

Survey Research Operations

Monthly Project Report

Sponsored Projects

September 2017



Sponsored Projects

(ABCD) Adolescent Brain Cognitive Development
(A-STARRS LS) Army Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study
(CogEcon Web) CogEcon 2016 Web
(DMACS) Detroit Metropolitan Area Survey
(HCAP 2016) Harmonized Cognitive Assessment Protocol
(HRS 2016) Health and Retirement Study
(HCDC, H&C) Housing & Children
(CAMS 2017) HRS 2017 Consumption and Activity Mail Study
(MTTS) Mathematics Teachers & Teaching Study
(MTF Illume Web 2017) Monitoring the Future Web Programming and Survey Pilot
(NSFG 2010-2020) National Survey of Family Growth
(AHRB) Neurodevelopmental Pathways in Adolescent Health Risk Behavior
(YRS) Optimizing Youth Suicide Risk Screening and Triage In the Emergency Department
(PSID TAS 2017) Panel Study of Income Dynamics - Transition to Adulthood Study 2017
(PSID-Imm) PSID Immigrant Refresher Screening Project
(SWEL) Stress and Wellbeing in Everyday Life
(SCA 2017) Surveys of Consumer Attitudes
(SCIP-2017) Sustainability Cultural Indicators Program-2017

Project Name	Adolescent Brain Cognitive Development (ABCD)												
Project Mode	Primary: Mixed	Secondary: Mixed	Total of Modes: 2										
Project Type	Sponsored Projects		Project Status Current										
Budget	Direct Budget: 277,805.00	Indirect Budget: 0.00	Total Budget: 430,596.00										
Principal Investigator/Client	Mary Heitzeg (UM Dept of Psychiatry)												
Funding Agency	NIH												
IRB	HUM#: HUM00106316	Period Of Approval:	9/10/2015-1/7/2017										
Project Team	Project Lead: Karin Schneider Budget Analyst: Janelle P Cramer Production Manager: _UnAssigned Senior Project Advisor: Stephanie A Chardoul Production Manager: _UnAssigned Production Manager: _UnAssigned												
Proposal #:	no data												
Description:	<p>ABCD is a longitudinal study of about 10,000 children from ages 9-10 through early adulthood to assess factors that influence individual brain development trajectories and functional outcomes. UM Dept of Psychiatry is one of 19 research sites across the country.</p> <p>Sampling statisticians from our Stat and Methods Unit identified all public and private schools with children aged 9-10 within the geographic catchment area for each site. This activity was under a separate contract and the initial selection of four replicates has been distributed to all research sites. SRO received an electronic data file listing all selected schools in the UM catchment area.</p> <p>SRO will target the recruitment of 54 schools from Michigan, who will consent to distribute recruitment letters to parents for participation in the ABCD study. Respondent contact information will be returned directly to the Michigan research team for additional activities, including screening for eligibility. (Parents return cards with their contact information directly to the PI's staff.)</p>												
SRO Project Period	05/2016 - 03/2018												
Data Col Period	05/2016 - 02/2018												
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start: 05/15/2016</td> <td style="padding: 5px;">Pretest Start:</td> </tr> <tr> <td style="padding: 5px;">Pretest End:</td> <td style="padding: 5px;">Recruitment Start: 05/20/2016</td> </tr> <tr> <td style="padding: 5px;">Staffing Completed: 05/20/2016</td> <td style="padding: 5px;">GIT Start:</td> </tr> <tr> <td style="padding: 5px;">SS Train Start:</td> <td style="padding: 5px;">SS Train End:</td> </tr> <tr> <td style="padding: 5px;">DC Start: 05/20/2016</td> <td style="padding: 5px;">DC End: 02/28/2018</td> </tr> </table>			PreProduction Start: 05/15/2016	Pretest Start:	Pretest End:	Recruitment Start: 05/20/2016	Staffing Completed: 05/20/2016	GIT Start:	SS Train Start:	SS Train End:	DC Start: 05/20/2016	DC End: 02/28/2018
PreProduction Start: 05/15/2016	Pretest Start:												
Pretest End:	Recruitment Start: 05/20/2016												
Staffing Completed: 05/20/2016	GIT Start:												
SS Train Start:	SS Train End:												
DC Start: 05/20/2016	DC End: 02/28/2018												
Other Project Team Members:													
Other Project Names:	Adolescent Brain Cognitive Development												
Sample Mgmt Sys	NA												
Data Col Tool	NA												
Hardware	NA												
DE Software	NA												
QC Recording Tool	NA												
Incentive	NA												
Administration	NA												
Payment Type	NA												
Payment Method	NA												

Report Period	Sep, 2017 (ABCD)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	New district participating (4 new schools).		

Special Issues NONE

Cost
Sep 25, 2017

<i>Total Cost to Date (Direct + Indirect):</i>	173,088.00
<i>Estimated Cost at Completion (E\$AC):</i>	430,596.00
<i>Total Budget:</i>	430,596.00
<i>Variance (Budget minus E\$AC):</i>	0.00
<i>Reason For Variance:</i>	

Projections
Sep 25, 2017

<i>Dollars Projected For Month:</i>	5,000.00
<i>Actual Dollars Used:</i>	8,000.00
<i>Variance (Projected minus Actual):</i>	0.00
<i>Reason For Variance:</i>	Ramped up our activity now that schools are open and willing to send parent packets

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

Other Measures

Project Name	Army Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study (A-STARRS LS)																								
Project Mode	Primary: Web		Secondary: Telephone	Total of Modes: 3																					
Project Type	Sponsored Projects			Project Status	Current																				
Budget	Direct Budget:	8,218,215.00	Indirect Budget:	4,520,018.00	Total Budget: 12,738,233.00																				
Principal Investigator/Client	James Wagner (University of Michigan) Robert Ursano (Uniformed Services University of the Health Scienc) Murray Stein (University of California San Diego)																								
Funding Agency	Department of Defense																								
IRB	HUM#:	HUM00099203	Period Of Approval:	2/18/2016-2/17/2017																					
Project Team	Project Lead:	Nancy J Gebler																							
	Budget Analyst:	William Lokers																							
	Production Manager:	Ruth B Philippou																							
	Senior Project Advisor:	Mary P Maher																							
	Production Manager:	Meredith A House																							
	Production Manager:	Margaret Lee Hudson																							
Proposal #:	no data																								
Description:	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	<table><tr><td>PreProduction Start:</td><td>02/01/2015</td><td>Pretest Start:</td><td>10/14/2015</td></tr><tr><td>Pretest End:</td><td>03/31/2016</td><td>Recruitment Start:</td><td></td></tr><tr><td>Staffing Completed:</td><td></td><td>GIT Start:</td><td></td></tr><tr><td>SS Train Start:</td><td></td><td>SS Train End:</td><td></td></tr><tr><td>DC Start:</td><td>09/12/2016</td><td>DC End:</td><td>09/30/2019</td></tr></table>					PreProduction Start:	02/01/2015	Pretest Start:	10/14/2015	Pretest End:	03/31/2016	Recruitment Start:		Staffing Completed:		GIT Start:		SS Train Start:		SS Train End:		DC Start:	09/12/2016	DC End:	09/30/2019
PreProduction Start:	02/01/2015	Pretest Start:	10/14/2015																						
Pretest End:	03/31/2016	Recruitment Start:																							
Staffing Completed:		GIT Start:																							
SS Train Start:		SS Train End:																							
DC Start:	09/12/2016	DC End:	09/30/2019																						
Other Project Team Members:	Andrew Hupp, Heather Schroeder, Leah Roberts, Ryan Yoder, Andrew Piskowrowski, Lisa Lewandowski-Romps, Lamont Manley, Emily Blaczyk, Genise Pattulo, Derek Dubuque, Keith Liebetreu																								
Other Project Names:																									
Sample Mgmt Sys	MSMS																								
Data Col Tool	Blaise 5																								
Hardware	Desktop																								
DE Software	N/A																								
QC Recording Tool	Live monitoring																								
Incentive	Yes, R																								
Administration	SRO Group																								
Payment Type	Check, post (\$50-\$100); Cash, prepaid (\$2 (or Challenge coin)); Other (Army STARRS challenge coin (provide																								
Payment Method	Check through other system (MSMS); Imprest Cash Fund from ISR Business Office (MSMS); Other (Army STA																								

Report Period	Sep, 2017 (A-STARRS LS)	Project Phase	Implementing
Risk Level	Some Concerns		
Monthly Update	<p>Below is a summary of activities for this month. The full report is uploaded as a separate file for those needing additional detail. <input type="checkbox"/> Production data collection continues. We released sample replicates 25 and 26 this month, bringing the total number of released sample lines to 43,115.</p> <p><input type="checkbox"/> A total of 11,029 main Wave 1 interviews and 249 Phase 5 (end game) interviews have been completed as of September 28. Production updates are being provided weekly to the research team via email, and a summary of data</p>		

collection results is included in this report.

- We continued working on plans for Wave 2 data collection. We received the questionnaire from Harvard and have begun programming. The sample and contact protocol have been determined, and we are working on preparing documentation and updating our systems for an anticipated Wave 2 start in late March.
- We submitted additional questions and received answers for the design of a new study that will refresh the STARRS sample by recruiting and interviewing new Soldiers coming into the Army. We are working on updating cost estimates.
- Enclave user support continues. The completion date for the replacement server on the Enclave has been pushed back to next month.

