

Survey Research Operations

Monthly Project Report

Sponsored Projects

October 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
(PSID MULT) PSID Multiplicity Screening
(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: ABCD is a longitudinal study of about 10,000 children from ages 9-10 through early adulthood to assess factors that influence individual brain development trajectories and functional outcomes. UM Dept of Psychiatry is one of 19 research sites across the country.

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

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

SRO Project Period 05/2016 - 03/2018

Data Col Period 05/2016 - 02/2018

Security Plan NA

Milestone Dates

PreProduction Start: 05/15/2016

Pretest End:

Staffing Completed: 05/20/2016

SS Train Start:

DC Start: 05/20/2016

Pretest Start:

Recruitment Start: 05/20/2016

GIT Start:

SS Train End:

DC End: 02/28/2018

Other Project

Team Members:

Other Project Adolescent Brain Cognitive Development

Names:

Sample Mgmt Sys NA

Data Col Tool NA

Hardware NA

DE Software NA

QC Recording Tool NA

Incentive NA

Administration NA

Payment Type NA

Payment Method NA

Report Period Oct, 2017 (ABCD)

Project Phase Implementing

Risk Level On Track

Monthly Update Clinic response is doing okay, but concern is that we have differential response (more A2 schools, for example, than schools that have greater diversity). Our emphasis through the end of the calendar year will be on promoting

response with select schools. So, we are shifting from recruiting more new schools to hosting information tables at parent-teacher conference nights and similar activities.

Special Issues

NONE

Cost

Oct 10, 2017

Total Cost to Date (Direct + Indirect): 195,485.00
Estimated Cost at Completion (E\$AC): 430,596.00
Total Budget: 430,596.00
Variance (Budget minus E\$AC): 0.00
Reason For Variance:

Projections

Oct 10, 2017

Dollars Projected For Month: 5,000.00
Actual Dollars Used: 6,200.00
Variance (Projected minus Actual): 0.00
Reason For Variance: Ramped up our activity now that schools are open and willing to send parent packets

Measures

	Units Complete	RR	HPI
Current Goal:	54		
Goal at Completion:	TBD		
Current actual:	78		
Estimate at Complete:	88		
Variance:			

Other Measures

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

Report Period	Oct, 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.</p> <p><input type="checkbox"/> Production data collection continues. We released sample replicates 27 and 28 this month, bringing the total number of released sample lines to 45,503.</p>		

- A total of 11,737 main Wave 1 interviews and 283 Phase 5 (end game) interviews have been completed as of October 26. Production updates are being provided weekly to the research team via email, and a summary of data collection results is included in this report.
- ODUSA address lookups for the Wave 1 sample have been completed this month.
- We submitted Wave 2 design descriptions to the PIs and the Army.
- We are developing the sample management rules for the Wave 2 contact protocol.
- We received final Wave 2 questionnaire changes from Harvard are working on programming the Wave 2 instrument in the latest version of Blaise.
- We submitted the annual IRB renewal for STARRS-LS and have begun working on the amendment for Wave 2, which will be submitted in November.
- We continued to work on the cost estimate for the New Soldier Sample Refresher study.
- Enclave user support continues. The completion date for the replacement server on the Enclave has been pushed back to December. STARRS-LS paradata to accompany last month's survey data load was placed on the Enclave this month.
- We are developing data cleaning procedures for several cases with special circumstances.

Special Issues

Areas of Risk, Mitigation Strategies:

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

- Respondent contact and participation.
 - o We continue to wait for the Army to obtain the address updates from the IRS system. While this is coming late for Wave 1, it will be helpful for Wave 2.
 - o We are using fairly optimistic response rate assumptions for Wave 2. We will monitor results closely in the first months of data collection, and will make adjustments to our procedures and/or projections where necessary.
- New technical systems.
 - o The upgrade of the Wave 2 survey instrument to the latest version of the Blaise data collection software has yielded some challenges this month. We are working closely with the software developer and will be receiving a beta version of the software upgrade that is should resolve the critical issues we found in the previous version.
 - o We continue to work with the development team for our sample management system, and prioritize our requests to ensure that development of the most important issues are fixed before Wave 2.
- 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
Oct 16, 2017

Total Cost to Date (Direct + Indirect):	6,412,589.00
Estimated Cost at Completion (E\$AC):	12,705,954.00
Total Budget:	12,738,233.00
Variance (Budget minus E\$AC):	32,279.00
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
Oct 16, 2017

Dollars Projected For Month:	312,952.00
Actual Dollars Used:	324,658.00
Variance (Projected minus Actual):	-11,706.00
Reason For Variance:	September was a three pay period month, a few of the hours were higher than projected. The overrun is 3.7% of this month's projected cost.

