollars Projected For Month:	522,514.00
Actual Dollars Used:	425,139.00
Variance (Projected minus Actual):	97,374.00

Reason For Variance:

Hosting was far less than projected. Respondent payments are much lower than projected due to lower production for Voucher sample.

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

Other Measures

Project Name 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 - 4/12/2018

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
CAMS

Other Project Names:

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 Aug, 2017 (CAMS 2017) **Project Phase** Planning

Risk Level Not Rated

Monthly Update CAMS pre-production continues through August. Materials were prepared and submitted to IRB and are currently under review. In the last few weeks of August focus has shifted to sample preparation and ordering of mailing materials as we wait for the IRB review to complete. The first mailing will be in on 9/20, so we are preparing systems and resources as we get closer.

Special Issues With the delivery of the sample and IRB review underway, there are no special issues to report.

Cost
Jul 31, 2017

Total Cost to Date (Direct + Indirect): 1,445.21
Estimated Cost at Completion (E\$AC): 394,656.79
Total Budget: 397,683.00
Variance (Budget minus E\$AC): 3,026.21
Reason For Variance: Adjustments to projections based on staff assigned and work in July.

Projections
Jul 31, 2017

Dollars Projected For Month: 7,677.81
Actual Dollars Used: 3,661.08
Variance (Projected minus Actual): 4,016.73
Reason For Variance: Work in July was not as extensive as initially projected. Projections have been pushed forward.

Measures

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

Other Measures

Project Name	Life History Mail Survey (HRS LHMS 2017)					
Project Mode	Primary: Mail Total of Modes: 1					
Project Type	Sponsored Projects		Project Status	Current		
Budget	Direct Budget:	338,063.61	Indirect Budget:	185,933.94 Total Budget: 523,997.55		
Principal Investigator/Client	Mary Beth Ofstedal (ISR) Jacqui Smith (ISR) David Weir (ISR)					
Funding Agency						
IRB	HUM#:	Period Of Approval:				
Project Team	Project Lead:	James Koopman				
	Budget Analyst:	Janelle P Cramer				
	Production Manager:	James Koopman				
	Senior Project Advisor:	Evanthia Leissou				
	Production Manager:					
	Production Manager:					
Proposal #:	no data					
Description:	<p>LHMS is a principal investigator (Jacqui Smith) led research which started in 2015. The research was conducted within the context of the Health and Retirement Study off-year surveys. In 2015, HRS respondents were invited to participate in LHMS survey which included life history questions. The LHMS 2017 study will mail self-administered questionnaires to approximately 5,000 HRS respondents. The response rate expected is 70%, estimating 3,500 questionnaires will be returned.</p> <p>The HRS will continue this effort during its 'off year' from main data collection, and the goal is to have every HRS respondent complete this questionnaire. SRO's goal is to create a stable and successful platform for the continuation of this effort.</p> <p>All contact attempts with the respondents will be via US Mail and there is no pretest for this survey. There are two parts to the questionnaire. The first part is a life history calendar and the second is a traditional questionnaire asking about the respondent's life before the age of 50. These questions are mainly focused on housing, school and work history.</p> <p>An initial mailing of the questionnaire will be done in late April. The mailing will include a check for \$25 as token of appreciation. There will be 3 follow up mailings:</p> <ul style="list-style-type: none"> • Four weeks after the original questionnaire mailing, a second questionnaire will be sent to persons who have not returned the original mail survey. • Approximately six weeks after the original questionnaire mailing, a thank you postcard will be sent to those respondents who have returned a completed questionnaire and a reminder postcard will be sent to those respondents who have not responded either by returning a completed questionnaire or by refusing to participate. The reminder postcard will include both a thank you to those who have already responded, and a reminder to those who have not yet done so. 					
SRO Project Period	01/2017 - 06/2017					
Data Col Period	04/2017 - 06/2017					
Security Plan	NA					
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="width: 50%; text-align: center; vertical-align: top;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>				PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:					
Other Project Team Members:	James Koopman, Eva Leissou and Ann Vernier					

Other Project**Names:**

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

Report Period Aug, 2017 (HRS LHMS 2017) **Project Phase** Implementing

Risk Level On Track

Monthly Update We are wrapping up data collection and have had a very good response. We've exceeded our response rate expectations and continue to receive a handful of surveys every week. I expect to end the project with a 73% response rate, which is 3% higher than our goal at the start of production.

SAQ	Complete	Refused	Deceased	
3652	207	55		total sample: 5174

We have received good data back from CASO and we expect biweekly data deliveries until the end of production.