Special Issues

Areas of Risk, Mitigation Strategies:

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

- Respondent contact and participation.
 - o We were informed this month that the Army has received a favorable ruling for their request to provide us with address updates from the IRS system. They are now working on preparing the request paperwork. This comes a bit late in the study to do a lot of good for our Wave 1 data collection, but it is still welcome news. We are requesting address updates for the entire STARRS-LS sample once per year.
 - o We are using fairly optimistic response rate assumptions for Wave 2. The address updates will be helpful in ensuring that we contact as many individuals as possible for Wave 2.
- New technical systems.
 - o Our technical systems are performing well overall, although we continue to experience issues that require careful monitoring.
 - o The upgrade of the Wave 2 survey instrument to the latest version of the Blaise data collection software is going well.
 - o We have also decided to keep the contact protocol for Wave 2 the same as we have for Wave 1, with only minor adjustments. This will be helpful in keeping costs down.
- Addition of public use datasets.
 - o We are waiting for Army and PI decisions on which Army STARRS datasets will be made available to the wider research community. Once the decisions are made, we will need to evaluate the impact this will have on our staffing and costs, and will prepare budgets and timelines for these activities.

Cost Sep 12, 2017

Total Cost to Date (Direct + Indirect):	6,087,931.00
Estimated Cost at Completion (E\$AC):	12,648,863.00
Total Budget:	12,738,233.00
Variance (Budget minus E\$AC):	89,370.00
Reason For Variance:	We continue to adjust our costs each month, to reflect staffing and non-salary changes. This variance is less than 1% of the total five year budget. We will make adjustments in future months to ensure that we end the project with as close to a zero variance as possible.

Projections Sep 12, 2017

Dollars Projected For Month:	295,494.00
Actual Dollars Used:	294,817.00
Variance (Projected minus Actual):	677.00
Reason For Variance:	The variance is less than 0.5%.

Measures

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

Other Measures

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

Project Name CogEcon 2016 Web (CogEcon Web)

Project Mode Primary: Web Total of Modes: 1

Project Type Sponsored Projects **Project Status** Current

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

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

Funding Agency

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

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

Proposal #: no data

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

SRO Project Period 07/2017 - 01/2018

Data Col Period 10/2017 - 01/2018

Security Plan NA

Milestone Dates

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

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

Other Project Names: CogEcon 2017 Web

Sample Mgmt Sys Illume

Data Col Tool Illume

Hardware NA

DE Software Illume

QC Recording Tool N/A

Incentive Yes, R

Administration SRO Group

Payment Type Check, post (variable)

Payment Method Check through other system (Illume)

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

Risk Level Not Rated

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

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

Cost
Sep 30, 2017

<i>Total Cost to Date (Direct + Indirect):</i>	16,443.96
<i>Estimated Cost at Completion (E\$AC):</i>	103,962.38
<i>Total Budget:</i>	106,552.00
<i>Variance (Budget minus E\$AC):</i>	2,590.62
<i>Reason For Variance:</i>	

Projections
Sep 30, 2017

<i>Dollars Projected For Month:</i>	18,501.32
<i>Actual Dollars Used:</i>	12,511.16
<i>Variance (Projected minus Actual):</i>	5,990.16
<i>Reason For Variance:</i>	some programming hours are being moved forward for additional changes still underway

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

Other Measures

Project Name	Detroit Metropolitan Area Survey (DMACS)													
Project Mode	Primary: Mixed													
Project Type	Sponsored Projects		Project Status	Current										
Budget	Direct Budget:	233,426.00	Indirect Budget:	23,343.00										
			Total Budget:	256,769.00										
Principal Investigator/Client	Jeff Morenoff (Population Studies) Elisabeth Gerber													
Funding Agency	Kresge Foundation													
IRB	HUM#:	00112364	Period Of Approval:	2/25/2017										
Project Team	Project Lead: Joseph Matthew Matuzak Budget Analyst: Dean E Stevens Production Manager: Bridgitte Wyche McGee Senior Project Advisor: Kirsten Haakan Alcser Production Manager: Joseph Matthew Matuzak Production Manager: Bridgitte Wyche McGee													
Proposal #:	no data													
Description:	<p>The Detroit Metropolitan Area Communities Study (DMACS) seeks to provide an information and innovation platform for conducting research and supporting evidence-based decisions about community investments and public policy. DMACS will be built around a representative web-based panel survey of adult residents of the four-county Metro Detroit region of Southeast Michigan, including Macomb, Oakland, Washtenaw and Wayne Counties, and the City of Detroit. Panel members are to be drawn from diverse communities and will reflect the region's full range of population characteristics, including respondents from traditionally underserved and/or underrepresented groups such as: people with low incomes, education or literacy; those with physical or cognitive disabilities; recent migrants; the elderly; and young adults. When fully implemented, the survey sample will include approximately 2,000 adult residents, selected and recruited based on best scientific practices (ie a probability sample), including representative subsamples of approximately 1,000 Detroit residents and 1,000 adults living throughout the metropolitan area. It is envisioned that panel members will complete a 15-20 minute web-based survey each quarter (i.e., four per year) plus additional short surveys as situations and opportunities arise. The core content on the quarterly DMACS surveys will include questions that ask citizens to prioritize the needs of their community and aspects they would most like to see change (e.g., with regard to crime, business development, jobs, education, housing, transportation, health care, and the environment). It will also monitor trends in citizens' views of changes to their community and the wider region, which groups are benefitting (or being hurt) the most from those changes, views on inequality and its sources and consequences, and the degree of civic engagement in local communities. This core content will provide a clear, nuanced and unprecedented portrait of the people and communities that make up our changing region.</p> <p>DMACS will also provide the infrastructure to allow shorter surveys on specific questions as they arise, as well as to investigate in greater depth specific issues that affect a particular neighborhood, municipality or portion of the region. In the case of short topical surveys, the web-based survey platform, coupled with a pre-existing panel of survey respondents, means that the study team can put surveys in the field almost immediately, without each time incurring the financial and time-related costs of recruiting and training a whole new sample, training interviewers, and collecting background information on respondents; this work is completed when the panel is initiated. In the case of community deep-dives, we can recruit an "oversample" of participants from a specific geographic area into the panel and use the web platform to administer specialized questionnaires. DMACS also plans to identify audio-visual materials, such as maps, video clips and other items, to gather information. In all cases, DMACS' design will allow the study team to merge detailed information about the survey respondent's local social, economic, physical and political context.</p>													
SRO Project Period	04/2016 - 02/2017													
Data Col Period	07/2016 - 03/2017													
Security Plan	NA													
Milestone Dates	<table border="1" style="width: 100%;"> <tr> <td>PreProduction Start: 04/01/2016</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start: 07/01/2016</td> </tr> <tr> <td>Staffing Completed:</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start: 10/17/2016</td> <td>SS Train End:</td> </tr> <tr> <td>DC Start: 10/03/2016</td> <td>DC End: 07/31/2017</td> </tr> </table>				PreProduction Start: 04/01/2016	Pretest Start:	Pretest End:	Recruitment Start: 07/01/2016	Staffing Completed:	GIT Start:	SS Train Start: 10/17/2016	SS Train End:	DC Start: 10/03/2016	DC End: 07/31/2017
PreProduction Start: 04/01/2016	Pretest Start:													
Pretest End:	Recruitment Start: 07/01/2016													
Staffing Completed:	GIT Start:													
SS Train Start: 10/17/2016	SS Train End:													
DC Start: 10/03/2016	DC End: 07/31/2017													
Other Project Team Members:	Joe Matuzak - Project Manager; Dan Zahs - Sampling; Sue Hodge - SSA; Kirsten Alcser - SPA; Paul Schultz - programmer; Brad Goodwin - data manager; J. Smith - Surveytrak programmer.													

Other Project**Names:**

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

Report Period Sep, 2017 (DMACS) **Project Phase** Closing
Risk Level Some Concerns
Monthly Update Data collection and delivery is complete on DMACS. Final reports are nearing completion.

Special Issues

Cost
Sep 30, 2017

Total Cost to Date (Direct + Indirect):	288,647.90
Estimated Cost at Completion (E\$AC):	274,431.71
Total Budget:	256,769.00
Variance (Budget minus E\$AC):	-17,662.71
Reason For Variance:	The cost estimate projects an overrun, due to inadvertent under-budgeting of interviewer hours and other expenses. This overrun has been reviewed by SRC, and will continue to be carefully monitored as the project progresses. The expected overrun was estimated to be \$17,000, but we have also added Illume costs, which were not budgeted at the time the project began.

Projections
Sep 30, 2017

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	Data collection costs were pushed forward since the project continues to operate on an extended timeline.

