Survey Research Operations

Monthly Project Report

Sponsored Projects

September 2016

Sponsored Projects

(ABCD) Adolescent Brain Cognitive Development
(A-STARRS LS) Army Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study
(CogUSA Saliva) CogUSA Tablet and Saliva Collection
(DMACS) Detroit Metropolitan Area Survey
(HCAP 2016) Harmonized Cognitive Assessment Protocol
(HRS 2016) Health and Retirement Study
(HCDC, H&C) Housing & Children
(HRS LHMS 2015) HRS Life History Mail Survey 2015
(MTTS) Mathematics Teachers & Teaching Study
(MTF-WPSP Year 2/MTF Illume Web 2016) Monitoring the Future Web Programming and Survey Pilot
(MTF Tablet Pilot) MTF Base Year Tablet Pilot
(NSFG 2010-2020) National Survey of Family Growth
(AHRB) Neurodevelopmental Pathways in Adolescent Health Risk Behavior
(YRS) Optimizing Youth Suicide Risk Screening and Triage In the Emergency Department
(PSID All Stars) PSID Web Explore Core
(PSID-WB) PSID Wellbeing
(SN&WB) Social Networks and Well Being
(SCA 2016) Surveys of Consumer Attitudes
(SCIP-2015) Sustainability Cultural Indicators Program-2015

Project Name	Adolescent Brain Cognitive Development (ABCD)
Project Mode	Primary: Mixed Secondary: Mixed Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	***Direct Budget:*** 277,805.00 ***InDirect Budget:*** 0.00 ***Total Budget:*** 430,596.00
Principal Investigator/Client	Mary Heitzeg (UM Dept of Psychiatry)
Funding Agency	NIH
IRB	***HUM#:*** HUM00106316 ***Period Of Approval:*** 9/10/2015-1/7/2017
Project Team	***Project Lead:*** Karin Schneider
	Budget Analyst: Janelle P Cramer
	Production Manager: _UnAssigned
	Senior Project Advisor: Stephanie A Chardoul
	Production Manager: _UnAssigned
	Production Manager: _UnAssigned
Proposal #:	no data
Description:	ABCD is a longitudinal study of about 10,000 children from ages 9-10 through early adulthood to assess factors that influence individual brain development trajectories and functional outcomes. UM Dept of Psychiatry is one of 19 research sites across the country.
	Sampling statisticians from our Stat and Methods Unit identified all public and private schools with children aged 9-10 within the geographic catchment area for each site. This activity was under a separate contract and the initial selection of four replicates has been distributed to all research sites. SRO received an electronic data file listing all selected schools in the UM catchment area.
	SRO will target the recruitment of 54 schools from Michigan, who will consent to distribute recruitment letters to parents for participation in the ABCD study. Respondent contact information will be returned directly to the Michigan research team for additional activities, including screening for eligibility. (Parents return cards with their contact information directly to the PI's staff.)
SRO Project Period	05/2016 - 03/2018
Data Col Period	05/2016 - 02/2018
Security Plan	NA

Milestone Dates

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

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

Report Period	Sep, 2016 (ABCD) **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	We are doing great! 13 schools have agreed to participate, our overall goal is 54 schools (over two years). We are trying to reach out to most of replicate 1 and 2 schools so the clinic will have enough families to schedule over

October and November (they need at least 6, and would really like 9, subjects per week in the fMRI). We have had a disappointing response from three unfortunately large school districts, but will come back to them next year to see if we can obtain some cooperation. So, we continue to recruit other Rep 1 and 2 schools.   We have brought on another team member from the SSL to help with school outreach and follow up.

Special Issues

Cost
Aug 30, 2016

Total Cost to Date (Direct + Indirect):	21,030.00
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 30, 2016

Dollars Projected For Month:	20,000.00
Actual Dollars Used:	20,000.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	No overrun projected at this time

Measures

	Units Complete	RR	HPI
Current Goal:	54		
Goal at Completion:	54		
Current actual:	13		
Estimate at Complete:	54		
Variance:			

Other Measures

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

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

Funding Agency Department of Defense

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

Project Team
Project Lead:	Nancy J Gebler
Budget Analyst:	William Lokers
Production Manager:	Ruth B Philippou
Senior Project Advisor:	Mary P Maher
Production Manager:	Margaret Lee Hudson
Production Manager:	Andrew L Hupp

Proposal #: no data

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

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

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

Other Project Team Members: Heather Schroeder, Leah Roberts, Rachel LeClere, Ryan Yoder, Laura Yoder, Andrew Piskowrowski, Lisa Lewandowski-Romps, Lamont Manley, Emily Blaczyk, Genise Pattulo,

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 Sep, 2016 (A-STARRS LS)   **Project Phase**   Implementing

Risk Level *Some Concerns*

Monthly Update Activities for September 2016 include:
Project Management and Planning:
• We began production data collection on September 12. We are sending production updates to the PIs twice weekly.
• We are meeting weekly with the ODUSA to discuss the safety plan and address lookup activities. Everything is

going smoothly, and the teams are working well together.
•   We are working with Harvard University to update the assumptions used in the current five-phase contact protocol. We are closely tracking the results of our early sample releases to evaluate our design and provide Harvard with the information needed to make adjustments that optimize the design and ensure that we stay within our data collection budget.
•   We anticipate providing Harvard with a preliminary dataset containing survey data and paradata from the first four weeks of data collection in late October, to allow time for analysis and decisions on updates to the survey instruments. We plan to submit an IRB protocol in early December; and launch the next version of the questionnaires in February (assuming all necessary IRB and Army approvals are received by that time)
•   We submitted and received IRB approval for an amendment that archives the study documents used for the pilot. This has been forwarded to USUHS for secondary review.
•   It has been determined that the Army Analytics Group will submit an IRB protocol for the use of the GAT data, in lieu of executing an individual investigator agreement with Michigan for Dr. Mason. We submitted an IRB modification containing the Army requirements for the GAT data, at the request of our IRB.
•   We are prepared to meet with the research team and Army to discuss the Special Operations Forces (SOF) budget and design (expected in early October).

Enclave and User Support:
•   Members of the Enclave IT team submitted the checklist of items for the annual security review.
•   We are developing a memo outlining the security setup and policies for the servers holding personally identifying information (PII), in response to an Army request for a non-governmental Authority To Operate (ATO) memo.
•   We negotiated with the Ann Arbor Veteran Affairs office to provide digital fingerprint service for individuals being added to the UMich Enclave team.
•   Background check and Flux user access requests have been processed throughout the month.
•   The enclave team continues to answer user questions and process data transfer requests as needed; and continues to receive, track and process requests for new software and license renewals as needed.
•   We continue to support the analysis teams using the Army STARRS data. This month we provided additional sample information for the SHOS-B sample, and are addressing a question about the AAS sample weights.
•   We received Army approval to export the full NSS, AAS and PPDS primary datasets (including the selected Army variables approved to for use as primary data) onto the UM Flux system. We are prepared to transfer the files using our standard export review and approval process when the files are prepared and PI approval is granted.
•   We are planning to load the STARRS-LS survey data on a quarterly basis. The first load (for interviews completed September – November 2016) will take place ~February 2017.
•   We are planning for a webinar on the use of the STARRS data available through ICPSR. The PI's will be involved with the presentations.

Data Collection Progress and Plans:
•   Production data collection began September 12.
•   We trained a total of 5 team leaders and 15 interviewers in the Survey Services Lab this month. This team will start Phase 3 calling on October 5.
•   As of September 29, the production statistics are as follows:
o   Replicates released: 1-2, with a total of 2006 sample lines.
o   Completed web interviews: 139
o   Completed CATI interviews: 1
•   Table 1 below shows response rate by phase. It is still very early, but so far we have met our Phase 1 response rate goal and expect to meet our Phase 2 response rate goal for the first replicate. This is a replicate primarily made up of active duty Soldiers who are scheduled to leave the Army (or renew their commitment) soon. Replicate 2 has a large proportion of participants who are no longer in the Army.

Table 1: Response Rate by Replicate and Phase, as of 29 September 2016

	Phase 1	Phase 2	Phase 3a	Phase 3b	Phase 3c	Phase 4a	Phase 4b	Phase 5
	Letter, Coin	Email, text	$100, no calls	$50, calls	$100, calls	$100, calls	$100, no calls	End Game
Weeks	1	2-3	4-5	4-5	4-5	6-7	6-7	8-9
RR Goal	2%	12%	15%	15%	25%	15%	15%	15%
Rep 1	2.9%	11.0%*	N/A	N/A	N/A	N/A	N/A	N/A
Rep 2	0.4%*	N/A	N/A	N/A	N/A	N/A	N/A	N/A

*Phase still being worked, response rate not final.
N/A = Not Available

Table 2 shows interview length by mode and platform. The web interview length is currently averaging 44.8 minutes for production, which is a big improvement over the 59.4 minute average for the pilot.

Table 2: Web Interview Length by Platform, as of 29 September 2016

Last Platform	Completes	Mean	Min	Max

PC 96 44.0 13.2 99.2
Smartphone 42 46.4 26.0 83.6
Tablet 1 60.9 60.9 60.9
Web Total 139 44.8 13.2 99.2

PC 96 44.0 13.2 99.2
Smartphone 42 46.4 26.0 83.6
Tablet 1 60.9 60.9 60.9
Web Total 139 44.8 13.2 99.2

Cost Report:

Our estimate of current costs, and a preliminary cost-to-complete projection by task and project year is shown in Table 3 below. We spent a total of $173,764 in August 2016 on pre-production planning, programming and testing, hiring and training, and enclave support activities. We are currently projecting a deficit of $366,134 for the total project (2.9% of the total budget), increasing our projected total cost by $326,111 from last month's report. The majority of this change came from staffing changes and a projected increase in data management hours needed to manage the data transfers from the ODUSA and the vendor distributing the recorded messages and the end-game IVR interviews. We will continue to closely monitor the results of the first few replicates of production. We will use the early results to fine-tune our cost estimates and make adjustments to ensure that we stay within budget for the total project.