Schedule:

English Spanish

05/24/2017	06/21/2017	Invitation letters
06/21/2017	07/12/2017	First Reminder letters
07/12/2017	08/03/2017	Thank you/Reminder Postcards
08/03/2017	08/31/2017	Final Reminder letter

Special Issues

Cost

Aug 31, 2017	Total Cost to Date (Direct + Indirect):	242,737.37
	Estimated Cost at Completion (E\$AC):	523,997.00
	Total Budget:	523,997.55
	Variance (Budget minus E\$AC):	281,259.63

Reason For Variance: We have a few outstanding CASO charges that haven't hit the account. After looking at salary needed for SRO logging staff and the amount of time the project manager spends on the project we think we'll be right on target.

Projections

Aug 31, 2017	Dollars Projected For Month:	71,330.95
	Actual Dollars Used:	36,359.37
	Variance (Projected minus Actual):	34,971.58

Reason For Variance: We're a little of schedule for when we expected CASO charges to come in and hit the account. There were two mailings that will be reflected in next months cost report.

Measures

	Units Complete	RR	HPI
Current Goal:	3500	70	
Goal at Completion:	3500	70	
Current actual:	3652	71	
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:	<p>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.</p>				
SRO Project Period	09/2014 - 06/2016				
Data Col Period	01/2015 - 12/2015				
Security Plan	NA				
Milestone Dates	<table border="1" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> PreProduction Start: 10/01/2014 Pretest End: Staffing Completed: SS Train Start: DC Start: 03/02/2015 </td> <td style="width: 50%; vertical-align: top;"> Pretest Start: Recruitment Start: 01/26/2015 GIT Start: SS Train End: DC End: 05/31/2016 </td> </tr> </table>			PreProduction Start: 10/01/2014 Pretest End: Staffing Completed: SS Train Start: DC Start: 03/02/2015	Pretest Start: Recruitment Start: 01/26/2015 GIT Start: SS Train End: DC End: 05/31/2016
PreProduction Start: 10/01/2014 Pretest End: Staffing Completed: SS Train Start: DC Start: 03/02/2015	Pretest Start: Recruitment Start: 01/26/2015 GIT Start: SS Train End: DC End: 05/31/2016				
Other Project Team Members:	Barb Ward - Lead Russ Stark - Production Lead Judi Clemens, Donnalee Grey-Farquharson - District IRB Dan Zahs, Paul Burton - Sampling Hueichun Peng - Technical Lead, SRIS Jim Hagerman - Blaise Shaowei Sun- SRIS Laura Yoder - Data Mgt				

Other Project**Names:**

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

Report Period	Aug, 2017 (MTTS)	Project Phase	Closing																								
Risk Level	On Track																										
Monthly Update	1) reviewed cost reports & budgets 2) worked on sample deliverables for the MKT sample. Participated in meetings with the research team.																										
Special Issues																											
Cost																											
Sep 30, 2017	Total Cost to Date (Direct + Indirect):	975,509.38																									
	Estimated Cost at Completion (E\$AC):	988,456.16																									
	Total Budget:	1,019,417.00																									
	Variance (Budget minus E\$AC):	30,960.84																									
	Reason For Variance:	Work scope reductions have led to a substantial underrun. We are working with EWB to utilize some of the underrun, with the permission of the research team.																									
Projections																											
Sep 30, 2017	Dollars Projected For Month:	6,754.95																									
	Actual Dollars Used:	2,779.21																									
	Variance (Projected minus Actual):	3,975.74																									
	Reason For Variance:	The research team is still continuing to recruit teachers for video collection. This has led to a delay in SRC's work to complete sample weights.																									
Measures	<table><tr><td></td><td>Units Complete</td><td>RR</td><td>HPI</td></tr><tr><td>Current Goal:</td><td></td><td></td><td></td></tr><tr><td>Goal at Completion:</td><td></td><td></td><td></td></tr><tr><td>Current actual:</td><td></td><td></td><td></td></tr><tr><td>Estimate at Complete:</td><td></td><td></td><td></td></tr><tr><td>Variance:</td><td></td><td></td><td></td></tr></table>				Units Complete	RR	HPI	Current Goal:				Goal at Completion:				Current actual:				Estimate at Complete:				Variance:			
	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:	<p>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.</p> <p>For this round of data collection we have 2 conditions:</p> <p>1. Paper - URL with credential provided if not complete after 1 month, or URL provided if requested</p> <p>2. Web - Paper provided if requested or if not complete after 1 month</p> <p>Note - Both conditions are eventually given each option if not completed</p>														
SRO Project Period	05/2017 - 12/2017														
Data Col Period	05/2017 - 09/2017														
Security Plan	NA														
Milestone Dates	<table><tr><td>PreProduction Start:</td><td>Pretest Start:</td></tr><tr><td>Pretest End:</td><td>Recruitment Start:</td></tr><tr><td>Staffing Completed:</td><td>GIT Start:</td></tr><tr><td>SS Train Start:</td><td>SS Train End:</td></tr><tr><td>DC Start:</td><td>DC End:</td></tr></table>					PreProduction Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
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	Aug, 2017 (MTF Illume Web 2017)	Project Phase	Implementing
Risk Level	Not Rated		
Monthly Update	Non-response calling continues.		
	18% Web completes		
	17% SAQ received		
Special Issues			