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 update reports to PIs (uploaded as separate files)

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#:
Project Team	Period Of Approval:
	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 End:

Staffing Completed:

SS Train Start:

DC Start:

Pretest Start:

Recruitment Start:

GIT Start:

SS Train End:

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	Oct, 2017 (CogEcon Web)	Project Phase	Initiation
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Risk Level Not Rated

Monthly Update Unfortunately the project is still encountering delays in starting due to the Clients negotiations with an outside vendor (Fee-X). It may be that if these negotiations aren't resolved the survey will be modified to remove the link to outside vendor (this will mean changes to consent, letters and application). Hopefully we will know soon the direction the client wishes to take-

Special Issues Still unclear whether all funds need to be expended by end of calendar year or if they can be used to complete the data collection (which has been delayed)

Cost Oct 31, 2017	Total Cost to Date (Direct + Indirect):	21,156.73
	Estimated Cost at Completion (E\$AC):	105,088.54
	Total Budget:	106,552.00
	Variance (Budget minus E\$AC):	1,464.46
	Reason For Variance:	

Projections Oct 31, 2017	Dollars Projected For Month:	20,677.10
	Actual Dollars Used:	15,964.33
	Variance (Projected minus Actual):	5,990.16
	Reason For Variance:	

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

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 Oct, 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
Oct 31, 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
Oct 31, 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:
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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	Oct, 2017 (HCAP 2016)	Project Phase	Closing
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Risk Level	Some Concerns
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Monthly Update	As of October 30th, there are 3,347 completed respondent interviews and another 3,184 informant interviews. The scheduled date to end production was 10/24 - a few lines with appointments and promise stayed open for several more days. Currently, all lines closed. Post production activity is underway and final data will be delivered the first
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week of November.

Current Response/Completion Rates		
Sample	Response Rate	Completion Rate
Priority Sample	64.2%	99%
Total Sample (all)	75%	100%

Some licensed tests will be re-scored - the approach to be decided by the Pls. SRO will need to secure resources to carry out the scoring s tasks.

Special Issues

Cost
Oct 31, 2017

Total Cost to Date (Direct + Indirect):	4,700,504.33
Estimated Cost at Completion (E\$AC):	4,685,635.61
Total Budget:	4,476,719.00
Variance (Budget minus E\$AC):	77,776.80
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
Oct 31, 2017

Dollars Projected For Month:	56,406.46
Actual Dollars Used:	41,540.05
Variance (Projected minus Actual):	14,866.41
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:	<p>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.</p>													
SRO Project Period	04/2015 - 06/2017													
Data Col Period	02/2016 - 04/2017													
Security Plan	NA													
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start: 04/01/2015</td> <td style="padding: 5px;">Pretest Start: 10/16/2015</td> </tr> <tr> <td style="padding: 5px;">Pretest End: 11/07/2015</td> <td style="padding: 5px;">Recruitment Start: 06/01/2015</td> </tr> <tr> <td style="padding: 5px;">Staffing Completed: 03/15/2016</td> <td style="padding: 5px;">GIT Start: 02/10/2016</td> </tr> <tr> <td style="padding: 5px;">SS Train Start: 02/12/2016</td> <td style="padding: 5px;">SS Train End: 04/24/2016</td> </tr> <tr> <td style="padding: 5px;">DC Start: 02/22/2016</td> <td style="padding: 5px;">DC End: 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													
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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	Oct, 2017 (HRS 2016)	Project Phase	Implementing
Risk Level	Some Concerns		
Monthly Update	<p>During the month of October, data collection for the new cohort and panel components continued. Non-final panel sample is being worked by the SSL and Field in an effort to boost the panel response rate as high as possible. The majority of 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 (i.e. release of LBBNER sample to field). In addition, new screening sample is being selected and prepared to release to field to address in</p>		

preparation for the new cohort continuation.

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

2018 Systems Development Milestones: (full report uploaded)

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

CAPI test – SurveyTrak/Blaise 5 – October 2017 with field interviewers (internal test has been completed).

Key decision – 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 Sep 30, 2017

Total Cost to Date (Direct + Indirect): 35,557,974.83
Estimated Cost at Completion (E\$AC): 40,397,074.78
Total Budget: 37,770,690.63
Variance (Budget minus E\$AC): -6,817,947.78
Reason For Variance: Projected cost to complete reflects the continuation of New Cohort data collection into 2018 in order to meet production targets. Adjustments in funding allocations will be made by next month. (There is funding to cover the variance.)