Table 3: STARRS LS Cost Report for August 2016

	Pre & Post Production*	Data Collection**	Project Management	Enclave and User Support	Grand Total
Year 1 Budget	$570,566	$55,702	$247,428	$245,622	$1,119,318
Actual Year 1 Costs	$503,866	$18,789	$295,639	$223,616	$1,041,910
Variance	$66,700	$36,913	($48,211)	$22,006	$77,408
Year 2 Budget	$574,123	$1,976,966	$462,928	$618,848	$3,632,865
Actual Costs through July 2016	$651,578	$96,920	$278,507	$292,861	$1,319,867
Actual Costs for August 2016	$66,639	$22,391	$40,787	$43,857	$173,674
Projected Costs Sept-Nov 2016	$184,674	$503,394	$121,105	$176,957	$986,130
Total Year 2 Projected Cost	$902,891	$622,706	$440,400	$513,675	$2,479,672
Variance	($328,768)	$1,354,260	$22,528	$105,173	$1,153,193
Year 3 Budget	$400,008	$1,981,395	$476,249	$603,408	$3,461,060
Year 3 Projected Total Cost	$449,235	$2,397,416	$498,835	$654,529	$4,000,015
Variance	($49,227)	($416,021)	($22,586)	($51,121)	($538,955)
Year 4 Budget	$280,594	$1,055,329	$410,278	$654,463	$2,400,664
Year 4 Projected Total Cost	$343,211	$1,471,980	$427,057	$697,490	$2,939,738
Variance	($62,617)	($416,651)	($16,779)	($43,027)	($539,074)
Year 5 Budget	$263,619	$805,264	$418,806	$636,637	$2,124,326
Year 5 Projected Total Cost	$326,756	$1,212,725	$432,393	$671,158	$2,643,032
Variance	($63,137)	($407,461)	($13,587)	($34,521)	($518,706)
Total Budget	$2,088,910	$5,874,656	$2,015,689	$2,758,978	$12,738,233
Total Projected Cost at Completion	$2,525,960	$5,723,616	$2,094,323	$2,760,467	$13,104,367
Total Variance	($437,050)	$151,040	($78,634)	($1,489)	($366,134)

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

Special Issues

Areas of Risk, Mitigation Strategies:
We continue to track several areas of risk, and develop mitigation strategies.
- Respondent participation.
o We are closely tracking our estimates of response rates for each phase of the contact protocol. The preliminary response rates are in line with our initial assumptions, but it is still very early in the project. We will know more when the first few replicates have run through all of the contact phases.
o We are working with Harvard to track early results and will modify the contact protocol as needed to optimize cost and response rate, and to keep the project within budget.
o We continue to discuss our text-messaging protocol with UM OGC and the SRC Director to insure compliance with recent changes in the TCPA ruling.
- Data transfers
o The work with our recorded message and IVR vendor is going well, but we are finding that it is requiring substantial data management resources to move files back and forth multiple times for each replicate. The file transfers between ODUSA and data cleaning of the manual address updates are also fairly labor intensive. We are working to automate these processes as much as possible as we work through the first few replicates.
- Locating respondents.
o Approval to receive batch address updates from DEERS has been requested, but is not yet approved. In the meantime, we are submitting sample lists to the ODUSA for manual look-ups prior to the release of each sample replicate. This is a very time consuming process for the ODUSA staff, and they have added another person to their team to keep up with the volume. If necessary, we will coordinate with Harvard and ODUSA to prioritize the cases being worked by ODUSA.
o The request for approval for the ODUSA contractors to submit Social Security Number to Accurint for batch locating is still pending with the Army. In the meantime Michigan will continue to submit the sample to Accurint, to get as much contact information as possible without the use of SSN.
o We also are asking respondents for their consent to use SSN for locating in the STARRS-LS instrument. We are experiencing a high consent rate in the first weeks of production. This will help us obtain good address updates in future waves of data collection for consenting participants (but it does not help us with locating those who do not participate in STARRS-LS).
- New technical systems.
o The new technical systems have been working well in the early weeks of production. Some of the processes require more manual inputs and data manager time than anticipated, and we will work with our developers to identify and implement system upgrades to help improve our efficiency as quickly as possible.
o We are also learning that the initial processing of the metadata from the production instruments is going to be more time intensive than anticipated. We will release the initial preliminary dataset to Harvard in late October with minimal post processing. We have added a few weeks into the Enclave loading schedule for the first quarter of survey data, to give the team a little extra time to work with the metadata.
- Background checks.
o We continue to experience long wait times for background checks. This impacts new analysts hired for work on STARRS, who must have a background check before they are given Enclave access. It also is resulting in slower than usual response to requests for laptops for new analysts, as we have had some turnover in our IT support team and the new team members are not yet cleared to work on Enclave laptops.
o We are working closely with the USUHS security officer who submits the background check requests, and keep project managers informed as we get progress updates.

Cost
Sep 14, 2016

Total Cost to Date (Direct + Indirect):	2,535,451.00
Estimated Cost at Completion (E$AC):	13,104,367.00
Total Budget:	12,738,233.00
Variance (Budget minus E$AC):	-366,134.00
Reason For Variance:	The variance is less than 3% of the total budget. We continue to adjust our projections on a monthly basis, and will keep our variance at or near zero by the time the project ends. It is still early in the project, and we are still negotiating the timing and scope for our production data collection activities.

Projections
Sep 14, 2016

Dollars Projected For Month:	209,511.00
Actual Dollars Used:	173,674.00
Variance (Projected minus Actual):	35,837.00
Reason For Variance:	We charged fewer hours than projected this month, primarily due an under-run on several nonsalary lines. We are moving unused expenses forward to future months where appropriate.

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	CogUSA Tablet and Saliva Collection (CogUSA Saliva)
Project Mode	Primary: Mail Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	***Direct Budget:*** 171,995.00 ***InDirect Budget:*** 266,593.00 ***Total Budget:*** 266,593.00
Principal Investigator/Client	Jack McArdle (USC) Brooke Helppie (UM/SRC)
Funding Agency	National Institute of Aging (NIA)
IRB	***HUM#:*** HUM00001406 ***Period Of Approval:***

Project Team

Project Lead:	Zoanne Blackburn
Budget Analyst:	Dean E Stevens
Production Manager:	Joseph Matthew Matuzak
Senior Project Advisor:	Kirsten Haakan Alcser
Production Manager:	
Production Manager:	

Proposal #:   no data

Description: The purpose of this study is to follow up with approximately 700 respondents from the last data collection wave of CogUSA. SRO will mail an advance letter, a pre-assembled tablet and saliva packets, and a reminder card to all respondents. Additionally, SRO will make an average of 4 follow-up calls to all respondents to schedule a delivery time and UPS pickup time and 3 telephone attempts to non-responders to remind them to return the tablets and saliva kits. SRO will log in returned saliva kits for storage at a local laboratory and return tablets to the PI at the conclusion of the study. We have budgeted for approximately 455 respondents to return their saliva samples and provide responses on the tablets.

This budget assumes an overall SRO involvement period of 5 months commencing in November 2015 with the data collection taking place during a 2-month period, beginning January 2016.

SRO Project Period	11/2015 - 04/2016
Data Col Period	01/2016 - 04/2016
Security Plan	NA

Milestone Dates

PreProduction Start: 11/01/2015	***Pretest Start:***
Pretest End:	***Recruitment Start:***
Staffing Completed:	***GIT Start:***
SS Train Start:	***SS Train End:***
DC Start: 01/25/2016	***DC End:*** 08/30/2016

Other Project Team Members:	Hueichun Peng, Shaowei Sun, Dave Dybicki, Minako Edgar, Emily Blasyck, David Bolt
Other Project Names:	
Sample Mgmt Sys	Project specific system (CMS)
Data Col Tool	Other (USC program on tablet computer)
Hardware	Tablet
DE Software	Other (CMS)
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post ($40); Cash, prepaid ($2)
Payment Method	Check through STrak RPay System; Imprest Cash Fund from ISR Business Office

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Report Period	Sep, 2016 (CogUSA Saliva) **Project Phase** Closing
Risk Level	*On Track*

Monthly Update   We have completed data collection except for trying to get the rest of the outstanding materials returned, preparing to hand over data and materials, and doing documentation.

We have 432 completed interviews, with seven tablets outstanding. We are continuing, on a very low level, trying to get those last few tablets returned, but we don't have high hopes of having them all come back. On the other hand,

one from April, where we had no contact with the respondent for several months, was returned in the last week.

All outstanding checks have been processed and mailed out.

Our clerk is finished with his work, and has moved on to another job. We are preparing to hand over tablets, get saliva samples into storage, and to fix the files that have been manually copied off and hand them over to study staff.

Final reports and lessons learned are in the final stages of being completed.

Special Issues

Cost
Sep 23, 2016

Total Cost to Date (Direct + Indirect):	239,867.21
Estimated Cost at Completion (E$AC):	248,110.36
Total Budget:	266,593.00
Variance (Budget minus E$AC):	18,482.64
Reason For Variance:	Shipping costs ended up being significantly lower than projected, and the difference on this pretty much matches the expected under-run.

Projections
Sep 23, 2016

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:	400		
Goal at Completion:	400		
Current actual:	432		
Estimate at Complete:	432		
Variance:	32		

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:	Barbara Lohr Ward
Budget Analyst:	Dean E Stevens
Production Manager:	Bridgitte Wyche McGee
Senior Project Advisor:	Kirsten Haakan Alcser
Production Manager:	Joseph Matthew Matuzak
Production Manager:	Bridgitte Wyche McGee

Proposal #:   no data

Description:

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

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

SRO Project Period	04/2016 - 02/2017
Data Col Period	07/2016 - 01/2017
Security Plan	NA

Milestone Dates

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

Other Project Team Members:

Barb Ward - Survey Director; Joe Matuzak - Project Manager; Dan Zahs - Sampling; Sue Hodge - SSA; Kirsten Alcser - SPA; Paul Schultz - programmer; Lisa Quist - data manager; J. Smith - Surveytrak programmer.

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

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Report Period	Sep, 2016 (DMACS)	**Project Phase**	Initiation

Risk Level   *Some Concerns*

Monthly Update   During September 2016, SRO activities included the following:

Task 1: Management, Budget and Work Plan
• Adjusted data collection plan, monthly projections and cost estimates.
• Adjusted timeline to reflect delay in launch
Task 2: Sampling
• Sample cleaning for mailing completed.
• Creation of sampleIDs completed
• Sample loaded into SurveyTrak and Illume

Task 3: Questionnaire Development
• Final changes made to Wave 1 instrument.
• Spanish translation completed by vendor.
• Translation reviewed by in-house staff, corrections made.
• Spanish version delivered to programmer IRB. IRB approval given.
• Drafting of Wave 2 support materials begun.