Cost Jul 31, 2017	Total Cost to Date (Direct + Indirect):	63,886.70
	Estimated Cost at Completion (E\$AC):	147,015.33
	Total Budget:	163,886.06
	Variance (Budget minus E\$AC):	16,870.67
	Reason For Variance:	

Projections Jul 31, 2017	Dollars Projected For Month:	35,091.53
	Actual Dollars Used:	27,656.51
	Variance (Projected minus Actual):	7,435.02
	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	<table border="1" style="width: 100%;"> <tr> <td>PreProduction Start: 02/16/2017</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start:</td> </tr> <tr> <td>Staffing Completed:</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start: 03/30/2017</td> <td>SS Train End: 04/06/2017</td> </tr> <tr> <td>DC Start: 04/04/2017</td> <td>DC End: 05/23/2017</td> </tr> </table>			PreProduction Start: 02/16/2017	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Completed:	GIT Start:	SS Train Start: 03/30/2017	SS Train End: 04/06/2017	DC Start: 04/04/2017	DC End: 05/23/2017
PreProduction Start: 02/16/2017	Pretest Start:												
Pretest End:	Recruitment Start:												
Staffing Completed:	GIT Start:												
SS Train Start: 03/30/2017	SS Train End: 04/06/2017												
DC Start: 04/04/2017	DC End: 05/23/2017												
Other Project Team Members:	David Bolt (Technical Systems/Help desk), Lawrence Daher (Technical Systems/Help desk), Minako Edgar (Data Manager), Kyle Kwaiser (Technical Systems Lead/Data Manager), Paul Schulz (Survey Programmer), Marsha Skoman (App programmer), Pam Swanson (Survey Programmer), Daric Thorne (SSA). Note: Mike Nugent (SSL) is the field researcher for fall 2015. 2016-2017, MTF field staff will serve as FRs.												
Other Project Names:	MTF Fall 2015 Tablet Pilot MTF Spring 2016 Tablet Pilot MTF Spring 2017 Tablet Pilot												
Sample Mgmt Sys	SurveyTrak												
Data Col Tool	Other (SurveyCTO; custom)												
Hardware	Laptop; Tablet												
DE Software	Other (Google Form)												
QC Recording Tool	N/A												
Incentive	Yes, R; Yes, Other (Schools)												
Administration	SRO Group												
Payment Type	Check, prepaid (\$1,000 (fall 2015 schools only)); Check, post (\$500 or \$1000 (2016-2017 schools)); Cash, post												
Payment Method	Check through other system (Rpay spreadsheet); Imprest Cash Fund from ISR Business Office (Rpay spreadsh												

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

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

Monthly Update	In August:
-----------------------	------------

SRO delivered the smoothed budget for the next five years of data collection to MTF on August 22. The PIs are meeting on 9/12. Until we receive formal word on this 5-year budget, we are tentatively and unofficially moving forward with work that must be started now for 2018. This includes:

-Spec'ing, meeting and initial development work on changes to the Launch Survey App (SLApp), a new "Survey Manager" app for the tablets (for the FRs), and an Inventory and Logistics application.

-Lloyd, Barb, Kyle and Meredith held an initial meeting with Ginny and Alisa from MTF.

-Meredith and Lloyd have started conferring and collaborating.

-Space in G148 (to be shared with 4 DCO laptop cabinets) was negotiated and secured.

Spring 2017 data delivery still needs to be wrapped up - in September.

Special Issues

Cost

Aug 31, 2017

Total Cost to Date (Direct + Indirect): 1,021,979.26
Estimated Cost at Completion (E\$AC): 1,037,496.91
Total Budget: 780,547.00
Variance (Budget minus E\$AC): -256,949.91
Reason For Variance:

THESE COST ARE FROM 7/2017:

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 (\$64,724 of budget was added to the 2017 PG in July, so the overall overrun is now lower).