Projections Sep 30, 2017

Dollars Projected For Month: 996,059.12
Actual Dollars Used: 1,116,491.16
Variance (Projected minus Actual): -120,432.04
Reason For Variance: Overall, actual dollars for the month of September came in over projections. Iwer hours were a combined 4% high for the month, which caused our salary expenses to exceed projections by \$44,500 for the month. The overage was mostly from Panel iwer hours, New Cohort iwer hours were right on target. For non-salary, expenses exceeded projections by \$44,000. This was mainly due to the duplicate check batch of \$79,300 not being voided until the first week of October, so it did not hit in September as projected. The credit will come through in October and have pushed the projection forward.

Measures

	Units Complete	RR	HPI
Current Goal:	23,569	85%	7.45
Goal at Completion:	23,569	85	7.45
Current actual:	21,140	72%	8.8
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

<i>PreProduction Start:</i> 04/01/2016	<i>Pretest Start:</i> 10/24/2016
<i>Pretest End:</i> 12/31/2016	<i>Recruitment Start:</i> 06/01/2016
<i>Staffing Completed:</i> 05/02/2017	<i>GIT Start:</i> 04/30/2017
<i>SS Train Start:</i> 05/10/2017	<i>SS Train End:</i> 05/18/2017
<i>DC Start:</i> 05/22/2017	<i>DC End:</i> 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	Oct, 2017 (HCDC, H&C)	Project Phase	Implementing
Risk Level	<i>Some Concerns</i>		
Monthly Update	<p>During October 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. Prepared invoices. 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. Worked with vendors to specify and prepare kits for Quarter 3 interviewing Generated cost models and estimates for various cost cutting interventions; Created presentation for the models and discussed options to the broader HCHD research team. Specified work scope and worked to prepare budget for supplemental HUD funding. Modified recruitment materials according to PI preferences Finalized and submitted IRB amendment with recruitment materials updates, consent form modifications, and survey modifications for homelessness and shared housing arrangements. Tested new programming additions Monitored DBS collection. Prepared and implemented new review/retraining protocol Conducted quality control checks on data Reviewed draft deliverable from vendor scanning Child Daily Diaries Discussed cost control alternatives via administrative activities Supervised logging team on survey document and DBS logging <p>Task 2: Sampling</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> Monitored production progress versus sampling assumptions. Ran checks on previously selected Q3 population sample to ensure proper selection Monitored sample production and updated dashboards <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. <ul style="list-style-type: none"> Daily Diaries change from four to two diaries Observational options for homelessness/shared housing arrangements Changes in scripting in household roster section Inclusion of error checking on child birth date Changes in scripting in screener Added questions asking email address, cell phone number and permission to text when collecting contact information Spanish translation corrections Created paper questionnaire to collect missing questions for interviews where PCG provided the wrong DOB of a focal child <p>Task 4: CAI Programming</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> Programming updates for most recent IRB approvals <ul style="list-style-type: none"> Child Time Diaries change from four days to two days Spanish translation corrections 		

- o Changes in scripting in household roster section
- o Error checking on child birth date
- o Addition of email address, cell phone number and permission to text
- o Observations for homelessness
- Iterative testing/programming bug fixes on new additions

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
- o Created daily reports to monitor interviewer performance on DBS collection
- SurveyTrak
- o Added new result codes for call limit met, end of quarter close out
- 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

- Finalized training manual chapters, on-line learning modules and presentation slides for supplemental training
- Assembled material kits for training and certification round robin practices
- Reviewed and printed training and certification scripts
- Finalized conference facility preparation and plans
- Reviewed and scored interviewer home study assignments
- Finalized materials and Moodle programs for interviewer certification
- Conducted supplemental training Oct 13-21, 7 interviewers, 2 team leaders, 1 Production Coordinator

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.
- Distributed email notifications to voucher cases with email addresses. Responded to email contacts from respondents
- Conducted routine verification, quality control on completed interviews
- Reviewed all consent documents and respondent payment receipts.
- Developed participant list and sent emails to non-final voucher sample respondents for whom we have email addresses
- Cumulative production as of 10/31/2017:
- o Completed
 - ☐ 913 Screener interviews (with eligible respondents), identified 1629 ineligible households, 860 non-sample addresses, 303 refusals
 - ☐ 555 PCG interviews
 - ☐ 770 Child interviews

Task 9: Post Collection Processing

% Task Spent to Date

- 513 HH SAQs and 712 Child SAQs currently in the process of data entry
- Conducted quality checks on physical measures data
- Logged completed interview materials, dried blood spots. Reconciled incorrectly labeled or missing items.