Task 4: CAI Programming
• Wave 1 web questionnaire drafts delivered, revisions made, approved.
• Draft versions of Wave 1 Spanish questionnaire completed.

Task 5: Systems Programming
• Email address set up for project
• SurveyTrak projects created, testing begun

Tasks 6, 7: Interviewer Recruitment & Hiring, Training
• Field interviewers identified and hired,
• SSL Spanish interviewer hired
• Training date set, then moved to October

Task 8: Main Data Collection
• Mail assembly has begun, in anticipation of mailing out all invitations on October 3rd

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

Cost information: Kresge Foundation funding

Total survey funding awarded:	$	256,770
Total Expended as of 8/31/2016	$	38135
Expected cost at complete	$	273,769
Expected Variance:	$	(17,000)

Cost explanation:
The cost estimate reflects survey funding awarded to Michigan (SRO) for data collection activities, current

expenditures, and estimated expenses to the end of the award.

The cost estimate projects an overrun, 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 is actually currently estimated to be $15,617, but it has been to the $17,000 that was originally anticipated because we have already pretty much used our programming hours, and there will likely be additional costs there.

Special Issues

Areas of Concern:

•   Budget/Expenses – The data collection budget continues to be challenging. Most line items are budgeted at the minimum possible amount. Changes in schedule or design will negatively impact the projected expenses.
•   This is considered to be a feasibility study. The design of the study is intended to determine if the proposed sampling and contact plan is a feasible way of developing a web survey panel. Response rates may be optimistic for the sampling/contact plan and schedule.
•   The project continues to run behind schedule due to late delivery of the questionnaire, and revisions made by the PIs. We have pushed back our launch of the data collection effort again to the end of September, and Wave 2 has been simplified and pushed up, with a one month rather than two month invitation time for respondents. We continue working to keep the PIs on schedule.

Cost
Sep 23, 2016

Total Cost to Date (Direct + Indirect):	38,135.00
Estimated Cost at Completion (E$AC):	272,385.99
Total Budget:	256,769.00
Variance (Budget minus E$AC):	17,000.00
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 is actually currently estimated to be $15,617, but it has been to the $17,000 that was originally anticipated because we have already pretty much used our programming hours, and there will likely be additional costs there.

Projections
Sep 23, 2016

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	Programming, translation, and preparation costs were pushed forward.

Measures

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

Other Measures

Project Name	Harmonized Cognitive Assessment Protocol (HCAP 2016)
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current

Budget	***Direct Budget:***	3,291,705.00	***InDirect Budget:***	1,185,014.00	***Total Budget:*** 4,476,719.00

Principal Investigator/Client	David Weir (SRC-ISR) Ken Langa (SRC-ISR) Lindsay Ryan (SRC-ISR)
Funding Agency	
IRB	***HUM#:*** HUM00099822 ***Period Of Approval:*** 3/17/2015 - 3/16/201
Project Team	***Project Lead:*** Evanthia Leissou ***Budget Analyst:*** Richard Warren Krause ***Production Manager:*** Dianne G Casey ***Senior Project Advisor:*** Mary P Maher ***Production Manager:*** Donnalee Ann Grey-Farquharson ***Production Manager:*** Anthony Romanowski
Proposal #:	no data
Description:	This project will involve the completion of a face-to-face CAPI interview, designed to provide a dementia assessment of HRS respondents. A sample of 5000 respondents (one per household) who are 65 years of age or older will be selected for this effort. The questionnaire will be administered to respondents after the HRS 2016 interview has been completed. The sample will not be clustered geographically; it will be selected randomly. It is expected that the field team will carry out well-planned regional trips in order to complete the 3000 in-person interviews. An informant interview will also be completed for each of the respondents interviewed. The respondent questionnaire length is expected to be 60 minutes. The informant questionnaire is expected to be 20 minutes and can be administered by telephone when the interviewer calls to set up an appointment with the respondent for the face-to-face interview.
SRO Project Period	01/2015 - 12/2017
Data Col Period	05/2016 - 02/2017
Security Plan	NA

Milestone Dates

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

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

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Report Period	Sep, 2016 (HCAP 2016)	**Project Phase**	Implementing
Risk Level	*Some Concerns*		
Monthly Update	As of October 2, we completed 906 Respondent and 757 Informant interviews. In mid August, 329 cases from release 1 and 2 received a priority flag. The priority was assigned based on		

Respondent characteristics. As of October 2, 149 priority interviews were completed.

Sample release #4 with 602 Respondent cases was made available to interviewers on September 21, 2016. The next release is planned for early November and estimated at ~800 cases.

The second interviewer training is scheduled for October 23-27. A total of 26 interviewers will be trained.

Special Issues

Cost
Sep 30, 2016

Total Cost to Date (Direct + Indirect):	1,583,334.34
Estimated Cost at Completion (E$AC):	4,954,703.16
Total Budget:	4,476,719.00
Variance (Budget minus E$AC):	-477,981.16
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.

Projections
Sep 30, 2016

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

Measures

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

Other Measures

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

Milestone Dates

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

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

Report Period	Sep, 2016 (HRS 2016) **Project Phase** Closing
Risk Level	*On Track*
Monthly Update	During the month of September, data collection for the new cohort component and panel component continued. Training of new hires and on-staffers was conducted at the end of August and end of September to add more interviewer hours in order to meet production targets. Technical Development: During the month of September, the Tech team focused on updating SurveyTrak for the main

project. Further development in production systems continues (including WebTrak and WebLog). Final adjustments are being made to the production reports and some 'tweaks' to the instrument have been released to interviewers.

Special Issues

Cost
Sep 30, 2016

Total Cost to Date (Direct + Indirect):	18,649,864.66
Estimated Cost at Completion (E$AC):	34,138,773.16
Total Budget:	33,579,127.00
Variance (Budget minus E$AC):	-559,646.16
Reason For Variance:	Projection refinements are ongoing for both Panel and New Cohort.

Projections
Sep 30, 2016

Dollars Projected For Month:	1,900,536.23
Actual Dollars Used:	1,721,733.81
Variance (Projected minus Actual):	178,803.00
Reason For Variance:	Actual dollars for the month of August came in under projections due to the following:

--Salary was 45K (5%) under for August
--Postage was 33K under (projected based on previous wave costs)
--Travel was 31K under projections
--Hosting was 30K under (over projected Colorado training)
(Adding indirects puts these near the $178,800 difference)

Measures

	Units Complete	RR	HPI
Current Goal:	24,162	88.5%	7.45
Goal at Completion:	24,162	88.5	7.45
Current actual:	12,254	46%	6.4
Estimate at Complete:	24,162	88.5	7.45
Variance:			

Other Measures

Goal for New Cohort is 5,228 interviews.
Goal for Panel Iws is 18,934 interviews.

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:** 7,449,944.00 **InDirect Budget:** 1,684,468.00 **Total Budget:** 9,134,412.00

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: 12/21/2016	**Recruitment Start:** 06/01/2016
Staffing Completed:	**GIT Start:** 05/09/2017
SS Train Start: 05/11/2017	**SS Train End:** 05/22/2017
DC Start: 05/26/2017	**DC End:** 05/24/2018

Other Project Team Members:

Other Project Names:

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

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Report Period	Sep, 2016 (HCDC, H&C)	**Project Phase**	Implementing

Risk Level · *Some Concerns*

Monthly Update · During Sept, 2016, SRO activities included the following:

Task 1: Management, Budget and Work Plan
% Task Spent to Date
- Held regular meetings with the research team to discuss design, deliverables, schedule, funding.
- Revised and updated project schedule.
- Prepared and submitted documents for pre-Pilot IRB submission at UM.
- Prepared and delivered documents for JHU IRB submission.
- Reviewed updates to Master subaward. Worked with UM OSRP and JHU to finalize subaward documents.
- Prepared invoices and invoice documentation.
- Concatenated, edited and delivered relevant study documents for submission to PHAs.
- Provided input for the cost estimate for preparation of the public use file.

Task 2: Sampling
% Task Spent to Date
- Continued work to refine selection models and algorithm for selection of the Pilot population sample.
- Began selection of Pilot sample.

Task 3: Questionnaire Development
% Task Spent to Date
- Continued elaboration of Pilot training agenda and training plans.
- Finalized format and content of SAQs. Submitted to PIs for approval. Submitted to vendor for printing.
- Began writing project manual chapters and preparation of powerpoint slides for modules during training. Submitted available drafts to research team for review.
-
Completed final formatting ofSAQs and other interview materials.Submitted to research team for approval. Began printing finalized project materials.
- Continued work to finalize interviewer supplies list/supplies organization and presentation.
- Prepared and delivered testing instructions to research team. Compiled list of data deliverables.
- Child Interview
o Developed additional testing scenarios.
o Conducted extensive iterative integrated testing. Made updates to pre-load and post-load as necessary to resolve integration issues.
o Changed specified order of DBS administration to place the heavy metals card first.
o Updated preload and post-load as necessary to conduct integrated testing.
o Conducted extensive testing on Hearts & Flowers. Documented data and performance deviations.
- Post Interview Observations
o Conducted iterative integrated testing.
o Finalized training protocol and room location for laser room measurement.
- Adult CAPI Questionnaire
o Developed additional testing scenarios.
o Conducted extensive iterative integrated testing. Made updates to pre-load and post-load as necessary to resolve integration issues.
o Modified pre-load-post-load specification as necessary.
- Screening Questionnaire
o Developed additional testing scenarios.
o Conducted extensive iterative integrated testing.
o Made updates to post-load as necessary to resolve integration issues.
- Thin Slice Training –
o Three SRC team members participated in Thin-Slice training Sept 26 – 30, led by the University of Toronto staff.

Task 4: CAI Programming
% Task Spent to Date
- Screener
o Iterative programming/bug fixes/testing
- Child
o Conducted iterative testing & programming.
o Updated pre-load and post-load
o Updated Thin Slice question presentation
o Updated blood spot order
o Programming/fixed integrated consent and payment documents
o Triaged programming issues with Hearts & Flowers integration
- PCG
o Finalized programming on the PCG interview, made updates as requested.
o Programmed the Household Roster Section
o Updated pre-load and post-load
o Iterative programming/testing
- Post Interview Observations
o Programmed updates to Adult and Child post-interview observations.
o Programmed updates to neighborhood observations and laser tape measurement data entry modules and prepared for testing.