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: \$979,976.56
 Cost at completion: \$979,976.56
 Projections: \$0
 Variance: \$-264,153.56

PG starting 5/1/17:

Budget: \$64,724.00
 Total cost to date: \$42,002.70
 Cost at completion: \$57,520.35
 Projections: \$15,517.65
 Variance: \$7,203.65

Projections Aug 31, 2017

Dollars Projected For Month: 810.00
Actual Dollars Used: 850.19
Variance (Projected minus Actual): -40.19
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:	<p>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.</p>													
SRO Project Period	09/2010 - 07/2020													
Data Col Period	09/2011 - 06/2019													
Security Plan	Yes													
Milestone Dates	<table border="1" style="width: 100%;"> <tr> <td>PreProduction Start: 03/01/2011</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start: 06/01/2011</td> </tr> <tr> <td>Staffing Completed: 08/17/2011</td> <td>GIT Start: 09/13/2011</td> </tr> <tr> <td>SS Train Start: 09/15/2011</td> <td>SS Train End: 09/19/2011</td> </tr> <tr> <td>DC Start: 09/20/2011</td> <td>DC End: 09/07/2019</td> </tr> </table>				PreProduction Start: 03/01/2011	Pretest Start:	Pretest End:	Recruitment Start: 06/01/2011	Staffing Completed: 08/17/2011	GIT Start: 09/13/2011	SS Train Start: 09/15/2011	SS Train End: 09/19/2011	DC Start: 09/20/2011	DC End: 09/07/2019
PreProduction Start: 03/01/2011	Pretest Start:													
Pretest End:	Recruitment Start: 06/01/2011													
Staffing Completed: 08/17/2011	GIT Start: 09/13/2011													
SS Train Start: 09/15/2011	SS Train End: 09/19/2011													
DC Start: 09/20/2011	DC End: 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	Aug, 2017 (NSFG 2010-2020)	Project Phase	Implementing
----------------------	----------------------------	----------------------	--------------

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

Monthly Update	<p>We are now in Week 11 of Q24. The current focus is on completing main interviews. It is unlikely that we will reach the minimum goal of 1250 interviews for the current quarter. However, the goal of 5000 annual interviews is achievable, although it will be the lowest annual yield to date. Interviewers are traveling to a number of areas. One PSU was affected by Hurricane Harvey and was not workable for two weeks. 32 interviewers attended NSFG year 7 training during the last week of August. This included 23 new hires and 9 on-staffers. For the first time, interviewers completed digital fingerprinting while meeting with an external vendor during training. This new process was efficient and successful. NSFG training was conducted earlier than usual which will allow new interviewers to complete the address listing before the official start of the quarter and utilize the extra two weeks at the start of data collection.</p>
-----------------------	--

Hurricane Irma may impact production in 1-3 PSUs at the start of year 7. Year 7 is slated to begin on September 11 and end on December 16. Approximately 8 interviewers will continue year 6 data collection for an additional week, ending on September 17, 2017. A new staffing plan is in place for year 7: 27 areas are staffed with 1 interviewer and 13 areas are staffed with 2 interviewers (includes double workload PSUs). Discussions on interviewer bonuses and a mid-study attrition training will take place in the month ahead.

Special Issues

UM received the year 7 funding from NCHS in August 2017. The funding includes the \$5,000,000 base funding as well as additional funding of \$870,559 for increased data collection costs. Additionally, a no cost time extension has been granted for the remaining funds of the methodological research account. This extension is through August 2018.

**Cost
Aug 07, 2017**

Total Cost to Date (Direct + Indirect): 30,981,810.00
Estimated Cost at Completion (E\$AC): 43,410,000.00
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
Aug 07, 2017**

Dollars Projected For Month: 594,135.30
Actual Dollars Used: 580,559.46
Variance (Projected minus Actual): 13,575.84
Reason For Variance: Fewer interviewer hours than projected, delay in travel expenses and respondent payments.

Measures

	Units Complete	RR	HPI
Current Goal:	1250	68%	10.0
Goal at Completion:	5000	79%	10.0
Current actual:	1189	58.3%	10.3
Estimate at Complete:	4972	61.8%	10.3
Variance:	28	18.2%	.3

Other Measures

The goals represent Q24 goals and actuals. We are now in Week 11 of Quarter 24. The HPI goal has changed to 10.0. The completion goals above are the annual goals. The current goal is for the current quarter.