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 October 5th, including SAQ data

Special Issues**Areas of Concern:**

- Hours per screener for the Voucher Sample are running significantly higher than budgeted due to sample quality issues. This is particularly true in Cleveland, where the sample addresses are much older, 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; Not Approved at this time)
- 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
Oct 13, 2017**

Total Cost to Date (Direct + Indirect): 4,251,910.00

Estimated Cost at Completion (E\$AC): 10,948,193.00

Total Budget: 10,743,019.00

Variance (Budget minus E\$AC): 205,174.00

Reason For Variance:

The voucher sample is not performing according to expectations - Voucher screeners are taking many more hours to complete than had been budgeted. Due to this, production is behind plans, and interviewing costs are higher than anticipated.

**Projections
Oct 13, 2017**

Dollars Projected For Month: 478,274.00

Actual Dollars Used: 428,048.00

Variance (Projected minus Actual): 50,227.00

Reason For Variance:

Hosting and travel expense for the interviewer training conducted in October have not yet hit the books. Respondent payments are running much lower than projected due to the slow pace of production.

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

Other Measures

Project Name HRS 2017 Consumption and Activity Mail Study (CAMS 2017)

Project Mode Primary: Mail Total of Modes: 1

Project Type Sponsored Projects **Project Status** Current

Budget ***Direct Budget:*** 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 Oct, 2017 (CAMS 2017) **Project Phase** Implementing

Risk Level On Track

Monthly Update Following the first mailing to 7,579 respondents at the end of September, logging work began in early October. A short training was conducted and production logging began in the first week of October. Logging work has been heavy over the first 4 weeks of production and significant time has been required for QC work and shipping of questionnaires to the HRS study staff. The second mailing was prepared from 10/19 to 10/24 and was mailed out on 10/25 to a subset of respondents who had not yet sent back completed questionnaires or were removed for other reasons between mailing 1 and 2.

Special Issues

No other issues at this time.

Cost**Sep 30, 2017***Total Cost to Date (Direct + Indirect):* 263,432.66*Estimated Cost at Completion (E\$AC):* 392,915.03*Total Budget:* 400,000.00*Variance (Budget minus E\$AC):* 4,767.97*Reason For Variance:* Adjustments to projections based on staff assigned and work in September.**Projections****Sep 30, 2017***Dollars Projected For Month:* 258,036.05*Actual Dollars Used:* 252,861.14*Variance (Projected minus Actual):* 5,174.91*Reason For Variance:* Pre-production work was not as extensive as expected in September and most hours were used during the week of the first mailing (9/25/17). Outside printing work to obtain materials for production was submitted and received in September and October but these costs will not hit until October and November.**Measures**

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

Other Measures

Project Name 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	Oct, 2017 (MTTS)	Project Phase	Closing
Risk Level	On Track		
Monthly Update	In October the SRC team participated in meetings with the research team, reviewed spending and adjusted projections, negotiated with EWB regarding work scope and planned spending, and prepared reports.		
Special Issues			
Cost			
Oct 13, 2017	Total Cost to Date (Direct + Indirect):	984,337.00	
	Estimated Cost at Completion (E\$AC):	1,013,307.00	
	Total Budget:	1,019,417.00	
	Variance (Budget minus E\$AC):	6,110.00	
	Reason For Variance:	Lower than anticipated enrollment in the video collection has led to an underrun.	
Projections			
Oct 13, 2017	Dollars Projected For Month:	6,749.00	
	Actual Dollars Used:	5,616.00	
	Variance (Projected minus Actual):	1,133.00	
	Reason For Variance:	SRC is awaiting the completion of the video collection at Harvard in order to complete weighting work on the project.	

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	Oct, 2017 (MTF Illume Web 2017)	Project Phase	Closing
Risk Level	Not Rated		
Monthly Update	<p>None response calling has ended and all web surveys were closed on 10/27. Data will be delivered by November 30th, 2018.</p> <p>A ballpark budget for 2018 was delivered to the PIs - no response from them as yet.</p>		
Special Issues			

Cost Oct 31, 2017	<i>Total Cost to Date (Direct + Indirect):</i>	107,285.45
	<i>Estimated Cost at Completion (E\$AC):</i>	120,180.47
	<i>Total Budget:</i>	163,886.06
	<i>Variance (Budget minus E\$AC):</i>	43,705.53
	<i>Reason For Variance:</i>	