Task 5: Systems Programming
- % Task Spent to date
- Continued elaboration of SurveyTrak specifications (SRC's sample management system). Clarified specifications on contact observations, added specification for respondent payment tab
- Conducted iterative programming/testing on SurveyTrak shell.
- Prepared for integrated testing.

Tasks 6, 7: Interviewer Recruitment & Hiring, Training
% Task Spent to Date
- Confirmed team of ten interviewers for the Pilot.
- Made training travel arrangements for interviewers.
- Finalized hotel arrangements for training
- Began specification of trips for travelers.

Task 8: Main Data Collection
% Task Spent to Date
- N/A

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

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

Task 11: Final Data Deliverables
% Task Spent to Date
- N/A

Special Issues

Areas of Concern:

•   Questionnaire development effort significantly exceeds our original estimates. While the impact to the budget is likely to be relatively marginal given the overall size and scope of the project, this does impose tension with respect to staying on track with the project timeline, which has already had to be shifted.

•   Corresponding to the increase in questionnaire development tasks and late finalization of specifications, Blaise and SurveyTrak programming is behind schedule. We are increasing staff hours for programming and testing in order to reduce the amount of elapsed time required to test and finalize instruments.

•   We are collaborating with other active SRC projects to staff for the pilot data collection, but we are attempting to balance assigning SRC experienced interviewers who may not continue with us, with getting project Team Leaders who will likely support us during main data collection and facilitate a more successful main study. The primary constraint is driven by the fact that nearly all SRC experienced interviewers are currently assigned to active data collection projects. Due to the short pilot data collection period, and the gap between Pilot and the main study, it is not practical to use new hires.

•   Considerably more training videos, which cover the full range of interaction behaviors, will be required for the "Thin Slice" measure of maternal cognitive sensitivity. The Thin Slice developers recommend recording at least 40 to 50 videos covering the full range of behaviors from low to medium to high. Almost all of the codeable videos from 2014 were in the medium to high range of behavior, which does not provide an adequate base of knowledge to train coders. The University of Toronto will not be able to share its existing bank of video-recordings.

•   A functional limitation has been discovered in the SRC-programmed Hearts and Flowers executable. If a user enters two keystrokes in response to a single stimulus, the program skips the next stimulus. This cannot be fixed prior to the Pilot.

Work Scope Changes:

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

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

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

Cost
Aug 31, 2016

Total Cost to Date (Direct + Indirect):	302,233.00
Estimated Cost at Completion (E$AC):	9,134,412.00
Total Budget:	9,134,412.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	

Projections
Aug 31, 2016

Dollars Projected For Month:	142,156.00
Actual Dollars Used:	116,300.00
Variance (Projected minus Actual):	25,855.00
Reason For Variance:	Sample development costs that were projected have not hit the project ($9000 direct). Other labor categories were slightly under budget, possibly reflecting vacation time scheduled in August.

Measures

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

Other Measures

Project Name	HRS Life History Mail Survey 2015 (HRS LHMS 2015)
Project Mode	Primary: Mail

Project Type	Sponsored Projects		**Project Status**	Current	
Budget	*Direct Budget:* 692,402.00	*InDirect Budget:* 249,263.00		*Total Budget:*	941,665.00

Principal Investigator/Client	Jacqui Smith Mary Beth Ofstedal

Funding Agency	NIA with SSA		
IRB	*HUM#:* HUM00106904	*Period Of Approval:*	10/01/15 - 04/30/16
Project Team	*Project Lead:*	Piotr Dworak	
	Budget Analyst:	Richard Warren Krause	
	Production Manager:		
	Senior Project Advisor:	Laura Yoder	
	Production Manager:		
	Production Manager:		

Proposal #:	no data
Description:	The HRS Life History Mail Survey (LHMS) is conducted for the first time in 2015. This research will provide important input into efforts to optimize the design of self-administered paper questionnaires to collect different types of life events. Obtained data will foster harmonization of available and newly collected data on HRS participants' life course.

LHMS sample includes English-speaking respondents who are not participating in the concurrent HRS 2015 CAMS mail study. Approximately 12,000 HRS participants will be invited to respond to the HRS 2015 LHMS paper questionnaire. There will be no face-to-face or telephone interviewing done during this study. All contact with the respondent will be via the mail although some respondents may call the dedicated HRS toll-free line. All of the mailings will be completed during the period of October 2015, through January 2016. The project will be finalized during the months of February and March 2016.

The LHMS questionnaire includes the following sections:
• A life history calendar where respondents are asked to note important events from their lives and age at when they occurred. This is intended to serve as a guide for them when completing the remainder of the questionnaire;
• A residential history section where respondents are asked to list all places of residence and any special circumstances (e.g., residing in institutional setting, military housing, etc.);
• An educational history section where respondents are asked about their schools and educational experiences such as the degrees they obtained, special skills attained, learning disabilities, participation in school and other activities and in organized sports or physical activities.

The LHMS questionnaire is expected to take 40 – 50 minutes to complete. The questionnaires will be available in English only.

Respondent protocol:

Respondents will be contacted a maximum of four times via mail. In the first mailing all subjects will receive relevant study materials including an invitation letter with the informed consent information sheet, a $25 incentive check, a questionnaire, a pre-addressed prepaid return envelope, and an address update card. Mailings will be separated by a minimum of three weeks.

Non-respondents may receive reminders and/or up to two repeat follow up questionnaire mailings. Some participants may also receive a pencil in the mailing to facilitate filling out the questionnaire. The last mailing may be sent via USPS priority mailer. All participants who return a completed survey will receive a thank you note.

The Survey Research Operations (SRO) unit of the Survey Research Center that conducts field activities for this project will also receive and handle any respondent calls regarding the survey; we expect approximately 100 respondent calls per week during production. A unique toll free line has been set up to accommodate these calls which will be answered by specifically trained contingent staff from the Survey Services Lab.

SRO Project Period	09/2015 - 04/2016
Data Col Period	10/2015 - 01/2016
Security Plan	NA

Milestone Dates	***PreProduction Start:*** 09/01/2015	***Pretest Start:***	
	Pretest End:	***Recruitment Start:*** 10/26/2015	
	Staffing Completed:	***GIT Start:***	
	SS Train Start:	***SS Train End:***	
	DC Start:	***DC End:*** 09/30/2016	

Other Project Team Members:	Piotr Dworak, Jeannie Baker
Other Project Names:	
Sample Mgmt Sys	SurveyTrak
Data Col Tool	SAQ
Hardware	Paper and Pencil
DE Software	External vendor (Caso (formerly Apperson))
QC Recording Tool	NA
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, prepaid (25)
Payment Method	NA

Report Period	Sep, 2016 (HRS LHMS 2015)	**Project Phase**	Closing
Risk Level	*On Track*		
Monthly Update	Project closing - we are reconciling the data scanned, writing up reports, and reconciling the final budget.		
Special Issues			

Cost
Oct 31, 2016

Total Cost to Date (Direct + Indirect):	699,153.00
Estimated Cost at Completion (E$AC):	653,271.00
Total Budget:	941,665.00
Variance (Budget minus E$AC):	288,393.59
Reason For Variance:	HRS initial budget estimate for year-end project is usually higher. We also had a lower response rate (less incentive costs)

Projections
Oct 31, 2016

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	We project further savings from lower incentive costs

Measures

	Units Complete	RR	HPI
Current Goal:	6500	0.59	
Goal at Completion:	7583	0.70	
Current actual:	6518	0.59	
Estimate at Complete:	6518	0.59	
Variance:	-1065		

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:*** 693,562.00 ***InDirect Budget:*** 382,855.00 ***Total Budget:*** 1,076,417.00
Principal Investigator/Client	Heather Hill (Harvard Graduate School of Education) Patty Maher (ISR PI)

Funding Agency

IRB	***HUM#:*** HUM90379	***Period Of Approval:*** 6/25/2014-6/25/2015	
Project Team	***Project Lead:***	Barbara Lohr Ward	
	Budget Analyst:	Dean E Stevens	
	Production Manager:	Russell W Stark	
	Senior Project Advisor:	Stephanie A Chardoul	
	Production Manager:	Anthony Romanowski	
	Production Manager:		

Proposal #:   no data

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

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

Milestone Dates

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

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

Other Project Names:

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

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Report Period	Sep, 2016 (MTTS)	**Project Phase**	Closing

Risk Level   *On Track*

Monthly Update

During Sept, 2016, SRO activities included the following:

Task 1: Management, Budget and Work Plan
• Revised monthly projections
• Prepared monthly report.
• Delivered budget and cover memo for deobligation of funds

Task 2: Sampling

Task 3: Questionnaire Development

Task 4: CAI Programming

Task 5: Systems Programming
• Data Management

Tasks 6, 7: Interviewer Recruitment & Hiring, Training

Task 8: Main Data Collection

Task 9: Post Collection Processing
• Ran ad-hoc reports as requested
• Prepared deliverable files – addresses, contact persons for districts, schools and teachers in the MTTS study
• Delivered data files for post-lesson logs and demographic questionnaires
• Worked on data book and final project documentation

Task 10: Weighting

Task 11: Final Data Deliverables

Task 12: Video Storage Systems (EWB)
• No activity.

Cost information: Harvard subcontract funded by the National Science Foundation

Total survey funding awarded:	$ 1,076,417
Total Expended as of 8/31/2016	$ 907,773
Expected cost at complete	$ 1,000,412
Expected Variance:	$ 75,313

Cost explanation:
The cost estimate reflects survey funding awarded to Michigan (SRO) for data collection activities, current expenditures, and estimated expenses to the end of the award. This report does not include a de-obligation of $57,000 that is in process. The estimate includes additional work scope to draw a sample for the MKT, periodically monitor the MKT sample using reports prepared by Harvard, and production of weights and non-response adjustments and assist with production of a methodology report.   In addition, the estimate includes additional sampling effort to draw a sample of unselected teachers for a non-response study that will be conducted by Harvard in the Fall of 2016, and develop weights and estimates for that new sample.