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:	<p>During early adolescence systems in the brain that are characterized by heightened reactivity to motivational stimuli and rewards mature rapidly, while systems that enable more effective cognitive control and judgment mature more slowly. This "developmental maturity mismatch" has been proposed as a key contributor to health risk behavior among adolescents, which is of critical importance because: (1) risk behaviors are the leading cause of morbidity and mortality in this age group, including diseases arising from unprotected sexual activity and casualties arising from reckless behavior (including driving fatalities and serious injuries); (2) it is the peak age for the onset of a wide range of risk behavior patterns with potential long-term consequences, including substance use and abuse, and delinquency. The "developmental maturity mismatch" hypothesis, however, has not been directly tested in relation to risk behavior at a level sufficient to inform this critical health area. The primary aim of the ANDH study is to understand the behavioral, cognitive, and neural bases of risk taking, through integrated analyses of age differences, developmental trajectories, and individual differences in psychosocial, neurocognitive and neural imaging assessments.</p> <p>The study will involve data collection from 10th and 12th grade students (~2000 students total) in 7-8 local high schools (approximately 150 students from each age group per school), with group administration in the schools using laptops in a baseline data collection to be completed over a 3-month period in the fall of 2014. Each respondent will attend 2 ~45 minute sessions: one survey and one neurocognitive tests. After the baseline data collection, SRO will modify the survey questionnaire to operate as a web-based survey, and will administer the web survey to all 2,000 respondents in years 2, 3, and 4 of the project (in the fall of 2015, 2016 and 2017). A small number of respondents (150-160) will be sub-selected to undergo neural imaging at U-M facilities in Ann Arbor (SRO will not be directly involved in this portion of the study).</p>												
SRO Project Period	04/2014 - 03/2018												
Data Col Period	03/2015 - 01/2016												
Security Plan	Yes												
Milestone Dates	<table border="1" style="width: 100%;"> <tr> <td>PreProduction Start:</td> <td>Pretest Start: 12/21/2016</td> </tr> <tr> <td>Pretest End: 01/03/2017</td> <td>Recruitment Start:</td> </tr> <tr> <td>Staffing Completed:</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start:</td> <td>SS Train End:</td> </tr> <tr> <td>DC Start: 09/01/2016</td> <td>DC End: 05/31/2018</td> </tr> </table>			PreProduction Start:	Pretest Start: 12/21/2016	Pretest End: 01/03/2017	Recruitment Start:	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start: 09/01/2016	DC End: 05/31/2018
PreProduction Start:	Pretest Start: 12/21/2016												
Pretest End: 01/03/2017	Recruitment Start:												
Staffing Completed:	GIT Start:												
SS Train Start:	SS Train End:												
DC Start: 09/01/2016	DC End: 05/31/2018												
Other Project Team Members:	<p>Wave 2 Team: Kyle Kwaiser (tech lead, data manager), Kathy LaDronka, Becky Loomis, Dolorence Okullo (data management), Hueichun Peng, Shaowei Sun</p> <p>Wave 1 Team: Larry Daher, Emmanuel Ellis, David Bolt, Kyle Goodman, Donnalee Grey-Farquharson, Kyle Kwaiser (tech lead, data manager), Becky Loomis, Max Malhotra, Shaowei Sun, Laura Yoder (data management)</p>												

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

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

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

Monthly Update

In August the AHRB project started winding down data collection for Wave 2. We phoned the few remaining R2/R3 respondents where at least 2 contact attempts had not been made. As expected, these last few weeks of Respondent calling did not yield huge gains in complete responses, but the phoning phase of the project has managed to recruit approx. 50 students for whom we did not have an address or working email address.

An IRB amendment was approved (expedited review) for a PI initiated final email to all W2 respondents. As with other reminder emails, this final reminder email will be sent in mid-September to those who R's have not started any part of the AHRB Study or have not completed both parts of the study.

Discussions are continuing with the PI on any changes to be made to Wave 3 protocols. I have continued to informally discuss procedures for Wave 3 with Ed and we will have a more formal meeting to set up a time with the larger group (including Dan and Nick) in mid-September. The plan is to agree on a solution for Wave 3 that not only stays within the budget but is also finalized and tested before the end of the year.

Special Issues

Cost	Total Cost to Date (Direct + Indirect):	1,238,449.77
Aug 14, 2017	Estimated Cost at Completion (E\$AC):	1,454,958.42
	Total Budget:	1,427,000.00
	Variance (Budget minus E\$AC):	-27,958.33
	Reason For Variance:	

Projections	Dollars Projected For Month:	0.00
Aug 14, 2017	Actual Dollars Used:	0.00
	Variance (Projected minus Actual):	0.00
	Reason For Variance:	

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

Other Measures

Project Name Optimizing Youth Suicide Risk Screening and Triage In the Emergency Department (YRS)

Project Mode Primary: Telephone Total of Modes: 1

Project Type Sponsored Projects **Project Status** Current

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

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

Funding Agency
IRB

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

Project Team

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

Proposal #: no data

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

SRO Project Period 03/2015 - 12/2017

Data Col Period 07/2015 - 07/2017

Security Plan NA

Milestone Dates

<i>PreProduction Start:</i>	<i>Pretest Start:</i>
<i>Pretest End:</i>	<i>Recruitment Start:</i>
<i>Staffing Completed:</i>	<i>GIT Start:</i>
<i>SS Train Start:</i> 09/21/2015	<i>SS Train End:</i> 09/24/2015
<i>DC Start:</i> 09/28/2015	<i>DC End:</i>

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 Aug, 2017 (YRS) **Project Phase** Implementing

Risk Level On Track

Monthly Update Technical systems and programming are being modified and tested. Plans for training in September are underway. Enrollment has started at the sites involved in the study and so 3 month follow-ups will start the beginning of October.