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

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

Project Name	Harmonized Cognitive Assessment Protocol (HCAP 2016)													
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 2											
Project Type	Sponsored Projects		Project Status	Current										
Budget	Direct Budget:	3,291,705.00	Indirect Budget:	1,185,014.00										
			Total Budget:	4,476,719.00										
Principal Investigator/Client	David Weir (SRC-ISR) Ken Langa (SRC-ISR) Lindsay Ryan (SRC-ISR)													
Funding Agency														
IRB	HUM#:	HUM00099822	Period Of Approval:	3/17/2015 - 3/16/201										
Project Team	Project Lead:	Evanthia Leissou												
	Budget Analyst:	Richard Warren Krause												
	Production Manager:	Dianne G Casey												
	Senior Project Advisor:	Mary P Maher												
	Production Manager:	Donnalee Ann Grey-Farquharson												
	Production Manager:	Anthony Romanowski												
Proposal #:	no data													
Description:	<p>This project will involve the completion of a face-to-face CAPI interview, designed to provide a dementia assessment of HRS respondents. A sample of 5000 respondents (one per household) who are 65 years of age or older will be selected for this effort. The questionnaire will be administered to respondents after the HRS 2016 interview has been completed. The sample will not be clustered geographically; it will be selected randomly. It is expected that the field team will carry out well-planned regional trips in order to complete the 3000 in-person interviews. An informant interview will also be completed for each of the respondents interviewed.</p> <p>The respondent questionnaire length is expected to be 60 minutes. The informant questionnaire is expected to be 20 minutes and can be administered by telephone when the interviewer calls to set up an appointment with the respondent for the face-to-face interview.</p>													
SRO Project Period	01/2015 - 12/2017													
Data Col Period	05/2016 - 02/2017													
Security Plan	NA													
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start:</td> <td style="padding: 5px;">Pretest Start:</td> </tr> <tr> <td style="padding: 5px;">Pretest End:</td> <td style="padding: 5px;">Recruitment Start:</td> </tr> <tr> <td style="padding: 5px;">Staffing Completed:</td> <td style="padding: 5px;">GIT Start:</td> </tr> <tr> <td style="padding: 5px;">SS Train Start:</td> <td style="padding: 5px;">SS Train End:</td> </tr> <tr> <td style="padding: 5px;">DC Start:</td> <td style="padding: 5px;">DC End:</td> </tr> </table>				PreProduction Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
PreProduction Start:	Pretest Start:													
Pretest End:	Recruitment Start:													
Staffing Completed:	GIT Start:													
SS Train Start:	SS Train End:													
DC Start:	DC End:													
Other Project Team Members:	Applications Programmers: Jeff Smith (STrak), Holly Ackerman (Webtrak, Weblog) CAI Programmer: Jim Hagerman Data Manager: Brad Goodwin Help Desk: Deb Wilson													
Other Project Names:														
Sample Mgmt Sys	SurveyTrak													
Data Col Tool	Blaise 4.8													
Hardware	Laptop; [UM cell] Phone; Paper and Pencil													
DE Software	Excel													
QC Recording Tool	DRI-CARI; Camtasia													
Incentive	Yes, R; Yes, INF													
Administration	NA													
Payment Type	Check, prepaid (\$50); Check, post (\$25)													
Payment Method	Check through STrak RPay System													

Report Period	Sep, 2017 (HCAP 2016)	Project Phase	Implementing
Risk Level	Some Concerns		
Monthly Update	As of September 24th, there are 3,339 completed respondent interviews and another 3,160 informant interviews.		
	Current Response/Completion Rates		

Sample	Response Rate	Completion Rate
Priority Sample	63%	96.7%
Total Sample (all)	75%	98%

Special Issues**Cost
Sep 30, 2017**

Total Cost to Date (Direct + Indirect):	4,658,964.28
Estimated Cost at Completion (E\$AC):	4,700,048.17
Total Budget:	4,476,719.00
Variance (Budget minus E\$AC):	-223,326.17
Reason For Variance:	

Several workscope changes have been implemented including additional cognitive tests for the Respondent interview, length of interviewer training, interviewer retention bonus, project management staff hours, and respondent incentives.

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

**Projections
Sep 30, 2017**

Dollars Projected For Month:	87,328.09
Actual Dollars Used:	79,832.00
Variance (Projected minus Actual):	7,496.09
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:	27,772,567.27	Indirect Budget:	9,998,123.36	Total Budget: 37,770,690.63																				
Principal Investigator/Client	David Weir (SRC) Mary Beth Ofstedal (SRC) Ken Langa (SRC)																								
Funding Agency	NIA																								
IRB	HUM#:	HUM00061128	Period Of Approval:	1/15/2015 - 1/14/201																					
Project Team	Project Lead:	Nicole G Kirgis																							
	Budget Analyst:	Richard Warren Krause																							
	Production Manager:	Stephanie Sullivan																							
	Senior Project Advisor:	Mary P Maher																							
	Production Manager:	Jennifer C Arrieta																							
	Production Manager:	Piotr Dworak																							
Proposal #:	no data																								
Description:	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort will be added. A series of physical measures and biomarkers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records and Veterans Administration (VA) records is requested.																								
SRO Project Period	04/2015 - 06/2017																								
Data Col Period	02/2016 - 04/2017																								
Security Plan	NA																								
Milestone Dates	<table><tr><td>PreProduction Start:</td><td>04/01/2015</td><td>Pretest Start:</td><td>10/16/2015</td></tr><tr><td>Pretest End:</td><td>11/07/2015</td><td>Recruitment Start:</td><td>06/01/2015</td></tr><tr><td>Staffing Completed:</td><td>03/15/2016</td><td>GIT Start:</td><td>02/10/2016</td></tr><tr><td>SS Train Start:</td><td>02/12/2016</td><td>SS Train End:</td><td>04/24/2016</td></tr><tr><td>DC Start:</td><td>02/22/2016</td><td>DC End:</td><td>04/29/2017</td></tr></table>					PreProduction Start:	04/01/2015	Pretest Start:	10/16/2015	Pretest End:	11/07/2015	Recruitment Start:	06/01/2015	Staffing Completed:	03/15/2016	GIT Start:	02/10/2016	SS Train Start:	02/12/2016	SS Train End:	04/24/2016	DC Start:	02/22/2016	DC End:	04/29/2017
PreProduction Start:	04/01/2015	Pretest Start:	10/16/2015																						
Pretest End:	11/07/2015	Recruitment Start:	06/01/2015																						
Staffing Completed:	03/15/2016	GIT Start:	02/10/2016																						
SS Train Start:	02/12/2016	SS Train End:	04/24/2016																						
DC Start:	02/22/2016	DC End:	04/29/2017																						
Other Project Team Members:	Rebecca Gatward (Survey Director), Sharon Parker (Production Management Coordinator), Frost Hubbard (New Cohort), Jennifer Kelley (Respondent Contact Coordinator), Jaime Koopman (Project Manager), Russ Stark (SSL Production Manager), Ian Ogden (Project Assistant), Dan Tomlin (Project Assistant), Lisa deRamos (Project Assistant), Daniah Buageila (Project Assistant)																								
Other Project Names:																									
Sample Mgmt Sys	SurveyTrak; MSMS																								
Data Col Tool	Blaise 4.8																								
Hardware	Laptop																								
DE Software	NA																								
QC Recording Tool	DRI-CXM																								
Incentive	Yes, R																								
Administration	SRO Group																								
Payment Type	Check, prepaid (80.00)																								
Payment Method	Check through STrak RPay System																								

Report Period	Sep, 2017 (HRS 2016)	Project Phase	Implementing
Risk Level	Some Concerns		
Monthly Update	During the month of September, data collection for the new cohort and panel components continued. Non-final viable panel sample is being worked by the SSL in an effort to boost the panel response rate as high as possible. Field interviewers continue to be focused on new cohort, which includes screening and baseline interviewing. Additional strategies have been implemented in effort to boost production and discussions about how to address the significant shortage of baseline interviews due to viability of the non-final sample have been discussed with HRS study staff. In		

addition, design changes for future cohort recruitment are being assessed. Technical programming in SurveyTrak, WebTrak, and Blaise were made and released to the interviewing staff to accommodate some of the new cohort strategies implemented.

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

2018 Systems Development Milestones:

Web pilot – MSMS/Blaise 5 – Launched 28 August. Expected to end October 13. n=306.

CAPI test – SurveyTrak/Blaise 5 – October 2017 with field interviewers (internal test Oct. 10).

Key decision point – September 2017 – systems and modes for 2018 (MSMS/B5/B4.8/ST). We are planning to use SurveyTrak with Blaise 5 for field/SSL CAPI/CATI sample. MSMS with Blaise 5 will be used for web/non-response followup work (n=~2500).

Special Issues

Cost

Aug 31, 2017

Total Cost to Date (Direct + Indirect):	34,441,483.67
Estimated Cost at Completion (E\$AC):	38,660,816.20
Total Budget:	37,770,690.63
Variance (Budget minus E\$AC):	-5,081,689.20
Reason For Variance:	Projected cost to complete reflects extension of data collection through the end of 2017.

Projections

Aug 31, 2017

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

Measures

	Units Complete	RR	HPI
Current Goal:	23,569	85%	7.45
Goal at Completion:	23,569	85	7.45
Current actual:	20,745	72%	8.7
Estimate at Complete:	22,907	83	8.5
Variance:	-662	-2	-1.05

Other Measures

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

Project Name Housing & Children (HCDC, H&C)

Project Mode Primary: Face to Face Total of Modes: 1

Project Type Sponsored Projects **Project Status** Current

Budget **Direct Budget:** 8,774,925.00 **Indirect Budget:** 1,968,094.00 **Total Budget:** 10,743,019.00

Principal Investigator/Client

Funding Agency

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

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

Proposal #: no data

Description:

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

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

SRO Project Period 04/2016 - 02/2020

Data Col Period 05/2017 - 05/2018

Security Plan NA

Milestone Dates

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

Other Project

Team Members:

Other Project Names:	Housing & Children's Healthy Development
Sample Mgmt Sys	SurveyTrak; SMS; Illume
Data Col Tool	Blaise 4.8; SAQ
Hardware	Laptop; Desktop; [UM cell] Phone; Paper and Pencil; Other (laser measurement device)
DE Software	Blaise 4.8 BIA ; External vendor (CASO - scanning)
QC Recording Tool	DRI-CARI
Incentive	Yes, R; Yes, INF; Yes, Other (screening households)
Administration	SRO Group
Payment Type	Cash, prepaid (\$5 for subsample, \$2 prenotification); Cash, post (\$75 adult, \$50 child); Other (child gift <\$5, Fir
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office