Special Notes:

Budget
- SRO has processed a budget de-obligation (not reflected in the numbers above) of $57,000 total cost.
- As noted above, labor for Sampling staff to draw a sample of unselected teachers for a Fall 2016 data collection, and to prepare weights and estimates for that sample, has been included in the current cost estimate. The financial projections now extend to December 2017, and will require a no-cost time extension.
- No reduction in estimated costs for the video data storage and technical support is assumed.

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

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

Special Issues

Cost
Oct 31, 2016

Total Cost to Date (Direct + Indirect):	907,773.00
Estimated Cost at Completion (E$AC):	10,000,412.00
Total Budget:	1,076,417.00
Variance (Budget minus E$AC):	75,313.00
Reason For Variance:	Expenses are lower than budgeted due to work scope changes and a lower than estimated response rate.

Projections
Oct 31, 2016

Dollars Projected For Month:	22,751.00
Actual Dollars Used:	2,926.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	Close out activities are delayed due to other production demands. EWB is not charging projected expenses.

Measures

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

Other Measures

Project Name	Monitoring the Future Web Programming and Survey Pilot (MTF-WPSP Year 2/MTF Illume Web 2016)
Project Mode	Primary: Web Secondary: Mail Total of Modes: 2

Project Type	Sponsored Projects		**Project Status**	Current

Budget	*Direct Budget:* 243,829.00	*InDirect Budget:* 134,105.00	*Total Budget:* 377,934.00

Principal Investigator/Client   Megan Patrick (UM-SRC)

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

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

Project Team

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

Proposal #:   no data

Description:

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

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

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

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

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

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

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

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

SRO Project Period   08/2012 - 08/2017

Data Col Period   04/2016 - 08/2016

Security Plan   Yes

Milestone Dates

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

Other Project Team Members: Gina-Qian Yang Cheung, Donnalee Grey-Farquharson, Hueichun Peng, Andrew Piskorowski (years 1 & 2), (Aaron Pearson - year 1), Max Malhotra, Lloyd Hemingway

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

Report Period	Sep, 2016 (MTF-WPSP Year 2/MTF Illu	**Project Phase**	Implementing

Risk Level   *Not Rated*

Monthly Update

Non-response calling was extended for one full week in September.

MTF Web Project Manager is currently working with the Proposal group and our Financial Analyst on the budget justification that reflects this change in scope and increased budget. Texting will now be used as a mode of communication though not for initial contact. Also, the previous budget did not include Winter location for 2017.

Below are some workscope changes that have contributed to the cost variance:

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

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

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

Special Issues

Cost
Aug 31, 2016

Total Cost to Date (Direct + Indirect):	219,346.47	
Estimated Cost at Completion (E$AC):	435,152.23	
Total Budget:	377,934.00	
Variance (Budget minus E$AC):	57,218.23	
Reason For Variance:	There is a request for an increase in workscope and this has been projected in CRS - budget justification is being drafted to request the extra funds	

Projections
Aug 31, 2016

Dollars Projected For Month:	54,503.22	
Actual Dollars Used:	49,916.33	
Variance (Projected minus Actual):	4,586.89	
Reason For Variance:	Some information needed from Study Staff in order to program was delayed.	

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:*	342,799.00	*InDirect Budget:*	188,540.00	*Total Budget:*	531,339.00

Principal Investigator/Client	Richard Miech (UM-SRC)

Funding Agency	National Institute on Drug Abuse (NIDA). Fall-only budget, direct: $67,163.00; Indir:$36,940.00; Total:$104,103.00		
IRB	*HUM#:* N/A	*Period Of Approval:* N/A	
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 - 10/2016
Data Col Period	10/2015 - 06/2016
Security Plan	Yes

Milestone Dates

PreProduction Start:		*Pretest Start:*	
Pretest End:		*Recruitment Start:*	
Staffing Completed:	01/31/2016	*GIT Start:*	
SS Train Start:	04/25/2016	*SS Train End:*	05/12/2016
DC Start:	05/18/2016	*DC End:*	11/18/2016

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) Note: Mike Nugent (SSL) is the field researcher for fall 2015. In spring 2016, MTF field staff will serve as FRs.
Other Project Names:	MTF Fall 2015 Tablet Pilot MTF Spring 2016 Tablet Pilot
Sample Mgmt Sys	SurveyTrak
Data Col Tool	Other (SurveyCTO)
Hardware	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 (spring-fall 2016 schools)); Cash,
Payment Method	Check through other system (Rpay spreadsheet); Imprest Cash Fund from ISR Business Office (Rpay spreadsh

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Report Period	Sep, 2016 (MTF Tablet Pilot)	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update	Sept activities:
	On 7/22, we submitted an IRB amendment for the fall data collections to remove the follow-up survey and instead carry out the hashed linking between the main survey and the contact info survey for the 12th graders. We could face IRB challenges in doing so, but the PIs agree we should tackle this sooner rather than later. And our piloting results in the fall will be much closer to what we would experience in "real" MTF sessions with this change. The fill IRB review date was 8/18 and we received approval on 8/25.
	After the IRB approval, final changes to the surveys and SHApp were put in place; stand alone instrument testing was carried out.

The MTF callers started calling the 5 remaining schools for fall admins. They are all still on board so we re-identified our pilot field researchers, started to think through helper options, made STrak assignments, ordered laptops, and started to nail down training dates.

Richard raised some concern about the response rate to the contact information survey (equivalent of contact postcard in paper-based MTF) from the one 12th grade spring administration. Many factors could be contributing to this, plus the fact that these data only come from 1 school. Nonetheless, we know there are workflow issues from the mail to the contact info surveys that could be improved, so we began toying around with a "tech-light" solution that might be tested out this fall - icons that take the student directly to each survey on the tablet kiosk screen.

Special Issues

Cost
Sep 30, 2016

Total Cost to Date (Direct + Indirect):	0.00
Estimated Cost at Completion (E$AC):	0.00
Total Budget:	531,339.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	

Projections
Sep 30, 2016

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

Measures

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

Other Measures

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

Project Type	Sponsored Projects		**Project Status**	Current

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

Principal Investigator/Client	Joyce Abma (NCHS) Mick Couper (ISR)
Funding Agency	NCHS, CDC, NICHD

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

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

Proposal #:	no data
Description:	The NSFG is a national survey of women and men 15-49 years of age designed to provide national estimates of factors affecting pregnancy and birth rates, including sexual activity, cohabitation, marriage, divorce, contraceptive use, miscarriage and stillbirth, infertility, and use of medical services for family planning and infertility. NSFG 2010-2020 includes eight years of continuous data collection starting in September 2011 and ending in 2019. Every year, new PSUs will be selected to replace last year's non-self representing PSUs and self-representing PSUs, and the project will continue to collect data from a set of major self representing PSUs throughout the entire data collection period. Target number of interviews is approximately 5000 per year.
SRO Project Period	09/2010 - 07/2020
Data Col Period	09/2011 - 06/2019
Security Plan	Yes

Milestone Dates

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

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

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Report Period	Sep, 2016 (NSFG 2010-2020)	**Project Phase**	Implementing

Risk Level	*On Track*
Monthly Update	Quarter 20 ended on September 10, 2016 and Q21, the first quarter of year 6, began on September 11th. Interviewer training was conducted Sept 9-14. 20 interviewers were hired, 1 dropped before training, 1 did not show up to training, 1 did not pass certification, and 1 quit within a few days of returning home. 16 new hires, 25 on-staffers and 4 travelers are currently staffed on the project. An attrition training is planned for mid-January to cover the 3 unstaffed PSUs as well as any other areas detected within the first 6 weeks of year 6. Year 5 ended with an underrun of approximately $220,000 given the aggressive cost-reduction strategies put in place the last two quarters of the year. Q20 response rates dropped to <70% for both males and females for the first time. Information presented below is regarding Q20 outcomes.

Special Issues   NCHS was notified on August 1st that they will receive full funding for year 6 data collection. As such, the budget will increase by approximately $1,100,000 which includes a supplement of $100,000 for methodological research. It is likely that we will have a significant underrun in year 5 due to production costs that are incurred in September, rather than the end of August, given the quarterly cycle as well as the effectiveness of the cost saving measures implemented.

Cost
Sep 09, 2016

Total Cost to Date (Direct + Indirect):	25,774,339.00
Estimated Cost at Completion (E$AC):	43,898,645.00
Total Budget:	41,101,388.47
Variance (Budget minus E$AC):	-2,797,257.00
Reason For Variance:	The budget for year 6 will be increased by approximately 1.1 million. Once the funding is received, the budget will be updated in CRS.

Projections
Sep 09, 2016

Dollars Projected For Month:	431,240.00
Actual Dollars Used:	410,733.00
Variance (Projected minus Actual):	20,507.00
Reason For Variance:	Interviewer travel and overtime were lower than projected given the restrictions put in place to reduce costs for the current year.

Measures

	Units Complete	RR	HPI
Current Goal:	1250	70%	9.0
Goal at Completion:	1350	75%	10.0
Current actual:	1240	68%	10.5
Estimate at Complete:	1240	68%	10.4
Variance:	95		.

Other Measures   The goals and actuals shown above are through week 12 of quarter 20.

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:** 815,655.00   **InDirect Budget:** 452,688.00   **Total Budget:** 1,268,343.00

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:** 3/4/2015 - 3/3/2016
Project Team
Project Lead: Meredith A House
Budget Analyst: Dean E Stevens
Production Manager: Kathleen S Ladronka
Senior Project Advisor: Stephanie A Chardoul
Production Manager:
Production Manager:

Proposal #: no data

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

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

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

PreProduction Start:		**Pretest Start:**	
Pretest End:		**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: Larry Daher, Emmanuel Ellis, David Bolt, Kyle Goodman, Donnalee Grey-Farquharson, Kyle Kwaiser (tech lead, data manager), Becky Loomis, Max Malhotra, Shaowei Sun, Laura Yoder (data management)

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

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Report Period	Sep, 2016 (AHRB)	**Project Phase**	Implementing
Risk Level	On Track		

Monthly Update

Sept activities:

Technical development of a portal for respondents to access their survey and neurocognitive tasks, and SRIS modifications for waves 2-3 continued. SRIS is being modified to be student rather than school-centric. Changes to the survey content and materials formatting are also in process.