Special Issues

Continued change in Data Managers introduces additional risk to this project, meetings will be held with Unit Head to review plans for coverage..

Cost
Aug 31, 2017

Total Cost to Date (Direct + Indirect): 1,043,793.51
Estimated Cost at Completion (E\$AC): 1,960,352.65
Total Budget: 1,979,245.00
Variance (Budget minus E\$AC): 18,892.35
Reason For Variance:

We have not yet started Study 2 which we expect will be higher volume than Study 1 so anticipate there may be some additional labor costs that will be easier to project when data collection starts

Projections
Aug 31, 2017

Dollars Projected For Month: 27,646.02
Actual Dollars Used: 27,350.12
Variance (Projected minus Actual): 295.90
Reason For Variance:

Measures

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

Other Measures

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

Project Name	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:	<p>The Transition to Adulthood Study (TAS) is a supplemental study of the PSID, a national, longitudinal study of families started in 1968.</p> <p>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.</p>					
SRO Project Period	05/2017 - 06/2018					
Data Col Period	10/2007 - 05/2018					
Security Plan	NA					
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="padding: 5px;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>				PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:					
Other Project Team Members:						
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	Aug, 2017 (PSID TAS 2017)	Project Phase	Planning
Risk Level	Not Rated		
Monthly Update	<p>In the month of August, we have completed the TAS 2017 pretest and finalized the TAS 2017 budget.</p> <p>Additional work in August has included finalizing technical system programming and hiring. The TAS 2017 project will staff 30 iwers, 1 PC and 2 TLs.</p>		
Special Issues			

Cost
Aug 31, 2017

<i>Total Cost to Date (Direct + Indirect):</i>	73,508.14
<i>Estimated Cost at Completion (E\$AC):</i>	0.00
<i>Total Budget:</i>	1,904,835.00
<i>Variance (Budget minus E\$AC):</i>	0.00
<i>Reason For Variance:</i>	

Projections
Aug 31, 2017

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

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

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 Orłowski 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	<table border="1" style="width: 100%;"> <tr> <td>PreProduction Start: 01/04/2016</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start: 03/24/2016</td> </tr> <tr> <td>Staffing Completed: 06/23/2017</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start: 06/01/2016</td> <td>SS Train End: 06/30/2017</td> </tr> <tr> <td>DC Start: 06/06/2016</td> <td>DC End:</td> </tr> </table>			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:
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	Aug, 2017 (PSID-Imm)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	NOTE: Cost Report data are from July-close.		
	Ended FTF effort and overnight travel on 8/7. Continued End Game.		
Special Issues			

Cost
Jul 31, 2017

Total Cost to Date (Direct + Indirect): 1,445,165.74
Estimated Cost at Completion (E\$AC): 1,567,413.64
Total Budget: 1,901,212.00
Variance (Budget minus E\$AC): 333,798.36
Reason For Variance: Less programming, no new-hire recruitment, smaller in-person training, fewer lines--in fewer areas, fewer iwers

Projections
Jul 31, 2017

Dollars Projected For Month: 81,964.79
Actual Dollars Used: 81,894.59
Variance (Projected minus Actual): 70.20
Reason For Variance: very minor estimation error

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:			
Current actual:	919	63	6.5
Estimate at Complete:			
Variance:			

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:	<p>SWEL is a study to assess the role of cardiovascular stress in daily lives among matched test and control groups of ethnic minority and white respondents. Data collected via an interviewer-administered 30-min instrument, followed by a 4-day measurement of cardiovascular activity using a wearable biometric device, and 6-per-day self-administered momentary assessments.</p> <p>Data collection goal: 300 CAPI interviews (79% RR on sample of ~380), revised to test/control setup in which 150 interviews are needed from 173 test subjects (87% RR) and 150 interviews from the 307 control subjects (48% RR).</p> <p>Sample: Participants in Wave 3 of Social Relations (2014) from the Detroit tri-county area.</p> <p>Data collection period: estimated for 13 weeks but both the staffing levels and the proposed data collection pace is being discussed with the client given the availability of the wereable devices.</p>												
SRO Project Period	12/2016 - 10/2017												
Data Col Period	06/2017 - 09/2016												
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%;"> <tr> <td>PreProduction Start: 03/01/2017</td> <td>Pretest Start: 06/27/2017</td> </tr> <tr> <td>Pretest End: 09/28/2017</td> <td>Recruitment Start: 11/01/2017</td> </tr> <tr> <td>Staffing Completed: 12/21/2017</td> <td>GIT Start: 07/10/2017</td> </tr> <tr> <td>SS Train Start: 01/29/2018</td> <td>SS Train End: 02/02/2018</td> </tr> <tr> <td>DC Start: 02/04/2018</td> <td>DC End: 07/29/2018</td> </tr> </table>			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
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	Aug, 2017 (SWEL)	Project Phase	Implementing										
Risk Level	Not Rated												
Monthly Update	The SWEL Pilot, carried out by the LCD project team, is 50% completed with 20 respondents and data is being analyzed. Preliminary data analysis is difficult given the complexity and richness of data obtained from the												