Report Period	Sep, 2017 (HCDC, H&C)	Project Phase	Implementing
Risk Level	<i>Some Concerns</i>		
Monthly Update	<p>During September 2017, SRO activities included the following:</p> <p>Task 1: Management, Budget and Work Plan</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> Held regular meetings with the research team to discuss design, deliverables, schedule, funding, production issues, including responding to PI requests for item-level analyses. Invoicing <ol style="list-style-type: none"> Worked with JHU to revise allocations for future invoices. Worked with JHU to revise language in DUA to allow modification to expense distribution across funding agencies in order to meet invoicing deadlines related to funding availability. Reviewed/monitored budget. Revised monthly projections. Prepared weekly production reports. Continued to track and notify PIs during weekly meetings that the voucher cases were tracking significantly higher in terms of cost than budgeted. Modified production monitoring dashboards. Reviewed staff assignments for the remainder of Wave 1. Made adjustments to management staff to reduce ongoing expense. Worked with vendors to specify and prepare kits for Quarter 3 interviewing Worked with vendor to specify protocol for scanning of Time Diaries Analyzed data and prepared responses to PI questions about <ol style="list-style-type: none"> Thin slice coding by interviewers Laser tape measurement data Housing costs/financial data Released Quarter 2 Dallas voucher sample to team leaders and interviewers Conducted call record cost analysis to project and model potential cost cutting options Generated cost estimates for various cost cutting interventions Implemented call limit for voucher sample as a cost cutting intervention Modified recruitment materials according to PI preferences Began preparation of new IRB incorporating observation changes for homeless/shelter residence. Created and rolled out new protocol for DBS collection. Trained interviewers. <p>Task 2: Sampling</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> Monitored production progress versus sampling assumptions. Conducted cleaning, quality control, preparation of preload files and correction of errors for Dallas Quarter 2 voucher sample. Analyzed production data to estimate impacts of cost-cutting measures Prepared presentation for research team on impacts of limiting calls <p>Task 3: Questionnaire Development</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> Updated all specifications to comply with most recent IRB approvals. Prepared programming instructions. Created PAPI instrument to collect missing questions for interviews where PCG provided the wrong DOB of a focal child Modified specifications for collection of data about respondent special living situations such as homeless, living in shelter, living with another family (laser tape measurement, PCG instrument, Post-interview Observations) Updated scripting in household roster section to include confirmation of age/gender for each household member Incorporated soft check for child date of birth to ensure date of birth matches eligibility information. <p>Task 4: CAI Programming</p> <p>% Task Spent to Date</p>		

- Began programming questionnaire changes from August IRB submission.
- o Daily diaries change from four days to two days
- o Spanish translation corrections
- Programmed reminder to interviewer to only administer the Household SAQ one time per family.
- Extended recording capture list for PCG and child instruments
- Updated programming for data entry of laser tape measurements and neighborhood obs

Task 5: Systems Programming

% Task Spent to date

- Sample Management System Programming
- o Updated exportable reports to monitor completion of child activities and physical measures
- o Updated weekly DBS collection reports
- o Updated comprehensive log of contact data updates and email contacts
- o Created fix for language missing in Webtrak
- SurveyTrak
- o Added new result code
- o Added variables for PCG collections of cell phone, email and permission to text

Tasks 6, 7: Interviewer Recruitment & Hiring, Training

% Task Spent to Date

- Secured locations for supplemental training
- Generated budget for supplemental training
- Updated training manual chapters, Moodle platform and presentation slides for supplemental training
- Conducted interviewer training for new DBS collection protocols

Task 8: Main Data Collection

% Task Spent to Date

- Reviewed/monitored performance of interviewers. Created performance improvement plans where necessary.
- Conducted weekly Team Leader (TL) conference calls, weekly interviewing-team conference calls, and weekly one-on-one TL-Interviewer conference calls.
- Conducted reminder calling for Daily Diaries.
- Logged completed interview materials, dried blood spots. Reconciled incorrectly labeled or missing items.
- Distributed email notifications to voucher cases with email addresses.
- Reviewed all consent documents and respondent payment receipts.
- Cumulative production as of 9/30/2017:
 - o Completed
 - ☐ 765 Screener interviews (with eligible respondents), identified 1439 ineligible households, 717 non-sample addresses, 121 refusals
 - ☐ 445 PCG interviews
 - ☐ 559 Child interviews
- Implemented new DBS collection protocol beginning 9/25/2017

Task 9: Post Collection Processing

% Task Spent to Date

- 333 HH SAQs and 457 Child SAQs currently in the process of data entry

Task 10: Weighting

% Task Spent to Date

- N/A

Task 11: Final Data Deliverables

% Task Spent to Date

- Reviewed data deliverables.
- Delivered PCG and child data on September 8th, including SAQ data
- Programmed corrections for laser tape measurement and neighborhood observations
- Delivered HHM data on September 20th

Special Issues**Areas of Concern:**

- Hours per screener for the Voucher Sample are running significantly higher than budgeted due to sample quality issues. This is particularly true in Cleveland, where the sample addresses are much older, but even Dallas is affected by relatively low eligibility rates. This will negatively impact our ability to meet our interview goals as we won't have sufficient interviewer hours to do the work. We received permission to complete batch locating on the voucher cases, and released 167 phone number for the CMHA sample and 151 numbers for the DHA sample. We will continue to monitor the Voucher sample carefully. However, without a respondent locating budget and work authorization, we are concerned that we will be unable to either adequately follow up with voucher sample, or that we will need to complete more of the voucher screeners in person (as opposed to by telephone) than budgeted for.
- The frame for the population sample was determined in early March in order to have sufficient time to develop and select the population sample. Voucher sample zip codes provided to SRC by JHU in January was used to determine the Population sample frame. There is a risk of a mismatch between the Population sample and the Voucher sample, given the late arrival of the Voucher Sample.
- Coming out of the Pilot, SRC's cost analysis indicated that having an adult (PCG) interview approximately 13 minutes longer than originally projected (for voucher sample, we had projected 85 minutes) could be accommodated within our hours per interview (HPI) projections. However, early Main study timings indicate that the changed consent procedures have added significantly to the overall timings, with an average population interview length of 94.9 minutes (26.4 minutes over budgeted length) and an average voucher interview length of 108.3 minutes (29.8 minutes over the budgeted length). This includes adding about 8 minutes to the consenting and receipt management, and another 5-8 minutes primarily for revised social security forms. Early indicators are that this is contributing to interviewers having to make multiple visits to households to complete even just PCG interviews, but especially for PCG and child interviews.
- The rate of return for the Child Time Diary is better than it was in the Pilot, however it is still lower than desired for the project, despite reminder calling. SRC worked with the research team to develop a strategy to increase the return rate for this component. We incorporated changes from the research team which reduced the complexity of the diary. In addition, we are providing envelopes for each diary to encourage immediate return, which may help to improve return rates of individual diaries. SRC is emphasizing the importance of the diary in the July refresher trainings with interviewers.
- Rates of return of the Household SAQ are lower than in the Pilot, and are lower than desired for the study overall. SRC is emphasizing the importance of the SAQs to interviewers in the July refreshers trainings, and is also emphasizing proper document shipping protocols.
- PCG dried blood spot collection is adequate, and participation rates are high. Child consent/assent rates are far higher than in the Pilot. However interviewers (even experienced interviewers) are unable to completely fill spots on the collection cards. A refresher on DBS collection was included in the July refresher training. Even after the refresher training, interviewers are not able to gather sufficient blood from children. SRC is working with the research team to review options for changing lancets.

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 reviewed 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. (Approved)
- Questionnaire Development – Additional (and unanticipated) programming was needed for Hearts and Flowers due to a timing specification change received from research team. (Approved)
- Worked with ICPSR to prepare scope and budget for production of public use datasets. (Pending)
- At the request of the research team, SRC developed a locating program and recruited locating staff due to expectations that a much higher proportion of phone numbers for the Voucher sample will be unusable. (Approved)
- Reprinted the Social Security booklets to eliminate the earnings and benefits pages. Reprinted all existing PCG and Child bags, and shipped new supplies to interviewers. Altered programming to eliminate the Social Security consent administration, and then reinstate administration for one page only. (Approved)

Cost
Sep 30, 2017

Total Cost to Date (Direct + Indirect):	3,823,862.59
Estimated Cost at Completion (E\$AC):	11,010,696.00
Total Budget:	10,743,019.00
Variance (Budget minus E\$AC):	-267,677.00
Reason For Variance:	

We are projecting a substantial overrun. The Voucher sample is performing far worse than anticipated, resulting in far fewer completions than anticipated. In addition, although the management task shows an underrun, the project has incurred overruns in Questionnaire Development and Programming due to schedule compression, "crashing" the schedule, and undertaking far more questionnaire changes than planned or budgeted. Interviewer hours are running far higher per family than budgeted (almost twice the budgeted amount). The SRC team is negotiating with the PIs and funding agencies for work scope reductions or changes to bring the budget in line with funding, as well as fund-raising efforts to fund the project work scope.

Projections
Sep 30, 2017

Dollars Projected For Month: 432,857.55
Actual Dollars Used: 384,916.19
Variance (Projected minus Actual): 47,941.36
Reason For Variance: The project experienced lower salary/fringe costs than anticipate in August due to staff vacations and absences. The % of new hires on the project is leading to lower interviewing salary costs than projected.

Measures

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

Other Measures

Project Name	HRS 2017 Consumption and Activity Mail Study (CAMS 2017)			
Project Mode	Primary: Mail Total of Modes: 1			
Project Type	Sponsored Projects		Project Status	Current
Budget	Direct Budget:	294,117.00	Indirect Budget:	105,883.00
			Total Budget:	400,000.00
Principal Investigator/Client	David Weir (SRC) Mary Beth Ofstedal (SRC)			

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

Proposal #: no data

Description: CAMS is part of the Health and Retirement Study (HRS). The goal of CAMS is to gather additional data on household consumption and activities of daily living from participants in the HRS. In 2017, a paper questionnaire will be mailed to approximately 8,000 respondents of which 6,000 will receive the full questionnaire and 2,000 spouse/partners will receive a brief questionnaire.

SRO Project Period 06/2017 - 05/2018

Data Col Period 09/2017 - 04/2018

Security Plan Yes

Milestone Dates

PreProduction Start: 05/22/2017

Pretest Start:

Pretest End:

Recruitment Start:

Staffing Completed:

GIT Start:

SS Train Start:

SS Train End:

DC Start: 09/27/2017

DC End: 04/30/2018

Other Project Team Members: Actual budget analyst is Grace Tison but she is not available in the drop-down list.