Projections Oct 31, 2017	<i>Dollars Projected For Month:</i>	35,732.90
	<i>Actual Dollars Used:</i>	18,238.29
	<i>Variance (Projected minus Actual):</i>	17,494.61
	<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	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"> <tr> <td>PreProduction Start: 03/01/2011</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start: 06/01/2011</td> </tr> <tr> <td>Staffing Completed: 08/17/2011</td> <td>GIT Start: 09/13/2011</td> </tr> <tr> <td>SS Train Start: 09/15/2011</td> <td>SS Train End: 09/19/2011</td> </tr> <tr> <td>DC Start: 09/20/2011</td> <td>DC End: 09/07/2019</td> </tr> </table>			PreProduction Start: 03/01/2011	Pretest Start:	Pretest End:	Recruitment Start: 06/01/2011	Staffing Completed: 08/17/2011	GIT Start: 09/13/2011	SS Train Start: 09/15/2011	SS Train End: 09/19/2011	DC Start: 09/20/2011	DC End: 09/07/2019
PreProduction Start: 03/01/2011	Pretest Start:												
Pretest End:	Recruitment Start: 06/01/2011												
Staffing Completed: 08/17/2011	GIT Start: 09/13/2011												
SS Train Start: 09/15/2011	SS Train End: 09/19/2011												
DC Start: 09/20/2011	DC End: 09/07/2019												
Other Project Team Members:	Chrissy Evanchek--Budget Analyst												
Other Project Names:													
Sample Mgmt Sys	SurveyTrak												
Data Col Tool	Blaise 4.8												
Hardware	Tablet; [UM cell] Phone; Paper and Pencil												
DE Software	NA												
QC Recording Tool	N/A												
Incentive	Yes, R; Yes, Other (babysitting fee)												
Administration	SRO Group												
Payment Type	Cash, prepaid (\$5; \$40); Cash, post (\$40; \$60)												
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office												
Report Period	Oct, 2017 (NSFG 2010-2020)	Project Phase	Implementing										
Risk Level	On Track												
Monthly Update	<p>We are now in Week 5 of Q25, Screener Week. We are on track to end this quarter with the highest yield so far in Cycle 8. There are currently 839 main interviews and 3045 screeners completed. The average for this point in the quarter is 568 main and 2619 screeners, and 507 main and 2188 screeners average since the age range expansion. Main and Screener completion rates are also ahead for this point in the quarter and since the age range expansion. The completions rates are: Screener 64.1% this quarter, 62.7% average for this quarter, 55.0% since the age range expansion; Main 46.4% this quarter, 41.5% average for this quarter, 42.0% since the age range expansion. HPI is at 10.3, average for this point in the quarter is 10.7. In order to keep up with the high productivity level, more sample lines have been released this Quarter than ever in Cycle 8, totaling 5,915 lines released for screening. The average</p>												

number of lines released for this Quarter in the year is 5,070. Current production focus remains on screening throughout this week, unless lwers are ahead of their goal in which case the focus can shift to main interviewing. One explanation for higher yield is that 13 of 32 PSU's have 2 interviewers working instead of just one as usual. The first quarter of the year has historically been more productive. Also, attrition is occurring at a slower rate this quarter than usual. So far only 5 New Hires have attritted this quarter, all resignations. 4 were on PIPs and 1 had an unforeseen personal circumstance. We have decided to hold a March attrition training as 2 areas are completely unstaffed now. They are being traveled and will continue to be until they are staffed again. We are anticipating training ~10-15 although will monitor and evaluate this closely. The Phase Boundary experiment is on track to start in Q26. Double sample will begin in week 9 for 5 areas. NCHS will be having a funders meeting in November to discuss the next contract. ISR will not be in attendance as we usually are.

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
Oct 31, 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
Oct 31, 2017**

Dollars Projected For Month: 694,627.21
Actual Dollars Used: 701,932.65
Variance (Projected minus Actual): 7,305.44
Reason For Variance: More hours worked than projected.

Measures

	Units Complete	RR	HPI
Current Goal:	1500	68%	10.0
Goal at Completion:	5000	79%	10.0
Current actual:	839	57.1%	10.3
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 5 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>PreProduction Start:</td> <td>Pretest Start: 12/21/2016</td> </tr> <tr> <td>Pretest End: 01/03/2017</td> <td>Recruitment Start:</td> </tr> <tr> <td>Staffing Completed:</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start:</td> <td>SS Train End:</td> </tr> <tr> <td>DC Start: 09/01/2016</td> <td>DC End: 05/31/2018</td> </tr> </table>			PreProduction Start:	Pretest Start: 12/21/2016	Pretest End: 01/03/2017	Recruitment Start:	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start: 09/01/2016	DC End: 05/31/2018
PreProduction Start:	Pretest Start: 12/21/2016												
Pretest End: 01/03/2017	Recruitment Start:												
Staffing Completed:	GIT Start:												
SS Train Start:	SS Train End:												
DC Start: 09/01/2016	DC End: 05/31/2018												
Other Project Team Members:	<p>Wave 2 Team: Kyle Kwaiser (tech lead, data manager), Kathy LaDronka, Becky Loomis, Dolorence Okullo (data management), Hueichun Peng, Shaowei Sun</p> <p>Wave 1 Team: Larry Daher, Emmanuel Ellis, David Bolt, Kyle Goodman, Donnalee Grey-Farquharson, Kyle Kwaiser (tech lead, data manager), Becky Loomis, Max Malhotra, Shaowei Sun, Laura Yoder (data management)</p>												