instrumentation. The next 20 respondents will be invited starting early September and their Blood Pressure will be measured using a different instrument - a CareTaker device. Data from the first 20 and the CareTaker 20 respondents will be compared for levels of accuracy in measuring Blood Pressure.

Given the progress of the pilot a decision was made to postpone SWEL training until early February 2018 with a projected data collection period of 6 months ending in July 2018.

Several factors: the extension of SWEL performance period, pilot experiences, and revisions to the scope led to re-budgeting of SRO SWEL cost currently being done in cooperation with SWEL SPA and the proposal group. The key components of additional costs include a) additional management time as a result of the extension b) increase in the level of tech / help desk support needed to ensure interviewers/respondents' issues with devices are dealt with timely and do not result in non-response and c) changes in scope (number of devices, data collection period, increase in baseline interview length).

Special Issues

SWEL is being re-budgeted.

Cost

Aug 07, 2017

Total Cost to Date (Direct + Indirect):	116,964.41
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

Aug 07, 2017

Dollars Projected For Month:	39,487.98
Actual Dollars Used:	13,033.41
Variance (Projected minus Actual):	26,454.57
Reason For Variance:	

Project is being re-budgeted given the timeline changes. Original budget involved data collection start in October. Current data collection start is projected for January. Resulting costs for July are lower than projected.

Measures

	Units Complete	RR	HPI
Current Goal:	300	79%	
Goal at Completion:	300	87% / 48%	
Current actual:			
Estimate at Complete:			
Variance:			

Other Measures

Project Name	Surveys of Consumer Attitudes (SCA 2017)				
Project Mode	Primary: Telephone Total of Modes: 1				
Project Type	Sponsored Projects	Project Status	Current		
Budget	Direct Budget: 859,872.00	Indirect Budget: 0.00	Total Budget: 859,872.00		
Principal Investigator/Client	Dr. Richard T. Curtin (SRC)				
Funding Agency	Bloomberg, others for Riders.				
IRB	HUM#: exempt	Period Of Approval:			
Project Team	Project Lead: Joseph Matthew Matuzak Budget Analyst: Dean E Stevens Production Manager: Senior Project Advisor: Mary P Maher Production Manager: Production Manager:				
Proposal #:	no data				
Description:	<p>The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations.</p> <p>The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 600 interviews.</p>				
SRO Project Period	12/2016 - 12/2017				
Data Col Period	12/2016 - 12/2017				
Security Plan	NA				
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="padding: 5px;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>			PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:				
Other Project Team Members:	Dave Dybicki Ann Munster Kelley Popielarz Pamela Swanson Jennie Williams LaVelvet Harrison Paul Burton Nancy Walker Tim Wright				
Other Project Names:					
Sample Mgmt Sys	SMS				
Data Col Tool	Blaise 4.8				
Hardware	Desktop				
DE Software	Blaise 4.8 BIA				
QC Recording Tool	DRI-CXM				
Incentive	Not used				
Administration	SRO Group				
Payment Type	NA				
Payment Method	NA				

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

Risk Level*Attention!***Monthly Update**

SCA completed its August study on time, finishing with 602 completed interviews with the desired split: 402 RDDs and 200 Recons. This was done with an instrument of 27.1 minutes in length. We used 2119.4 interviewer hours and had an HPI of 3.52, a disappointment considering July was a longer instrument with almost the same HPI, and last year was also slightly longer but had a significantly lower HPI of 3.04. SCA delivered a solid prelim total of 425 completes, but it also had a extra week to do so, and struggled as the end of the month neared, largely through lack of contact, despite releasing more sample lines (and also accumulating more non-sample cases) than ever before. SCA also saw its highest ever rate of no contact on sample lines, with over 57% of its active sample lines coded as no contact. SCA trained and added eight new interviewers in August, and continued to focus on improving contact skills through workshops.

Special Issues

SCA continues to run higher than expected on HPI and on interviewer attrition. This keeps pushing up costs, and we have already spent more in training costs and QC than was anticipated in the entire annual budget. It was determined in August that SRO would permanently take over instrument programming for the monthly.

Cost**Aug 18, 2017**

Total Cost to Date (Direct + Indirect): 604,058.45
Estimated Cost at Completion (E\$AC): 993,178.32
Total Budget: 859,872.00
Variance (Budget minus E\$AC): -133,306.32
Reason For Variance: Interviewer hours are overall running much higher than expected.