Data Manager: Qi Zhu
Project Assistant: Jeannie Baker
Programmer: Holly Ackerman
Assembly Coordinator: Vicki Wagner
Project Manager: Jennifer Arrieta
CAMS

Other Project Names:

Sample Mgmt Sys Other (Weblog)

Data Col Tool SAQ

Hardware Paper and Pencil

DE Software Other (HRS study staff is responsible for data entry)

QC Recording Tool N/A

Incentive Yes, R; Yes, Other (spouse)

Administration SRO Group

Payment Type Check, prepaid (\$25 to main R and \$10 to spouse R)

Payment Method Check through STrak RPay System

Report Period	Sep, 2017 (CAMS 2017)	Project Phase	Implementing
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Risk Level On Track

Monthly Update Preparation for the CAMS production continued through early September and the mailing was assembled and mailed out on 9/27/17. Production work will begin in the days following the mailing, which will include logging training and production logging. We expect logging work will be minimal until the beginning of October.

Other work this month included the preparation of the CAMS sample, finalization of the CAMS Web Logging component, and assembly of materials and resources for the first mailing and the beginning of production. Due to the

delay in IRB approval, we anticipate material costs to hit in September rather than what was originally projected in August.

Special Issues

The CAMS mailing was pushed back 1 week due to a slight delay in IRB approval (09/27/2017). Moving forward, subsequent mailings will be moved back as well which will require updated monthly projections moving forward.

Cost

Aug 31, 2017

Total Cost to Date (Direct + Indirect):	10,571.52
Estimated Cost at Completion (E\$AC):	392,250.46
Total Budget:	400,000.00
Variance (Budget minus E\$AC):	5,432.54
Reason For Variance:	Adjustments to projections based on staff assigned and work in August.

Projections

Aug 31, 2017

Dollars Projected For Month:	245,785.89
Actual Dollars Used:	5,465.23
Variance (Projected minus Actual):	240,320.66
Reason For Variance:	Pushing forward non salary and hours due to delay in IRB approval.

Measures

	Units Complete	RR	HPI
Current Goal:		70%	
Goal at Completion:			
Current actual:			
Estimate at Complete:			
Variance:			

Other Measures

Project Name Mathematics Teachers & Teaching Study (MTTS)

Project Mode Primary: Mail Secondary: Telephone Total of Modes: 2

Project Type Sponsored Projects **Project Status** Current

Budget ***Direct Budget:*** 656,787.81 ***Indirect Budget:*** 362,629.19 ***Total Budget:*** 1,019,417.00

Principal Investigator/Client Heather Hill (Harvard Graduate School of Education)
Patty Maher (ISR PI)

Funding Agency

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

Project Team

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

Proposal #: no data

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

SRO Project Period 09/2014 - 06/2016

Data Col Period 01/2015 - 12/2015

Security Plan NA

Milestone Dates

PreProduction Start: 10/01/2014

Pretest End:

Staffing Completed:

SS Train Start:

DC Start: 03/02/2015

Pretest Start:

Recruitment Start: 01/26/2015

GIT Start:

SS Train End:

DC End: 05/31/2016

Other Project**Team Members:**

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

Other Project**Names:**

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

Report Period	Sep, 2017 (MTTS)	Project Phase	Closing
Risk Level	On Track		
Monthly Update	During September, SRO completed the following tasks - Worked on preparing final sample materials and data for the MKT data collection - Data entry and updating of the SRIS system - district approvals		
Special Issues	The School of Education and EWB will charge time and travel expenses in November, with the permission of the Harvard PI.		
Cost			
Sep 30, 2017	Total Cost to Date (Direct + Indirect):	978,720.61	
	Estimated Cost at Completion (E\$AC):	1,012,022.11	
	Total Budget:	1,019,417.00	
	Variance (Budget minus E\$AC):	7,394.89	
	Reason For Variance:	SRC is projecting a small underrun, due to work scope changes on the main project (lower participant and therefore lower respondent payments).	
Projections			
Sep 30, 2017	Dollars Projected For Month:	0.00	
	Actual Dollars Used:	0.00	
	Variance (Projected minus Actual):	0.00	
	Reason For Variance:		

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

Other Measures

Project Name	Monitoring the Future Web Programming and Survey Pilot (MTF Illume Web 2017)														
Project Mode	Primary: Mixed Total of Modes: 2														
Project Type	Sponsored Projects		Project Status	Current											
Budget	Direct Budget:	105,732.94	Indirect Budget:	58,153.12	Total Budget: 163,886.06										
Principal Investigator/Client	Megan Patrick (UM-SRC)														
Funding Agency															
IRB	HUM#:		Period Of Approval:												
Project Team	Project Lead:		Donnalee Ann Grey-Farquharson												
	Budget Analyst:		Christine Evanchek												
	Production Manager:		Lloyd Fate Hemingway												
	Senior Project Advisor:		Gina-Qian Yang Cheung												
	Production Manager:														
	Production Manager:														
Proposal #:	no data														
Description:	<p>This project is a continuation of MTF-WPSP Year 2/MTF Illume Web 2016. A new project is being created in MPR because the Project required a new PG.</p> <p>For this round of data collection we have 2 conditions:</p> <p>1. Paper - URL with credential provided if not complete after 1 month, or URL provided if requested</p> <p>2. Web - Paper provided if requested or if not complete after 1 month</p> <p>Note - Both conditions are eventually given each option if not completed</p>														
SRO Project Period	05/2017 - 12/2017														
Data Col Period	05/2017 - 09/2017														
Security Plan	NA														
Milestone Dates	<table><tr><td>PreProduction Start:</td><td>Pretest Start:</td></tr><tr><td>Pretest End:</td><td>Recruitment Start:</td></tr><tr><td>Staffing Completed:</td><td>GIT Start:</td></tr><tr><td>SS Train Start:</td><td>SS Train End:</td></tr><tr><td>DC Start:</td><td>DC End:</td></tr></table>					PreProduction Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
PreProduction Start:	Pretest Start:														
Pretest End:	Recruitment Start:														
Staffing Completed:	GIT Start:														
SS Train Start:	SS Train End:														
DC Start:	DC End:														
Other Project Team Members:	Gina-Qian Yang Cheung, Donnalee Grey-Farquharson, Hueichun Peng, Lloyd Hemingway, Shaowei Sun (year 3 only), Jennie Williams, Peter Sparks, Dave Dybicki, Ashwin Dey														
Other Project Names:	MTF Web														
Sample Mgmt Sys	SMS; Web SMS; Illume														
Data Col Tool	NA														
Hardware	NA														
DE Software	NA														
QC Recording Tool	NA														
Incentive	Yes, Other (Managed by SRC Study Staff)														
Administration	NA														
Payment Type	N/A														
Payment Method	N/A														

Report Period	Sep, 2017 (MTF Illume Web 2017)	Project Phase	Closing
Risk Level	Not Rated		
Monthly Update	Non-response calling continues.		
	18.81% Web completes		
	17.86% SAQ received		
Special Issues			

Cost Aug 31, 2017	Total Cost to Date (Direct + Indirect):	89,047.16
	Estimated Cost at Completion (E\$AC):	137,786.85
	Total Budget:	163,886.06
	Variance (Budget minus E\$AC):	26,099.15
	Reason For Variance:	

Projections Aug 31, 2017	Dollars Projected For Month:	33,338.66
	Actual Dollars Used:	25,160.46
	Variance (Projected minus Actual):	8,178.20
	Reason For Variance:	

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

Other Measures

Project Name	National Survey of Family Growth (NSFG 2010-2020)													
Project Mode	Primary: Face to Face Total of Modes: 1													
Project Type	Sponsored Projects		Project Status	Current										
Budget	Direct Budget:	32,653,126.47	Indirect Budget:	8,448,262.00 Total Budget: 41,101,388.47										
Principal Investigator/Client	Joyce Abma (NCHS) Mick Couper (ISR)													
Funding Agency	NCHS, CDC, NICHD													
IRB	HUM#:	0002716	Period Of Approval:	7/17/13 - 7/17/17										
Project Team	Project Lead: Heidi Marie Guyer Budget Analyst: Nancy Oeffner Production Manager: Theresa Camelo Senior Project Advisor: Mary P Maher Production Manager: Maureen Joan O'Brien Production Manager: Rebecca Loomis													
Proposal #:	no data													
Description:	<p>The NSFG is a national survey of women and men 15-49 years of age designed to provide national estimates of factors affecting pregnancy and birth rates, including sexual activity, cohabitation, marriage, divorce, contraceptive use, miscarriage and stillbirth, infertility, and use of medical services for family planning and infertility. NSFG 2010-2020 includes eight years of continuous data collection starting in September 2011 and ending in 2019. Every year, new PSUs will be selected to replace last year's non-self representing PSUs and self-representing PSUs, and the project will continue to collect data from a set of major self representing PSUs throughout the entire data collection period. Target number of interviews is approximately 5000 per year.</p>													
SRO Project Period	09/2010 - 07/2020													
Data Col Period	09/2011 - 06/2019													
Security Plan	Yes													
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start: 03/01/2011</td> <td style="padding: 5px;">Pretest Start:</td> </tr> <tr> <td style="padding: 5px;">Pretest End:</td> <td style="padding: 5px;">Recruitment Start: 06/01/2011</td> </tr> <tr> <td style="padding: 5px;">Staffing Completed: 08/17/2011</td> <td style="padding: 5px;">GIT Start: 09/13/2011</td> </tr> <tr> <td style="padding: 5px;">SS Train Start: 09/15/2011</td> <td style="padding: 5px;">SS Train End: 09/19/2011</td> </tr> <tr> <td style="padding: 5px;">DC Start: 09/20/2011</td> <td style="padding: 5px;">DC End: 09/07/2019</td> </tr> </table>				PreProduction Start: 03/01/2011	Pretest Start:	Pretest End:	Recruitment Start: 06/01/2011	Staffing Completed: 08/17/2011	GIT Start: 09/13/2011	SS Train Start: 09/15/2011	SS Train End: 09/19/2011	DC Start: 09/20/2011	DC End: 09/07/2019
PreProduction Start: 03/01/2011	Pretest Start:													
Pretest End:	Recruitment Start: 06/01/2011													
Staffing Completed: 08/17/2011	GIT Start: 09/13/2011													
SS Train Start: 09/15/2011	SS Train End: 09/19/2011													
DC Start: 09/20/2011	DC End: 09/07/2019													
Other Project Team Members:	Chrissy Evanchek--Budget Analyst													
Other Project Names:														
Sample Mgmt Sys	SurveyTrak													
Data Col Tool	Blaise 4.8													
Hardware	Tablet; [UM cell] Phone; Paper and Pencil													
DE Software	NA													
QC Recording Tool	N/A													
Incentive	Yes, R; Yes, Other (babysitting fee)													
Administration	SRO Group													
Payment Type	Cash, prepaid (\$5; \$40); Cash, post (\$40; \$60)													
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office													