The PI decided to offer a $30 incentive for the wave 2 survey activities. Wave 3 will offer at least $30, so we are using these amounts in our cost projections (one of the two other cost estimates with options for increasing the incentive amounts which were provided with the scope increase document).

The wave 2-3 IRB amendment was approved August 2 - the amendment describes using "passive" parental consent (parent opt-out) for minor participants.

The project lead roll will be transitioned from Meredith to Peter Batra between August and end of October.

Special Issues

Cost
Sep 30, 2016

Total Cost to Date (Direct + Indirect):	0.00
Estimated Cost at Completion (E$AC):	0.00
Total Budget:	1,268,343.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	The projections now include the re-work for two waves of follow-up data collections.

Projections
Sep 30, 2016

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

Measures

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

Other Measures

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

Project Type	Sponsored Projects	**Project Status**	Current

Budget	***Direct Budget:*** 917,405.00	***InDirect Budget:*** 505,822.00	***Total Budget:*** 1,423,227.00

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

Funding Agency

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

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

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

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

Other Project Team Members:	
Other Project Names:	
Sample Mgmt Sys	SMS
Data Col Tool	NA
Hardware	Desktop
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

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Report Period	Sep, 2016 (YRS)	**Project Phase**	Implementing
Risk Level	*On Track*		
Monthly Update	Interviewing continues to go well with three month and six month follow-ups. We have received the increased funding for Study 2 (supplement).		

We are working with PI to evaluate which "parent only" interviews should be counted as partial interviews-

Special Issues

Cost
Sep 30, 2016

Total Cost to Date (Direct + Indirect):	692,974.81
Estimated Cost at Completion (E$AC):	1,340,615.57
Total Budget:	1,423,227.00
Variance (Budget minus E$AC):	2,826.07
Reason For Variance:	

Projections
Sep 30, 2016

Dollars Projected For Month:	50,894.71
Actual Dollars Used:	48,675.06
Variance (Projected minus Actual):	2,219.65
Reason For Variance:	

Measures

	Units Complete	RR	HPI
Current Goal:	2447	85%	3.0
Goal at Completion:	4200	85%	3.0
Current actual:	3150	69%	1.2
Estimate at Complete:		70%	
Variance:			

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

Project Name	PSID Web Explore Core (PSID All Stars)
Project Mode	Primary: Web Total of Modes: 1

Project Type	Sponsored Projects	**Project Status**	Current

Budget	**Direct Budget:** 194,766.00 **InDirect Budget:** 108,096.00 **Total Budget:** 302,862.00
Principal Investigator/Client	Vicki Freedman (SRC-PSID) Kate McGonagle (SRC-PSID)

Funding Agency

IRB	**HUM#:** HUM00101072	**Period Of Approval:**	Non-regulated
Project Team	**Project Lead:**	Meredith A House	
	Budget Analyst:	Janelle P Cramer	
	Production Manager:		
	Senior Project Advisor:	Stephanie A Chardoul	
	Production Manager:		
	Production Manager:		

Proposal #:	no data
Description:	Phase 2 of converting the PSID core instrument to web. Phase 2 will use Blaise 5 and MSMS.

SRO Project Period	09/2014 - 08/2016
Data Col Period	06/2016 - 08/2016
Security Plan	NA
Milestone Dates	

PreProduction Start:		**Pretest Start:**	
Pretest End:		**Recruitment Start:**	
Staffing Completed:		**GIT Start:**	
SS Train Start:		**SS Train End:**	
DC Start:	07/05/2016	**DC End:**	08/12/2016

Other Project Team Members:	Jennie Williams = Data management; Youhong Liu/Peter Sparks = Blaise programming, Pam Swanson = MSMS set up; Jeff Smith = TSG oversight; Max Malhotra = Portal programming; Jim Rodgers and Gina Cheung = MSMS/integration leadership
Other Project Names:	PSID Webinizing Phase 2 PSID Conversion to Web
Sample Mgmt Sys	MSMS
Data Col Tool	Blaise 5
Hardware	Other (R Hardware)
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group; ISR Group (PSID)
Payment Type	Check, prepaid (100); Other ($10 Amazon gift card)
Payment Method	Check through other system (PSID RAPS); Other (Amazon gift cards)

Report Period	Sep, 2016 (PSID All Stars)	**Project Phase**	Implementing
Risk Level	On Track		

Monthly Update	Sept activities:

Replicate 2 (n=100) was released and invitation letter mailed 9/7/16. Reminder 1 was mailed 9/17 to 57 non-responders; reminder 2 was mailed 9/27 to 37

Timings and "other paradata" files were completed and delivered for the completes to date. Meredith and Jennie are still working on the format and content for the authentication portal data (we are collaborating with other data mgrs and projects as this will most likely become a standard SRO deliverable).

The PSID newsletter and contact info update were scheduled to go out end of August, so the decision was made to move release replicate 2 to beginning Sept. so it doesn't overlap with newsletter/contact "ask."

Plan is to load sample after Labor Day on Sept 6, send mailing Sept. 7. Jennie selected the sample Monday 8/22 and posted for April to review (build in a check to be sure the selection and file looks good). In Sept, Meredith, Jennie, and Jim will regression test the All Stars project in TestNext once it is migrated to the latest MSMS version.

For replicate 2 (n=100), we will do exactly what we did for rep 1 -> e.g., in sample selection, do not constrain by web preference variable, use same contact materials, etc. **with the addition of an email to be sent after letter mailed to let R know to expect the letter invite (9/12). Email to be sent to sampled Rs who have an email address.

Special Issues	Carrying a significant overrun - since before All Stars phase (phase 2 of webinizing). Remaining projections are slim - at this point we have gotten through the heavy integration work/testing with Blaise 5, MSMS and the portal. Team members necessarily spent more time than was budgeted in order to accomplish the scope. We set up a contingency account for the additional hours needed to launch and complete the All Stars pilot project, which has been a big help. At this point, it will be a matter of keeping the data requests from the PIs and PSID staff contained.

Cost
Sep 30, 2016

Total Cost to Date (Direct + Indirect):	0.00
Estimated Cost at Completion (E$AC):	0.00
Total Budget:	302,862.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	

Projections
Sep 30, 2016

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

Measures

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

Other Measures

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

Funding Agency National Institute on Aging

IRB   **HUM#:**   HUM00109415   **Period Of Approval:**   1/21/16 - 1/20/17

Project Team
- **Project Lead:** Rachel Anne LeClere
- **Budget Analyst:** William Lokers
- **Production Manager:** Derek Dubuque
- **Senior Project Advisor:** Stephanie A Chardoul
- **Production Manager:**
- **Production Manager:**

Proposal #: no data

Description: Panel Study of Income Dynamics (PSID)—Wellbeing and Daily Life Study is part of the Panel Study of Income Dynamics – a national, longitudinal study of families started in 1968. The study is the second Mixed-Mode, Web/Mail study carried out on the PSID Suite. The sample for PSID-Wellbeing and Daily Life Study is comprised of the majority of PSID respondents and spouses and includes approximately 10,784 individuals. Respondents are invited either complete an on-line or on paper. When initially invited to participate, potential respondents were assigned to the Web Group or the Choice Group, based upon analysis done of past data to predict which mode the respondents were most likely to complete. Follow-up efforts have consisted of both hard-copy and e-mailed reminders as well as non-response reminder calling. The interview content includes questions about wellbeing, personality traits, and every day skills and will allow researchers to better understand the wellbeing of America's families and how it is influenced by health, economic status, and family circumstances

SRO Project Period 10/2015 - 09/2016

Data Col Period

Security Plan NA

Milestone Dates

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

Other Project Team Members:
Rachel LeClere - Project Manager
Emily Blasczyk--Data Manager and Report Programmer
Hueichun Peng--Custom Project SMS Programmer
Donnalee Grey-Farquharson--Custom Project SMS Design/Specifications
Max Malhotra--Illume Programmer
Alexander Hernandez--Illume Programmer
Stefanie Skulsky - Project Assistant
Tony Romanowski - Materials and Training Developer

Other Project Names: PSID Web/Mail 2016
FES Wellbeing and Daily Life

Sample Mgmt Sys Web SMS

Data Col Tool Illume; SAQ

Hardware Other (R hardware)

DE Software Illume

QC Recording Tool DRI-CXM

Incentive Yes, R

   Administration ISR Group (SRC-PSID)

   Payment Type Check, post ($20); Cash, prepaid ($5)

   Payment Method Check through other system (PSID_RAPS)

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Report Period Sep, 2016 (PSID-WB)   **Project Phase**   Implementing

Risk Level	*On Track*
Monthly Update	-Continued passive data collection. We continue to enter PAPIs and check web survey completes. -PSID requested the underrun be transferred back to PSID costs. A total of $18,000 was reallocated to PSID.
Special Issues	

Cost
Aug 31, 2016

Total Cost to Date (Direct + Indirect):	628,433.49
Estimated Cost at Completion (E$AC):	675,565.06
Total Budget:	706,428.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	

Projections
Aug 31, 2016

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

Measures

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

Other Measures

Project Name	Social Networks and Well Being (SN&WB)
Project Mode	Primary: Face to Face Secondary: Telephone

Project Type	Sponsored Projects		Project Status	Current

Budget	*Direct Budget:* 516,716.00	*InDirect Budget:* 284,195.00	*Total Budget:* 800,911.00

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

Funding Agency

IRB	*HUM#:* 2015-02-0123	*Period Of Approval:* 4/15/16-4/15/17

Project Team	*Project Lead:*	Heidi Marie Guyer
	Budget Analyst:	
	Production Manager:	Kathleen S Ladronka
	Senior Project Advisor:	Kirsten Haakan Alcser
	Production Manager:	Russell W Stark
	Production Manager:	Esther H Ullman

Proposal #:	no data

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

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

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

Milestone Dates

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

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

Report Period	Sep, 2016 (SN&WB)	**Project Phase**	Initiation

Risk Level   *Some Concerns*

Monthly Update   The activities in the month have included technical developments, multiple meetings with the PIs and vendors of the various software that will be utilized on the project to collect ancillary data.   As planned the focus was on testing the various systems, especially the Blaise screener and main, finalizing the recruitment and hiring schedule and the training schedule. The training dates have been set for October, contract is signed and recruiting is completed. Final pre-production activities are underway.