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

Report Period	Oct, 2017 (AHRB)	Project Phase	Implementing
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Risk Level	On Track
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Monthly Update	In October we prepared for and held a meeting with the PI and their team (including their PNG Project Administrator) to present 3 options for the remaining 1 year of the project. One proposed idea was to slim down the W3 data collection as much as possible to allow enough money for a Wave 4 data collection, by eliminating the collection and payment for the neurocognitive tasks in addition to a pre-contact letter.
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Ultimately, the PI decided to go with the current W2 methodology of keeping both the survey and neurocognitive tasks in the Wave 3 data collection. W3 Timelines have been established and mirror the data collection periods from Wave 2 (W3 R1 starts on Feb 14 2018 and W3 R2/3 starts on May 1 2018). The only decision on protocol left to be made is whether or not we will include a \$2 bill with the pre-contact letter. However, since that letter will also contain the AHRB portal user id log in information and the fact that the letter will only be sent the day before the survey goes live (Feb 13 2018 and April 30 2018), it's hard to call it a pre-contact letter.

Wave 2 will close on Oct 30 and data delivery of both survey data and neurocognitive task details will follow shortly thereafter. The last RPay process will be run to generate checks for the remaining W2 respondents who have completed both parts of the study.

Draft pre-contact letters (including those that go to parents of minors in the study), email invitations, reminders and final email notices have been sent to the PI's team for review and approval in anticipation of filing an IRB amendment in mid-November.

Special Issues

Cost	Total Cost to Date (Direct + Indirect):	1,262,864.96
Oct 11, 2017	Estimated Cost at Completion (E\$AC):	1,451,969.93
	Total Budget:	1,427,000.00
	Variance (Budget minus E\$AC):	-24,969.93
	Reason For Variance:	

Projections	Dollars Projected For Month:	0.00
Oct 11, 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 Oct, 2017 (YRS) **Project Phase** Implementing

Risk Level On Track

Monthly Update Training was held in September.

Last minute changes/corrections in the instrument mean all sites must get IRB approval again and so enrollment is at

very slow pace (as of this date only 2 sites approved). The SSL is working hard to retain trained interviewers by scheduling on other projects.

Special Issues

Cost Oct 31, 2017	Total Cost to Date (Direct + Indirect):	1,113,985.14
	Estimated Cost at Completion (E\$AC):	1,967,671.81
	Total Budget:	1,979,245.00
	Variance (Budget minus E\$AC):	11,573.19
	Reason For Variance:	

Projections Oct 31, 2017	Dollars Projected For Month:	39,559.03
	Actual Dollars Used:	42,048.16
	Variance (Projected minus Actual):	-2,489.13
	Reason For Variance:	last minute changes in instrument led to more programming (for instrument and safety transfers)

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

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

Project Name Panel Study of Income Dynamics - Transition to Adulthood Study 2017 (PSID TAS 2017)

Project Mode Primary: Telephone Total of Modes: 1

Project Type Sponsored Projects **Project Status** Current

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

Principal Investigator/Client Narayan Sastry (SRC-PSID)

Funding Agency

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

Project Team ***Project Lead:*** 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 Oct, 2017 (PSID TAS 2017) **Project Phase** Implementing

Risk Level Not Rated

Monthly Update Decentralized staff of 28 IWers, 2 TLs and 1 PC were trained via Webinar and production officially launched October 3rd as expected.

The first 4 weeks have been strong, with many appts. We are also using Flexbooker, which has yielded 319 appts.

Regular meetings continue with technical staff, project team and TA Pls.

Evaluation and verification began.

Special Issues

Cost	<i>Total Cost to Date (Direct + Indirect):</i>	156,053.92
Oct 31, 2017	<i>Estimated Cost at Completion (E\$AC):</i>	1,812,303.34
	<i>Total Budget:</i>	1,904,835.00
	<i>Variance (Budget minus E\$AC):</i>	92,531.66
	<i>Reason For Variance:</i>	