Report Period	Sep, 2017 (NSFG 2010-2020)	Project Phase	Implementing
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Risk Level	On Track
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Monthly Update	<p>We are now in Week 1 of Q25. We finished Q24 with 1,246 main interviews and 5,027 for the year, just above the goal of 5,000. The current production focus is on completing Screeners. Most quarters are 12 weeks, but this first quarter of the year typically has 14 weeks including a week 00 and week 0 before week 1. We are currently ahead of our main iw and screener completion rate goal for this point in the quarter when comparing to previous 1st quarters which also have 14 weeks. Two factors may be contributing to these production statistics. One is that no lwers from the August training have attrited. The second factor is NSFG's new staffing model in which there are 2 lwers in most PSU's (18 of 32) who work 20 hours per week each instead of one lwer who works 30 hours per week. Reserve sample is being released as lwers are successfully working the sample they have now. The production team will</p>
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continue to monitor this closely. The Phase Boundary experiment has been approved by NCHS' ERB in which for 5 PSU's, Double Sample will begin 1 week early (week 10). The Project Management Team will plan this experiment this quarter and implement next quarter and run one quarter only. No decisions have been made regarding a mid-year attrition training.

Special Issues

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

**Cost
Sep 30, 2017**

Total Cost to Date (Direct + Indirect): 5,059,817.39
Estimated Cost at Completion (E\$AC): 5,732,729.39
Total Budget: 41,101,388.47
Variance (Budget minus E\$AC): 672,912.39
Reason For Variance: Additional workscope, higher than anticipated HPI, higher yield, higher interviewer attrition, increased travel, increased hiring and training

**Projections
Sep 30, 2017**

Dollars Projected For Month: 594,135.30
Actual Dollars Used: 672,912.39
Variance (Projected minus Actual): 13,575.84
Reason For Variance: Fewer interviewer hours than projected, delay in travel expenses and respondent payments.

Measures

	Units Complete	RR	HPI
Current Goal:	1250	68%	10.0
Goal at Completion:	5000	79%	10.0
Current actual:	253	25.1%	12.7
Estimate at Complete:	4972	61.8%	10.3
Variance:	28	18.2%	.3

Other Measures

The goals represent Q25 goals and actuals. We are now in Week 1 of Quarter 25. The HPI goal has changed to 10.0. The completion goals above are the annual goals. The current goal is for the current quarter.

Project Name	Neurodevelopmental Pathways in Adolescent Health Risk Behavior (AHRB)				
Project Mode	Primary: Class SAQ	Secondary: Web	Total of Modes: 2		
Project Type	Sponsored Projects	Project Status	Current		
Budget	Direct Budget: 919,405.00	Indirect Budget: 507,595.00	Total Budget: 1,427,000.00		
Principal Investigator/Client	Daniel Keating (U-M SRC)				
Funding Agency	Health and Human Services (HHS), Department of-National Institutes of Health				
IRB	HUM#: HUM00084650	Period Of Approval:	2/3/2016 - 2/2/2017		
Project Team	Project Lead: Peter Rakesh Batra Budget Analyst: Dean E Stevens Production Manager: Senior Project Advisor: Stephanie A Chardoul Production Manager: Peter Rakesh Batra Production Manager:				
Proposal #:	no data				
Description:	<p>During early adolescence systems in the brain that are characterized by heightened reactivity to motivational stimuli and rewards mature rapidly, while systems that enable more effective cognitive control and judgment mature more slowly. This "developmental maturity mismatch" has been proposed as a key contributor to health risk behavior among adolescents, which is of critical importance because: (1) risk behaviors are the leading cause of morbidity and mortality in this age group, including diseases arising from unprotected sexual activity and casualties arising from reckless behavior (including driving fatalities and serious injuries); (2) it is the peak age for the onset of a wide range of risk behavior patterns with potential long-term consequences, including substance use and abuse, and delinquency. The "developmental maturity mismatch" hypothesis, however, has not been directly tested in relation to risk behavior at a level sufficient to inform this critical health area. The primary aim of the ANDH study is to understand the behavioral, cognitive, and neural bases of risk taking, through integrated analyses of age differences, developmental trajectories, and individual differences in psychosocial, neurocognitive and neural imaging assessments.</p> <p>The study will involve data collection from 10th and 12th grade students (~2000 students total) in 7-8 local high schools (approximately 150 students from each age group per school), with group administration in the schools using laptops in a baseline data collection to be completed over a 3-month period in the fall of 2014. Each respondent will attend 2 ~45 minute sessions: one survey and one neurocognitive tests. After the baseline data collection, SRO will modify the survey questionnaire to operate as a web-based survey, and will administer the web survey to all 2,000 respondents in years 2, 3, and 4 of the project (in the fall of 2015, 2016 and 2017). A small number of respondents (150-160) will be sub-selected to undergo neural imaging at U-M facilities in Ann Arbor (SRO will not be directly involved in this portion of the study).</p>				
SRO Project Period	04/2014 - 03/2018				
Data Col Period	03/2015 - 01/2016				
Security Plan	Yes				
Milestone Dates	<table border="1" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> PreProduction Start: Pretest End: 01/03/2017 Staffing Completed: SS Train Start: DC Start: 09/01/2016 </td> <td style="width: 50%; vertical-align: top;"> Pretest Start: 12/21/2016 Recruitment Start: GIT Start: SS Train End: DC End: 05/31/2018 </td> </tr> </table>			PreProduction Start: Pretest End: 01/03/2017 Staffing Completed: SS Train Start: DC Start: 09/01/2016	Pretest Start: 12/21/2016 Recruitment Start: GIT Start: SS Train End: DC End: 05/31/2018
PreProduction Start: Pretest End: 01/03/2017 Staffing Completed: SS Train Start: DC Start: 09/01/2016	Pretest Start: 12/21/2016 Recruitment Start: GIT Start: SS Train End: DC End: 05/31/2018				
Other Project Team Members:	<p>Wave 2 Team: Kyle Kwaiser (tech lead, data manager), Kathy LaDronka, Becky Loomis, Dolorence Okullo (data management), Hueichun Peng, Shaowei Sun</p> <p>Wave 1 Team: Larry Daher, Emmanuel Ellis, David Bolt, Kyle Goodman, Donnalee Grey-Farquharson, Kyle Kwaiser (tech lead, data manager), Becky Loomis, Max Malhotra, Shaowei Sun, Laura Yoder (data management)</p>				

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

Report Period	Sep, 2017 (AHRB)	Project Phase	Implementing
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Risk Level	On Track
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Monthly Update	<p>In September we sent a final email reminder that went to Respondents in all Releases (1 & 2/3), yielding an additional 41 complete responses. This was somewhat surprising since all non-responding R's had received multiple email reminder messages, and at least one phone call. We estimated only an additional 10-15 more complete responses. For this final email reminder we also used a different subject line which could have contributed to the increase. The final reminder "Final Opportunity to earn \$50 in U-M Study" was the first time we have placed the incentive amount in the subject line. There is a danger, of course. Release 1 respondents completing their study requirements now will be asked to participate in Wave 3 in mid-February--only 5 months away. This issue was discussed with the PI prior to the final reminder being sent out.</p>
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During this month we also met with the larger Study team in a formal meeting to discuss a plan forward and options for Wave 3 data collection. Up to this point, I have been meeting with Ed to explore various options with the money we have left in the budget, but our meeting at the end of this month has started the ball rolling on what changes we need to make for Wave 3 of this study. The current plan is to conduct Wave 3 in the same way as Wave 2, except we will not send out the \$2 bill with the pre-notification mailing. We should still be able to stay on budget with this option.

Special Issues

Cost	Total Cost to Date (Direct + Indirect):	1,252,464.77
Sep 20, 2017	Estimated Cost at Completion (E\$AC):	1,454,045.97
	Total Budget:	1,427,000.00
	Variance (Budget minus E\$AC):	-27,045.97
	Reason For Variance:	

Projections	Dollars Projected For Month:	0.00
Sep 20, 2017	Actual Dollars Used:	0.00
	Variance (Projected minus Actual):	0.00
	Reason For Variance:	

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

Other Measures

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

Project Mode Primary: Telephone Total of Modes: 1

Project Type Sponsored Projects **Project Status** Current

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

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

Funding Agency

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

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

Proposal #: no data

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

SRO Project Period 03/2015 - 12/2017

Data Col Period 07/2015 - 07/2017

Security Plan NA

Milestone Dates

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

Other Project**Team Members:****Other Project****Names:**

Sample Mgmt Sys SMS

Data Col Tool NA

Hardware Desktop

DE Software NA

QC Recording Tool NA

Incentive Yes, Other (Amazon gift card (Project staff))

Administration NA

Payment Type NA

Payment Method NA

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

Risk Level On Track

Monthly Update Technical systems and programming are being modified and tested. Plans for training in September are underway. Enrollment has started at the sites involved in the study and so 3 month follow-ups will start the beginning of October. Training delayed 2 weeks because of changes to instrument. This means all sites will need to re-do IRB approvals so

cases will be activated as IRB approvals are obtained.