Special Issues   The Technical team has been charged with development of many new systems to integrate actical set up, mEMA and EAR in addition to a relatively complex Main Blaise application. Good progress has been made however vendors still need to provide more developed applications for us to be able to fully test

Cost
Sep 30, 2016

Total Cost to Date (Direct + Indirect):	139,225.33
Estimated Cost at Completion (E$AC):	800,644.55
Total Budget:	800,911.00
Variance (Budget minus E$AC):	266.45
Reason For Variance:	Unsure actual HPI for production, will adjust as data collection is underway

Projections
Sep 30, 2016

Dollars Projected For Month:	103,890.41
Actual Dollars Used:	43,845.62
Variance (Projected minus Actual):	60,044.79
Reason For Variance:	Data collection costs had not been moved forward to later in October (when training was moved forward) so these have now been re-allocated.

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:	300		8.8
Current actual:			
Estimate at Complete:			
Variance:			

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

Project Name	Surveys of Consumer Attitudes (SCA 2016)
Project Mode	Primary: Telephone Total of Modes: 1

Project Type	Sponsored Projects		**Project Status**	Current

Budget	*Direct Budget:*	697,302.00	*InDirect Budget:*	0.00	*Total Budget:*	697,302.00

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

Funding Agency   Bloomberg, others for Riders.

IRB	*HUM#:*		*Period Of Approval:*	
Project Team	*Project Lead:*	Joseph Matthew Matuzak		
	Budget Analyst:	Dean E Stevens		
	Production Manager:			
	Senior Project Advisor:	Mary P Maher		
	Production Manager:			
	Production Manager:			

Proposal #:   no data

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

The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 500 interviews.

SRO Project Period	01/2016 - 12/2016
Data Col Period	01/2016 - 12/2016
Security Plan	NA

Milestone Dates

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

Other Project Team Members:
Dave Dybicki
Ann Munster
Kelley Popielarz
Pamela Swanson
Jennie Williams
LaVelvet Harrison

Other Project Names:

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	Sep, 2016 (SCA 2016)	**Project Phase**	Implementing

Risk Level   *Some Concerns*

Monthly Update   SCA completed its September study two days early, with a higher than targeted total and the desired split between RDD and Recon completes. In all, 580 interviews were completed, 387 RDDs and 193 Recons. This was done with an

instrument of 28.0 minutes, using 1736.9 interviewer hours and a 2.99 HPI. SCA had an extra week of data collection this month, while working around the Labor Day holiday weekend, and this made for an overall very smooth month of data collection. We had an excellent prelim result, with 416 completes, and this set up an easy end to the study month.

SCA also hired and trained additional interviewers again this month, adding seven interviewers, four of whom were new hires. It continued to integrate interviewers added in August.

Special Issues

Cost
Sep 12, 2016

Total Cost to Date (Direct + Indirect):	506,917.56
Estimated Cost at Completion (E$AC):	750,925.43
Total Budget:	697,302.00
Variance (Budget minus E$AC):	-53,623.43
Reason For Variance:	Scope has continued to change, as budget was based on 500 completes per month, and has been expanding, since March, toward 600. This has meant more interviewer hours and more hiring activity.

Projections
Sep 12, 2016

Dollars Projected For Month:	60,081.50
Actual Dollars Used:	603.35
Variance (Projected minus Actual):	0.00
Reason For Variance:	We expect to have another deficit month, since we trained another group of interviewers and had a higher goal. We currently estimate a small overrun, about $1300.

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:	570	10	2.80
Current actual:			
Estimate at Complete:	570	8	2.99
Variance:	10	-2	0.19

Other Measures

Project Name	Sustainability Cultural Indicators Program-2015 (SCIP-2015)
Project Mode	Primary: Web Total of Modes: 1
Project Type	Sponsored Projects **Project Status** Current
Budget	***Direct Budget:*** 69,535.00 ***InDirect Budget:*** 0.00 ***Total Budget:*** 69,535.00
Principal Investigator/Client	John Callewart (Graham Environmental Sustainability Institute) Robert Marans (UM-Survey Research Center)
Funding Agency	
IRB	***HUM#:*** 00068573 ***Period Of Approval:*** 6/5/2015-6/4/2016

Project Team
Project Lead:	Andrew L Hupp
Budget Analyst:	Sherri Cranson
Production Manager:	
Senior Project Advisor:	Stephanie A Chardoul
Production Manager:	
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	07/2015 - 06/2016
Data Col Period	10/2015 - 11/2015
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: 10/21/2015	***DC End:***

Other Project Team Members:	Andrew Hupp - instrument revisions/project management/methodological experimental design Mick Couper/James Wagner- methodological experimental design Sherri Cranson - financial support and analysis Hueichun Peng - e-mail tracking programming Minako Edgar - sample prep, dataset creation, GIS analysis Dan Zahs - weighting and sampling support Paul Burton - analysis Will Chan - analysis (PSM graduate students working on PI side)
Other Project Names:	Campus Sustainability
Sample Mgmt Sys	Illume
Data Col Tool	Illume
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	Sep, 2016 (SCIP-2015) **Project Phase** Closing
Risk Level	*On Track*
Monthly Update	September '16 -In September, Minako finished up work with Bob on GIS analysis. Andrew H. (Andrew H., Heather, and Andrew P.; two chapters) and Minako (Minako and Bob) both worked and submitted drafts of their chapters related to SCIP data colection for an edited volume on Sustainability being published in 2017.

To Do:
1. Finish the methods report for posting to the Graham website.
2. Continuing to analyze data (experiments, e-mail, device usage, etc.).
3. Work with research team on appending other data sources to survey data.

August '16
-In August, Minako worked with Bob on some GIS analysis and worked with the team on the datasets and rerunning one of the indices that didn't look quite right.

To Do:
1. Finish the methods report for posting to the Graham website.
2. Continuing to analyze data (experiments, e-mail, device usage, etc.).
3. Work with research team on appending other data sources to survey data.

July '16
-An SDG meeting was held to discuss the issues around skipping a year and what the design should be moving forward.
-Andrew H., Heather, and Andrew P. worked on their chapters for the book for next year's international sustainability conference to be held at ISR in May. The first chapter drafts are due in September.
-Andrew H. worked on the methods report basing it on the items to report from the AAPOR transparency initiative.
-Some of the under run has been allocated to Minako (40 hours per month July/Aug/Sept) to help with PI requests. We will use the same account and Andrew H. will monitor.
-Dan delivered the panel weights at the end of June. The team is working on the analysis of panel data now that they have the weights.

To Do:
1. Finish the methods report for posting to the Graham website.
2. Continuing to analyze data (experiments, e-mail, device usage, etc.).
3. Work with research team on appending other data sources to survey data.

June '16
-Andrew H., Minako and Dan met with the PIs to discuss the design going forward (no data collection is planned for Fall 2016. A series of items were discussed. An SDG meeting has been scheduled for July to discuss the issues around skipping a year and what the design should be moving forward.
-Andrew H., Heather, and Andrew P. submitted two methodological abstracts (based on AAPOR and IFDTC presentations) that were accepted for an international sustainability conference to be held at ISR next May. They were accepted. The papers will be chapters in a book to come out just after the conference. The first chapter drafts are due in September.
-Minako submitted a poster (with Bob) related to the work they have been doing with GIS and travel.
-Andrew H. worked on the methods report basing it on the items to report from the AAPOR transparency initiative.
-There is some undone analysis work on the PI side to prepare the report for the university. This wave of SCIP currently has ~$13,000 under run. Some of that under run has been allocated to some time for Minako (40 hours per month July/Aug/Sept) for the rest of the summer to help with PI requests. We will use the same account and Andrew H. will monitor.
-Dan is to deliver the panel weights by the end of the month.

To Do:
1. Finish the methods report for posting to the Graham website.
2. Continuing to analyze data (experiments, e-mail, device usage, etc.).
3. Work with research team on appending other data sources to survey data.
4. Panel sample weights (Dan Z.)

May '16
Work in May included:
-Andrew H., Minako and Dan met with the PIs to discuss the design going forward (no data collection is planned for Fall 2016. A series of items were discussed. An SDG meeting has been scheduled for July to discuss the issues around skipping a year and what the design should be moving forward.
-Andrew H., Will, Heather, and Andrew P. (PSM student) conducted the first set of methodological analysis from the 2014 and 2015 surveys and presented finding at AAPOR and IFDTC.
-Andrew H. worked on the methods report basing it on the items to report from the AAPOR transparency initiative.
-Andrew H. and Minako were asked to submit abstracts for an international sustainability conference to be held at ISR next May. Andrew H., Heather and Andrew P., worked on a set of methodological abstracts.

To Do:

1. Finish the methods report for posting to the Graham website in June.
2. Continuing to analyze data (experiments, e-mail, device usage, etc.).
3. Work with research team on appending other data sources to survey data.
4. Panel sample weights (Dan Z.)

April '16
Work in April included:
-Andrew and Minako continue to meet with the PIs regularly.
-Andrew H., Will, Heather, and Andrew P. (PSM student) are working on methodological analysis from the 2014 and 2015 surveys (AAPOR and IFDTC abstracts were accepted).
-Andrew H. worked on the methods report basing it on the items to report from the AAPOR transparency initiative.
-Minako discovered an issue with a new question programmed in the 2015 survey. It was similar to a question in prior years. The similar question also remained in the survey. During programming the new question was programmed using the original variable names and the previous question was assigned new variable names by mistake. The variables were renamed in the 2015 dataset to be consistent with prior years.
-Andrew revised the questionnaires to fix the above variable naming issue and provided to the PI to post on the Graham website.

To Do:
1. Continue writing the full 2014 methods report, adding in the 2015 data. This includes rewriting the previous years into a comprehensive report that has information on each of the years (with tables for comparisons) rather than a separate report each year.
2. Continuing to analyze data (experiments, e-mail, device usage, etc.).
3. Work with research team on appending other data sources to survey data.
4. Panel sample weights (Dan Z.)

March '16
Work in March included:
-Andrew and Minako continue to meet with the PIs regularly.
-Andrew H., Will, Heather, and Andrew P. (PSM student) are working on methodological analysis from the 2014 and 2015 surveys (AAPOR and IFDTC abstracts were accepted).
-Andrew H. worked on the methods report basing it on the items to report from the AAPOR transparency initiative.
-Minako discovered an issue with a new question programmed in the 2015 survey. It was similar to a question in prior years. The similar question also remained in the survey. During programming the new question was programmed using the original variable names and the previous question was assigned new variable names by mistake. The variables were renamed in the 2015 dataset to be consistent with prior years.