Projections	<i>Dollars Projected For Month:</i>	0.00
Oct 31, 2017	<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	<table border="1" style="width: 100%;"> <tr> <td>PreProduction Start: 01/04/2016</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start: 03/24/2016</td> </tr> <tr> <td>Staffing Completed: 06/23/2017</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start: 06/01/2016</td> <td>SS Train End: 06/30/2017</td> </tr> <tr> <td>DC Start: 06/06/2016</td> <td>DC End: 09/19/2017</td> </tr> </table>			PreProduction Start: 01/04/2016	Pretest Start:	Pretest End:	Recruitment Start: 03/24/2016	Staffing Completed: 06/23/2017	GIT Start:	SS Train Start: 06/01/2016	SS Train End: 06/30/2017	DC Start: 06/06/2016	DC End: 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	Oct, 2017 (PSID-Imm)	Project Phase	Closing
Risk Level	On Track		
Monthly Update	Focus on project close-out documentation.		
Special Issues			
Cost			
Oct 31, 2017	Total Cost to Date (Direct + Indirect):	1,563,797.28	
	Estimated Cost at Completion (E\$AC):	1,576,135.53	
	Total Budget:	1,901,212.00	
	Variance (Budget minus E\$AC):	325,076.47	
	Reason For Variance:	Less programming, no new-hire recruitment, smaller in-person training, fewer lines--in fewer areas, fewer iwers	

Projections
Oct 31, 2017

Dollars Projected For Month: 12,354.63
Actual Dollars Used: 7,949.62
Variance (Projected minus Actual): 4,405.01
Reason For Variance: not enough manager availability

Measures

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

Other Measures

Project Name	PSID Multiplicity Screening (PSID MULT)												
Project Mode	Primary: Telephone	Secondary: Face to Face	Total of Modes: 2										
Project Type	Sponsored Projects	Project Status	Current										
Budget	Direct Budget: 340,754.00	Indirect Budget: 188,063.00	Total Budget: 528,817.00										
Principal Investigator/Client	Narayan Sastry (SRC)												
Funding Agency													
IRB	HUM#: HUM00062417	Period Of Approval:	3/13/17 - 3/12/18										
Project Team	Project Lead: Rachel Anne Orłowski Budget Analyst: Production Manager: Margaret Lavanger Senior Project Advisor: Stephanie A Chardoul Production Manager: Production Manager:												
Proposal #:	no data												
Description:	Continuation of the PSID (post-1997) New Immigrant Sample Refresher. Screening Family Units (that contain a parent, sibling, and/or child of New Immigrant Head or Spouse/Partner who completed Core 2017) to determine whether either the Head or Spouse/Partner is an immigrant born between 1960-1971 (i.e., HRS-2016 screening eligible age range) and moved to the U.S. after 1997. Eligible Family Units are invited to participate in PSID Core 2019.												
SRO Project Period	06/2017 - 05/2017												
Data Col Period	10/2017 - 04/2017												
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%;"> <tr> <td>PreProduction Start: 06/01/2017</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start: 07/05/2017</td> </tr> <tr> <td>Staffing Completed: 08/17/2017</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start: 10/16/2017</td> <td>SS Train End: 10/18/2017</td> </tr> <tr> <td>DC Start: 10/26/2017</td> <td>DC End:</td> </tr> </table>			PreProduction Start: 06/01/2017	Pretest Start:	Pretest End:	Recruitment Start: 07/05/2017	Staffing Completed: 08/17/2017	GIT Start:	SS Train Start: 10/16/2017	SS Train End: 10/18/2017	DC Start: 10/26/2017	DC End:
PreProduction Start: 06/01/2017	Pretest Start:												
Pretest End:	Recruitment Start: 07/05/2017												
Staffing Completed: 08/17/2017	GIT Start:												
SS Train Start: 10/16/2017	SS Train End: 10/18/2017												
DC Start: 10/26/2017	DC End:												
Other Project Team Members:													
Other Project Names:													
Sample Mgmt Sys	SurveyTrak												
Data Col Tool	Blaise 4.8												
Hardware	Laptop; [UM cell] Phone												
DE Software	NA												
QC Recording Tool	DRI-CARI												
Incentive	Yes, R; Yes, Other (Locator)												
Administration	SRO Group; ISR Group (PSID)												
Payment Type	Check, post (\$40); Cash, prepaid (\$10); Cash, post (\$40); Other (Non-monetary incentive)												
Payment Method	Check through STrak RPay System; Check through other system (PSID-RAPS); Interviewer payment of cash (n												

Report Period	Oct, 2017 (PSID MULT)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	Trained 8 interviewers, 1 locator, and 1 TL from 10/16 - 10/18. One interviewer did not pass the first two certifications and decided to remove herself from the study. Locator began her efforts the week before training. First sample release is 24 lines. The first mailing was sent on 10/23: 16 MULT R advance letters and 8 Core R locating letters. Sample was transferred to the field on 10/26.		
Special Issues			

Cost
Oct 31, 2017

Total Cost to Date (Direct + Indirect): 200,317.41
Estimated Cost at Completion (E\$AC): 527,656.22
Total Budget: 528,817.00
Variance (Budget minus E\$AC): 1,160.78
Reason For Variance: A lot of uncertainty

Projections
Oct 31, 2017

Dollars Projected For Month: 66,127.30
Actual Dollars Used: 68,997.85
Variance (Projected minus Actual): -2,870.55
Reason For Variance: Training travel was higher than expected.