Special Issues

Cost Sep 30, 2017	Total Cost to Date (Direct + Indirect):	1,071,936.98
	Estimated Cost at Completion (E\$AC):	1,976,559.22
	Total Budget:	1,979,245.00
	Variance (Budget minus E\$AC):	2,685.78
	Reason For Variance:	

Projections Sep 30, 2017	Dollars Projected For Month:	34,623.95
	Actual Dollars Used:	28,143.47
	Variance (Projected minus Actual):	6,480.48
	Reason For Variance:	Delay in training date will push some costs forward

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

Other Measures	There will actually be two surveys in phase 1 (at 3 months and 6 months)...and then a second phase survey.
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Project Name Panel Study of Income Dynamics - Transition to Adulthood Study 2017 (PSID TAS 2017)

Project Mode Primary: Telephone Total of Modes: 1

Project Type Sponsored Projects **Project Status** Current

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

Principal Investigator/Client Narayan Sastry (SRC-PSID)

Funding Agency

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

Project Team ***Project Lead:*** Rachel Anne LeClere
Budget Analyst:
Production Manager:
Senior Project Advisor:
Production Manager:
Production Manager:

Proposal #: no data

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

SRO Project Period 05/2017 - 06/2018

Data Col Period 10/2007 - 05/2018

Security Plan NA

Milestone Dates

<i>PreProduction Start:</i>	<i>Pretest Start:</i>
<i>Pretest End:</i>	<i>Recruitment Start:</i>
<i>Staffing Completed:</i>	<i>GIT Start:</i>
<i>SS Train Start:</i>	<i>SS Train End:</i>
<i>DC Start:</i>	<i>DC End:</i>

Other Project Team Members:

Other Project Names:

Sample Mgmt Sys SurveyTrak

Data Col Tool Blaise 4.8

Hardware Laptop; [UM cell] Phone

DE Software N/A

QC Recording Tool N/A

Incentive Yes, R

Administration NA

Payment Type Check, post (70)

Payment Method Check through other system (PSID RAPS)

Report Period Sep, 2017 (PSID TAS 2017) **Project Phase** Planning

Risk Level Not Rated

Monthly Update In September:

~Finalized training materials and staffing. We have 28 iwers, 1 PC and 2 TLs
~Finished instrument and systems programming
~Planning to launch production on October 5th.

Special Issues

Cost Sep 18, 2017	<i>Total Cost to Date (Direct + Indirect):</i>	99,598.04
	<i>Estimated Cost at Completion (E\$AC):</i>	1,896,330.74
	<i>Total Budget:</i>	1,904,835.00
	<i>Variance (Budget minus E\$AC):</i>	8,504.26
	<i>Reason For Variance:</i>	

Projections Sep 18, 2017	<i>Dollars Projected For Month:</i>	0.00
	<i>Actual Dollars Used:</i>	0.00
	<i>Variance (Projected minus Actual):</i>	0.00
	<i>Reason For Variance:</i>	

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

Other Measures

Project Name	PSID Immigrant Refresher Screening Project (PSID-Imm)												
Project Mode	Primary: Telephone	Secondary: Face to Face	Total of Modes: 2										
Project Type	Sponsored Projects	Project Status	Current										
Budget	Direct Budget: 1,226,546.00	Indirect Budget: 674,666.00	Total Budget: 1,901,212.00										
Principal Investigator/Client	Narayan Sastry (SRC)												
Funding Agency	NICHD												
IRB	HUM#: HUM00062417	Period Of Approval:	3/13/17-3/12/18										
Project Team	Project Lead: Rachel Anne Orłowski Budget Analyst: Production Manager: Sara D Freeland Senior Project Advisor: Stephanie A Chardoul Production Manager: Production Manager:												
Proposal #:	no data												
Description:	Screening Housing Units (that HRS-2016 determined were ineligible for their study and had at least one household member born outside of the U.S. and came to the U.S. in the past 20 years) to determine whether either the Head or Spouse/Partner of each Family Unit moved to the U.S. after 1997. Eligible Family Units are invited to participate in PSID Core 2017.												
SRO Project Period	01/2016 - 12/2017												
Data Col Period	06/2016 - 09/2017												
Security Plan	NA												
Milestone Dates	<div style="border: 1px solid black; padding: 5px;"> <table> <tr> <td>PreProduction Start: 01/04/2016</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start: 03/24/2016</td> </tr> <tr> <td>Staffing Completed: 06/23/2017</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start: 06/01/2016</td> <td>SS Train End: 06/30/2017</td> </tr> <tr> <td>DC Start: 06/06/2016</td> <td>DC End: 09/19/2017</td> </tr> </table> </div>			PreProduction Start: 01/04/2016	Pretest Start:	Pretest End:	Recruitment Start: 03/24/2016	Staffing Completed: 06/23/2017	GIT Start:	SS Train Start: 06/01/2016	SS Train End: 06/30/2017	DC Start: 06/06/2016	DC End: 09/19/2017
PreProduction Start: 01/04/2016	Pretest Start:												
Pretest End:	Recruitment Start: 03/24/2016												
Staffing Completed: 06/23/2017	GIT Start:												
SS Train Start: 06/01/2016	SS Train End: 06/30/2017												
DC Start: 06/06/2016	DC End: 09/19/2017												
Other Project Team Members:													
Other Project Names:													
Sample Mgmt Sys	SurveyTrak												
Data Col Tool	Blaise 4.8												
Hardware	Laptop; [UM cell] Phone												
DE Software	N/A												
QC Recording Tool	DRI-CARI												
Incentive	Yes, R												
Administration	ISR Group (PSID)												
Payment Type	Check, post (\$10, \$40 End Game); Cash, prepaid (\$5 End Game); Cash, post (\$10); Other (Non-monetary ince												
Payment Method	Check through STrak RPay System; Imprest Cash Fund from ISR Business Office												

Report Period	Sep, 2017 (PSID-Imm)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	Ended End Game and remaining data collection on 9/22. Completed final data cleaning. Delivered final data set to client on 9/27/17. Began close-out documentation.		
Special Issues			
Cost Sep 30, 2017	Total Cost to Date (Direct + Indirect): 1,555,847.66 Estimated Cost at Completion (E\$AC): 1,572,688.69 Total Budget: 1,901,212.00 Variance (Budget minus E\$AC): 328,523.31 Reason For Variance: Less programming, no new-hire recruitment, smaller in-person training, fewer lines--in fewer areas, fewer iwers		

Projections
Sep 30, 2017

Dollars Projected For Month: 36,656.05
Actual Dollars Used: 28,930.53
Variance (Projected minus Actual): 7,725.52
Reason For Variance: Less management

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:			
Current actual:	920	63%	6.5
Estimate at Complete:			
Variance:			

Other Measures

Project Name	Stress and Wellbeing in Everyday Life (SWEL)												
Project Mode	Primary: Face to Face	Secondary: Observation	Total of Modes: 2										
Project Type	Sponsored Projects	Project Status	Current										
Budget	Direct Budget: 441,062.00	Indirect Budget: 242,585.00	Total Budget: 683,647.00										
Principal Investigator/Client	Kira Birditt (UM ISR Life Course Development) Toni Antonucci (UM ISR Life Course Development)												
Funding Agency													
IRB	HUM#: TBD	Period Of Approval:	TBD										
Project Team	Project Lead: Piotr Dworak Budget Analyst: Janelle P Cramer Production Manager: Derek Dubuque Senior Project Advisor: Kirsten Haakan Alcser Production Manager: Production Manager:												
Proposal #:	no data												
Description:	<p>SWEL is a study to assess the role of cardiovascular stress in daily lives among matched test and control groups of ethnic minority and white respondents. Data collected via an interviewer-administered 30-min instrument, followed by a 4-day measurement of cardiovascular activity using a wearable biometric device, and 6-per-day self-administered momentary assessments.</p> <p>Data collection goal: 300 CAPI interviews (79% RR on sample of ~380), revised to test/control setup in which 150 interviews are needed from 173 test subjects (87% RR) and 150 interviews from the 307 control subjects (48% RR).</p> <p>Sample: Participants in Wave 3 of Social Relations (2014) from the Detroit tri-county area.</p> <p>Data collection period: estimated for 13 weeks but both the staffing levels and the proposed data collection pace is being discussed with the client given the availability of the wereable devices.</p>												
SRO Project Period	12/2016 - 10/2017												
Data Col Period	06/2017 - 09/2016												
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%;"> <tr> <td>PreProduction Start: 03/01/2017</td> <td>Pretest Start: 01/22/2018</td> </tr> <tr> <td>Pretest End: 02/02/2018</td> <td>Recruitment Start: 11/01/2017</td> </tr> <tr> <td>Staffing Completed: 01/02/2018</td> <td>GIT Start: 02/05/2018</td> </tr> <tr> <td>SS Train Start: 02/07/2018</td> <td>SS Train End: 02/09/2018</td> </tr> <tr> <td>DC Start: 02/11/2018</td> <td>DC End: 07/29/2018</td> </tr> </table>			PreProduction Start: 03/01/2017	Pretest Start: 01/22/2018	Pretest End: 02/02/2018	Recruitment Start: 11/01/2017	Staffing Completed: 01/02/2018	GIT Start: 02/05/2018	SS Train Start: 02/07/2018	SS Train End: 02/09/2018	DC Start: 02/11/2018	DC End: 07/29/2018
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SS Train Start: 02/07/2018	SS Train End: 02/09/2018												
DC Start: 02/11/2018	DC End: 07/29/2018												
Other Project Team Members:													
Other Project Names:	Racial Disparities in Health: The Roles of Stress, Social Relations, and the Cardiovascular System												
Sample Mgmt Sys	MSMS												
Data Col Tool	Blaise 4.8; Blaise 5												
Hardware	Laptop												
DE Software	NA												
QC Recording Tool	Camtasia												
Incentive	Yes, R												
Administration	SRO Group												
Payment Type	Cash, prepaid (2); Cash, post (30); Other (Cash post biomarker)												
Payment Method	Check through other system (MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (MSMS)												

Report Period	Sep, 2017 (SWEL)	Project Phase	Implementing
Risk Level	Not Rated		
Monthly Update	The SWEL Pilot, carried out by the LCD project team is put on hold.		