To Do:
1. Continue writing the full 2014 methods report, adding in the 2015 data. This includes rewriting the previous years into a comprehensive report that has information on each of the years (with tables for comparisons) rather than a separate report each year.
2. Continuing to analyze data (experiments, e-mail, device usage, etc.).
3. Work with research team on appending other data sources to survey data.
4. Panel sample weights (Dan Z.)

February '16
Work in February included:
-Andrew and Minako continue to meet with the PIs regularly.
-Andrew H., Will, Heather, and Andrew P. (PSM student) are working on methodological analysis from the 2014 and 2015 surveys (AAPOR and IFDTC abstracts were accepted).
-Dan provided weights for the cross-section cases.
-Andrew H. notified winners
-Andrew H. reconciled the imprest cash account.
-Andrew H. created a crosswalk of questions asked each year (2012, 2013, 2014, 2015) by instrument (Faculty/Staff cross-section, Student cross-section, Student panel)

To Do:
1. Continue writing the full 2014 methods report, adding in the 2015 data. This includes rewriting the previous years into a comprehensive report that has information on each of the years (with tables for comparisons) rather than a separate report each year.
2. Continuing to analyze data (experiments, e-mail, device usage, etc.).
3. Work with research team on appending other data sources to survey data.
4. Panel sample weights (Dan Z.)

January '16
Work in January included:
-Andrew and Minako continue to meet with the PIs regularly.
-Andrew, and Will (PSM student) are working on methodological analysis from the 2014 and 2015 surveys (an AAPOR abstract was accepted, and a IFDTC abstract was submitted).
--An imprest request was made and picked up. The money was used to purchase Visa gift cards at the UM Credit Union. Those cards were in turn, used to purchase gift codes from Amazon.
--Minako created the file of cases (those who said "yes" to be willing to have the token and either submitted their survey (DATSTATPCTCOMPLETE=100 or those cases that were taken as partials (DATSTATPCTUNANSWERED <=20).
-Numbers were randomly generated to select gift code winners.

To do:
1. Continue writing the full 2014 methods report, adding in the 2015 data. This includes rewriting the previous years into a comprehensive report that has information on each of the years (with tables for comparisons) rather than a separate report each year.
2. Continuing to analyze data (experiments, e-mail, device usage, etc.).
3. Work with research team on appending other data sources to survey data.
4. Sample weights (Dan Z.)
5. Notify raffle winners.
6. Reconcile imprest cash account.

December '15
Work in December included:
-Andrew and Minako continue to meet with the PIs regularly.
-Andrew, and Will (PSM student) are working on methodological analysis from the 2014 survey.
-Data collection concluded December 7th. Data collection was extended for three groups who have not yet met their targets (freshman, juniors, and the panel (about 200 interviews short)). All other groups (faculty, staff, sophomores, seniors and grad students) have met their goal. RRs across the board are down from the prior year (faculty/staff ~2%, fr ~7%, so ~4%, jr ~5%, sr ~3%, grad ~8%, panel ~10%).
-An imprest cash account was set-up.
-Numbers were randomly generated to select gift code winners.

To do:
1. Continue writing the full 2014 methods report, adding in the 2015 data. This includes rewriting the previous years into a comprehensive report that has information on each of the years (with tables for comparisons) rather than a separate report each year.
2. Continuing to analyze data (experiments, e-mail, device usage, etc.).
3. Work with research team on appending other data sources to survey data.
4. Sample weights (Dan Z.)
5. Purchase gift codes.
6. Notify raffle winners.
7. Reconcile imprest cash account.

November '15
Work in November included:
-Andrew and Minako continue to meet with the PIs regularly.
-Andrew, and Will (PSM student) are working on methodological analysis from the 2014 survey.
-Andrew updated the preload file and Reminder 3 email job (with help from Hueichun) to accommodate the video reminder for a random half of the sample.
-Andrew created and shared an updated data collection timeline/plan.
-A meeting was held with the visitor from Turkey and the researcher from SNRE.
-The President help a sustainability town hall meeting at Hatcher Graduate Library. SCIP was one of the topics.
-Data collection continued through the month of November. Data collection was extended for three groups who have not yet met their targets (freshman, juniors, and the panel (about 200 interviews short)). All other groups (faculty, staff, sophomores, seniors and grad students) have met their goal. RRs across the board are down from the prior year (faculty/staff ~2%, fr ~7%, so ~4%, jr ~5%, sr ~3%, grad ~8%, panel ~10%).
-An AAPOR abstract was written and submitted regarding experiments carried out on SCIP.
-An IFDTC abstract using SCIP data has been submitted to SRO.

To do:
1. Continue writing the full 2014 methods report, adding in the 2015 data. This includes rewriting the previous years into a comprehensive report that has information on each of the years (with tables for comparisons) rather than a separate report each year.
2. Continuing to analyze data (experiments, e-mail, device usage, etc.).

3. Work with research team on appending other data sources to survey data.
4. Sample weights (Dan Z.)

October '15
Work in October included:
-Andrew and Minako continue to meet with the PIs regularly. This month the meeting focused on the upcoming plan for this fall's data collection and a visit from a scholar in November.
-Andrew, Paul B., and Will (PSM student) are working on methodological analysis from the 2014 survey.
-Andrew created (and John submitted) a second IRB amendment for fall data collection (minor questionnaire revisions).
-Andrew programmed and tested (along with the PIs) the updated datamodels.
-Minako created the preload files.
-Andrew uploaded the preload files and published the surveys.
-Andrew created and shared data collection timeline/plan.
-A researcher from SNRE is interested in the survey results for a class. She has signed an ISR Pledge of Confidentiality (Andrew has). She will join the team at the meeting with the visitor from Turkey to become more familiar with the project.
-Data collection began on 10/26.

To do:
1. Continue writing the full 2014 methods report. This includes rewriting the previous years into a comprehensive report that has information on each of the years (with tables for comparisons) rather than a separate report each year.
2. Continuing to analyze data (experiments, e-mail, device usage, etc.).
3. Work with research team on appending other data sources to survey data.
4. Prepare for meeting with visitor from Turkey.

September '15
Work in September included:
-Andrew and Minako continue to meet with the PIs regularly. This month the meeting focused on the upcoming plan for this fall's data collection and a visit from a scholar in November.
-Andrew and Paul B. are working on methodological analysis from the 2014 survey, Will (an PSM student) has time and will be assisting in October.
-Andrew created (and John submitted) the IRB amendment for fall data collection.
-We received the video from the U-M's head women's basketball coach to be used in one of the reminders.

To do:
1. Continue writing the full 2014 methods report. This includes rewriting the previous years into a comprehensive report that has information on each of the years (with tables for comparisons) rather than a separate report each year.
2. Continuing to analyze data (experiments, e-mail, device usage, etc.).
3. Work with research team on appending other data sources to survey data.
4. IRB amendment for questionnaire revision
5. Programming changes and testing of 2015 survey
6. Create data collection schedule

Aug. '15
Work in August included:
-Andrew and Minako continue to meet with the PIs regularly. This month the meeting focused on revisions to the questionnaire for the Fall 2015 survey and about the 2014 report to the university.
-Minako continues to do analysis for Bob.
-Andrew and Paul B. are working on methodological analysis from the 2014 survey.
-Andrew provided a methodological summary for the report to the university.

To do:
1. Continue writing the full 2014 methods report. This includes rewriting the previous years into a comprehensive report that has information on each of the years (with tables for comparisons) rather than a separate report each year.
2. Analyze data (experiments, e-mail, device usage, etc.).
3. Work with research team on appending other data sources to survey data.
4. IRB amendment for the Fall 2015 survey
5. Video of women's basketball coach
6. Programming changes and testing of 2015 survey

July '15
Work in July included:
-Andrew and Minako continue to meet with the PIs regularly. This month the meeting focused on revisions to the questionnaire for the Fall 2015 survey.

-Minako continues to do some analysis for Bob.
-Andrew and Paul B. are working on methodological analysis from the 2014 survey.

To do:
1. Produce final datasets once all weights have been created and values recoded.
2. Continue writing 2014 methods report. This includes rewriting the previous years into a comprehensive report that has information on each of the years (with tables for comparisons) rather than a separate report each year.
3. Analyze data (experiments, e-mail, device usage, etc.).
4. Work with research team on appending other data sources to survey data.
5. IRB amendment for the Fall 2015 survey

Special Issues

Cost
Oct 31, 2016

Total Cost to Date (Direct + Indirect):	58,113.40
Estimated Cost at Completion (E$AC):	59,977.11
Total Budget:	69,535.00
Variance (Budget minus E$AC):	9,557.89
Reason For Variance:	Unused data manager hours accounted for the underrun in April. There is an open discussion with the PI about using the unused funds for some analysis in the next fiscal year.

Projections
Oct 31, 2016

Dollars Projected For Month:	1,863.71
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	July '16 - We've allocated 120 hours ($14,938) of the under run (40 hours a month for August, September, and October) for Minako to do some work with Bob and John. Andrew H. will continue to monitor the costs those months.

June '16 - End FY16 with an under run. Minako is still doing work for the PIs (40/mo projected for July-Sept). We are not conducting a survey. Data collection will resume in the Fall of 2017.

April '16 - Unused projections moved forward.

March '16 - Unused projections were moved forward.

February '16 - Unused projections were moved forward.

January '16 - The reason for the large difference, is the incentives were projected in January. Those projections are being moved forward.

December '15 - Unused data analyst hours. This will be needed and moved forward.

November '15 - Unused data analyst hours. This will be needed and moved forward.

October '15- Unused project manager hours and data analyst hours due to other projects. Unused moved forward.

August '15 - Unused project manager hours and data analyst hours due to other projects and vacations. Unused moved forward.

July '15 - Unused project manager hours due to other projects. Moved forward.

Measures

	Units Complete	RR	HPI
Current Goal:	6,386	30%	NA
Goal at Completion:			NA
Current actual:	5,430	26%	NA
Estimate at Complete:			NA
Variance:			NA

Other Measures