Measures

	Units Complete	RR	HPI
<i>Current Goal:</i>			
<i>Goal at Completion:</i>			
<i>Current actual:</i>	2	8%	6.9
<i>Estimate at Complete:</i>			
<i>Variance:</i>			

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
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												
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	Oct, 2017 (SWEL)	Project Phase	Implementing										
Risk Level	Not Rated												
Monthly Update	The SWEL Pilot, carried out by the LCD project team has restarted on 10/25 - we aim to recruit 2 - 4 participants per week and wrap up in 5 - 6 weeks (by end of year).												

The 2nd phase of the pilot is critical in determining whether Caretaker works as a device to collect ongoing blood pressure readings.

Other parts / devices of the study's data collection protocol (periodic surveys, BodyGuardian Heart) are set and will require only small adjustments for production.

We plan to staff 6 on-staffers. DCO is confirming options.

Work started on data collection protocol.

We should have a laptop configured with MSMS DCA for testing any moment now. First draft of Baseline (CAPI) will be sent to the client next week (11/6).

Per SWEL Tech lead: SRO is assuming cost for running HoltriT messaging app (TSG has more updates on this topic). This solves licensing issues with the app and clears SWEL for using the app for the study in 2018.

Re-budget memo has been accepted by the client -- new project budget will be reflected shortly in CRS.

Special Issues

Cost

Sep 30, 2017

Total Cost to Date (Direct + Indirect):	142,445.66
Estimated Cost at Completion (E\$AC):	683,647.00
Total Budget:	683,647.00
Variance (Budget minus E\$AC):	0.00
Reason For Variance:	Note: project has been re-budgeted but changes are not yet applied in CRS

Projections

Sep 30, 2017

Dollars Projected For Month:	22,651.17
Actual Dollars Used:	14,793.86
Variance (Projected minus Actual):	7,857.31
Reason For Variance:	Pilot was on hold to reconfigure the devices used to measure blood pressure.

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	Oct, 2017 (SCA 2017)	Project Phase	Implementing
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Risk Level*Attention!***Monthly Update**

SCA completed its October study a day early, finishing with 6042 completed interviews with the desired split: 403 RDDs and 202 Recons. This month the instrument length was again longer, at 33.9 minutes in length, and this was reflected in both the HPI of 3.80 and the larger amount of interviewer hours needed, 2296.3. SCA delivered a solid prelim total of 419 completes, assisted by an interviewer bonus that kept attrition low. This month our recon dials average dropped back down to an average level, but the addition of six new interviewers was felt in our dials per hour, which were lower than they have been in a number of months. SCA hired and trained seven new interviewers in October, but ultimately only four were cleared for production. SCA also posted for field interviewers to potentially remote in and work on the project, as a way of trying to both supplement and stabilize the interviewer corps, as people leaving for other jobs continues to be an issue. This posting engendered at great deal of interest, and those applicants are now being reviewed.

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 annual budget, and each additional training only increases this disparity. At this point we expect that we have done our last local training for the year.

Cost**Oct 09, 2017**

Total Cost to Date (Direct + Indirect): 810,491.36
Estimated Cost at Completion (E\$AC): 1,043,556.20
Total Budget: 859,872.00
Variance (Budget minus E\$AC): -183,684.20
Reason For Variance: Interviewer hours continue to run much higher than expected.

Projections**Oct 09, 2017**

Dollars Projected For Month: 69,964.00
Actual Dollars Used: 87,365.95
Variance (Projected minus Actual): -17,401.95
Reason For Variance: Higher training costs this month and additional interviewer hours.

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:	600	8	3.60
Current actual:			
Estimate at Complete:	64	7	3.80
Variance:	4	-2	0.20

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 Oct, 2017 (SCIP-2017) **Project Phase** Planning

Risk Level On Track

Monthly Update 2017-10

Final figures will be updated once October business is closed. SRO (Andrew and Donnalee) attended two meetings with PIs and one other stakeholder to discuss questionnaire content, initial respondent contact strategy, delivery date for survey changes/specifications, and production start date. The UM President's message/letter will now have an

embedded link to the survey. As well, the "celebrity" video will be embedded in the invitation. Specifications delivery date was set for the end of October and that has been met - both Faculty/Staff and Student surveys specifications have been delivered. Option 1 below was chosen in terms of questionnaire content. Production is set to begin Wednesday January 17th, 2018 and run until spring break. Three reminders will be sent.

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

Sep 30, 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

Sep 30, 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