The client hopes to invite the next 20 respondents in early October and their Blood Pressure will be measured using a different instrument - a CareTaker device.

The delay is due to Caretaker. The device does not work with the bodyguardian phone. SRO configured a backup SRO phone (J3 samsung) and conducted successful tests to get Caretaker operational. However, using SRO phone would require respondent to carry two devices - a BG phone and SRO phone.

In the meantime, Caretaker issued a fix and delivered new 4 devices on 10/03. They are being tested now.

In September HolIriT suffered a system-wide outage due to moving Google/Azure servers. Dave Padot was able to fix it as of late September and HolIriT appears fully functional.

However, HolIriT license expires in October. Jim has formulated a plan for SRO to assume HolIriT development and provide funds necessary for SWEL to continue using HolIriT. Currently SRO does not have a backup app that would meet study requirements.

Several factors: the extension of SWEL performance period, pilot experiences, and revisions to the scope led to re-budgeting of SRO SWEL cost. A re-budget proposal in the amount of \$760,158 along with the memo was submitted to Dr. Birditt on 9/25. The key components of additional costs include a) additional management time as a result of the extension b) increase in the level of tech / help desk support needed to ensure interviewers/respondents' issues with devices are dealt with timely and do not result in non-response and c) changes in scope (number of devices, data collection period, increase in baseline interview length).

Special Issues

SWEL is being re-budgeted.

Cost Oct 31, 2017

Total Cost to Date (Direct + Indirect):	116,964.41
Estimated Cost at Completion (E\$AC):	683,648.00
Total Budget:	683,647.00
Variance (Budget minus E\$AC):	0.00
Reason For Variance:	

Projections Oct 31, 2017

Dollars Projected For Month:	10,985.16
Actual Dollars Used:	10,687.39
Variance (Projected minus Actual):	297.77
Reason For Variance:	

Measures

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

Other Measures

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

Report Period	Sep, 2017 (SCA 2017)	Project Phase	Implementing
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Risk Level*Attention!***Monthly Update**

SCA completed its September study a day early, finishing with 612 completed interviews with the desired split: 408 RDDs and 204 Recons. This instrument length was similar to August, at 27.3 minutes in length, but we were able to complete the study month with a lower HPI of 3.16 and about 180 fewer interviewer hours, using 1936.4. SCA delivered a decent prelim total of 408 completes, despite needing to remove sample lines from the calling rotation in areas that were affected by the two major hurricanes that hit this month. These sample lines were moved back into calling later in the month. It is possible that the better HPI is a result of our focus on first contact skills, but it is possible as well that the project received a bounce in cooperation from respondents overall due to these disasters, something we saw a decade-plus ago when Hurricane Katrina occurred. While this month we needed to put more dials on Recons than in the previous three months, we had the second lowest dial rate per RDD this year, which accounts for the increased efficiency, despite our refusal total staying about the same and our refusal conversion rate actually being lower than the previous month. SCA trained seven new interviewers in September, six of whom have thus far been cleared for production, and continued to focus on improving contact and probing skills through workshops.

Special Issues

SCA continues to run higher than expected on HPI and on interviewer attrition. This keeps pushing up costs, and we have already spent more in training costs and QC than was anticipated in the entire annual budget, and each additional training only increases this disparity.

**Cost
Sep 14, 2017**

Total Cost to Date (Direct + Indirect):	685,625.70
Estimated Cost at Completion (E\$AC):	996,093.72
Total Budget:	859,872.00
Variance (Budget minus E\$AC):	-136,221.72
Reason For Variance:	Interviewer hours are overall running much higher than expected.

**Projections
Sep 14, 2017**

Dollars Projected For Month:	67,926.00
Actual Dollars Used:	52,999.66
Variance (Projected minus Actual):	1,284.25
Reason For Variance:	This particular month should end up relatively close to budget.

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:	600	8	3.00
Current actual:			
Estimate at Complete:	612	7	3.16
Variance:	12	-2	0.16

Other Measures

Project Name Sustainability Cultural Indicators Program-2017 (SCIP-2017)

Project Mode Primary: Web Total of Modes: 1

Project Type Sponsored Projects **Project Status** Current

Budget ***Direct Budget:*** 73,274.00 ***Indirect Budget:*** 0.00 ***Total Budget:*** 73,274.00

Principal Investigator/Client John Callewart (UM-Graham Environmental Sustainability Institute)
Robert Marans (UM-Survey Research Center)

Funding Agency

IRB ***HUM#:*** 00068573 ***Period Of Approval:***

Project Team ***Project Lead:*** Donnalee Ann Grey-Farquharson
Budget Analyst: Carl S Remmert
Production Manager:
Senior Project Advisor: Stephanie A Chardoul
Production Manager: Andrew L Hupp
Production Manager:

Proposal #: no data

Description: The goal of the overall Sustainability Cultural Indicators Project (SCIP), a joint project of the Institute for Social Research (ISR) and the Graham Environmental Sustainability Institute (Graham), is to measure changes in sustainability-related knowledge, commitments, and practices in the University of Michigan (U-M) community over time. The principle component of SCIP is a large-scale annual survey, to be conducted with U-M students, faculty, and staff from 2012 to 2018.

SRO Project Period 07/2017 - 06/2018

Data Col Period

Security Plan NA

Milestone Dates

PreProduction Start: 07/01/2017

Pretest Start:

Pretest End:

Recruitment Start:

Staffing Completed:

GIT Start:

SS Train Start:

SS Train End:

DC Start: 01/16/2018

DC End: 02/22/2018

Other Project Team Members: Donnalee Grey-Farquharson - instrument revisions/project management
Andrew Hupp - methodological experimental design
Carl Remmert - financial support and analysis
Hueichun Peng - programming for dissertation research
Minako Edgar - sample prep, dataset creation, GIS analysis
Andrew Piskorowski - Paradata design
Dan Zahs - weighting and sampling support
Felicita Mittereder - analysis (PhD student implementing experiment for dissertation)
Campus Sustainability

Other Project Names:

Sample Mgmt Sys MSMS

Data Col Tool Blaise 5

Hardware NA

DE Software N/A

QC Recording Tool N/A

Incentive Yes, Other (A portion of R's (a raffle))

Administration SRO Group

Payment Type Other (Amazon gift code)

Payment Method Other (Amazon gift code sent via e-mail)

Report Period Sep, 2017 (SCIP-2017) **Project Phase** Planning

Risk Level On Track

Monthly Update 2017-09
SRO (Andrew H. and Donnalee) attending a meeting with the PIs and various stakeholders from across the university to discuss questionnaire items to be added and dropped for the coming data collection cycle. No decision have been made yet. Options are: 1) Drop content on items that have not seen little to any change over the prior 4 years data

collection and add (fewer) new content or 2) Keep the existing content and add new along with randomizing content to keep length down (most likely will go with option #1). It is planned that the questionnaire content will be finalized by mid-October so programming can begin.

The team continues to meet with PSM student Felicitas Mittereder on predicting breakoffs. This work is being funded by awards from the Cannell Fund and not SCIP.

Regular meetings with the PIs will begin in October. Donnalee is going to manage this wave of data collection with assistance from AH on the methodology and implementation aspects. She will be completing the monthly report beginning in October.

2017-08

No work was done in August. Donnalee will be coming on to the project as the manager. Andrew H. will provide oversight. They have a meeting scheduled to discuss the project when he returns from vacation. There is a meeting scheduled with the various UM stakeholders that have interest in the content of the SCIP on September 22. Andrew H. and Donnalee will attend. They will meet with the PIs (unscheduled) after that to discuss the 2017 design. Andrew H. will work with Donnalee to enter CRS projections in September.

2017-07

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

Special Issues

Cost

Oct 31, 2017

Total Cost to Date (Direct + Indirect):	519.38	
Estimated Cost at Completion (E\$AC):	68,742.53	
Total Budget:	73,274.00	
Variance (Budget minus E\$AC):	5,012.09	
Reason For Variance:	The BA has been out. Ryan has entered the initial projections. We are currently projecting an underrun. There is additional funding for Feli'sd (PSM) dissertation work (for Hueichun and Andrew P.) that is not part of SCIP funding (and not reflected in the cost projections).	

Projections

Oct 31, 2017

Dollars Projected For Month:	3,284.13	
Actual Dollars Used:	519.38	
Variance (Projected minus Actual):	2,764.75	
Reason For Variance:	Only minimal work and meetings occurred in September. Most of the work was related to Feli's dissertation work which is charged on another account.	

Measures

	Units Complete	RR	HPI
Current Goal:	6,000	30%	NA
Goal at Completion:			NA
Current actual:	NA	NA	NA
Estimate at Complete:			NA
Variance:			NA

Other Measures