Projections**Aug 18, 2017**

Dollars Projected For Month: 75,204.00
Actual Dollars Used: 73,633.71
Variance (Projected minus Actual): -12,103.15
Reason For Variance: Higher than anticipated HPI and additional interviewer hours.

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:	600	8	3.40
Current actual:			
Estimate at Complete:	602	7	3.52
Variance:	2	-2	0.12

Other Measures

Project Name	Sustainability Cultural Indicators Program-2017 (SCIP-2017)												
Project Mode	Primary: Web Total of Modes: 1												
Project Type	Sponsored Projects	Project Status	Current										
Budget	Direct Budget: 0.00	Indirect Budget: 0.00	Total Budget: 0.00										
Principal Investigator/Client	John Callewart (UM-Graham Environmental Sustainability Institute) Robert Marans (UM-Survey Research Center)												
Funding Agency													
IRB	HUM#: 00068573	Period Of Approval:											
Project Team	Project Lead: Donnalee Ann Grey-Farquharson Budget Analyst: Carl S Remmert Production Manager: Senior Project Advisor: Stephanie A Chardoul Production Manager: Andrew L Hupp Production Manager:												
Proposal #:	no data												
Description:	The goal of the overall Sustainability Cultural Indicators Project (SCIP), a joint project of the Institute for Social Research (ISR) and the Graham Environmental Sustainability Institute (Graham), is to measure changes in sustainability-related knowledge, commitments, and practices in the University of Michigan (U-M) community over time. The principle component of SCIP is a large-scale annual survey, to be conducted with U-M students, faculty, and staff from 2012 to 2018.												
SRO Project Period	07/2017 - 06/2018												
Data Col Period													
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%;"> <tr> <td>PreProduction Start: 07/01/2017</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start:</td> </tr> <tr> <td>Staffing Completed:</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start:</td> <td>SS Train End:</td> </tr> <tr> <td>DC Start: 01/16/2018</td> <td>DC End: 02/22/2018</td> </tr> </table>			PreProduction Start: 07/01/2017	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start: 01/16/2018	DC End: 02/22/2018
PreProduction Start: 07/01/2017	Pretest Start:												
Pretest End:	Recruitment Start:												
Staffing Completed:	GIT Start:												
SS Train Start:	SS Train End:												
DC Start: 01/16/2018	DC End: 02/22/2018												
Other Project Team Members:	Donnalee Grey-Farquharson - instrument revisions/project management Andrew Hupp - methodological experimental design Carl Remmert - financial support and analysis Hueichun Peng - programming for dissertation research Minako Edgar - sample prep, dataset creation, GIS analysis Andrew Piskorowski - Paradata design Dan Zahs - weighting and sampling support Felicita Mittereder - analysis (PhD student implementing experiment for dissertation) Campus Sustainability												
Other Project Names:													
Sample Mgmt Sys	MSMS												
Data Col Tool	Blaise 5												
Hardware	NA												
DE Software	N/A												
QC Recording Tool	N/A												
Incentive	Yes, Other (A portion of R's (a raffle))												
Administration	SRO Group												
Payment Type	Other (Amazon gift code)												
Payment Method	Other (Amazon gift code sent via e-mail)												
Report Period	Aug, 2017 (SCIP-2017)	Project Phase	Planning										
Risk Level	On Track												
Monthly Update	2017-08 No work was done in August. Donnalee will be coming on to the project as the manager. Andrew H. will provide oversight. They have a meeting scheduled to discuss the project when he returns from vacation. There is a meeting scheduled with the various UM stakeholders that have interest in the content of the SCIP on September 22. Andrew H.												

and Donnalee will attend. They will meet with the PIs (unscheduled) after that to discuss the 2017 design. Andrew H. will work with Donnalee to enter CRS projections in September.

2017-07

No work was done in July. Planning meetings with the PI will begin in September. The survey will be conducted in January rather than the usual fall. The university is planning a DE&I survey in the fall. This year, a PhD student is planning on conducting an experiment for her dissertation. The SRO SCIP team has met with her a couple of times over the summer. Another meeting is planned in early August. She has funding for the TSG to implement her design. Those costs are not reflected in the SCIP budget in CRS.

Special Issues

Cost Sep 30, 2017	Total Cost to Date (Direct + Indirect):	0.00
	Estimated Cost at Completion (E\$AC):	0.00
	Total Budget:	0.00
	Variance (Budget minus E\$AC):	0.00
	Reason For Variance:	

Projections Sep 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:	6,000	30%	NA
Goal at Completion:			NA
Current actual:	NA	NA	NA
Estimate at Complete:			NA
Variance:			NA

Other Measures