

# ***Survey Research Operations***

## ***Monthly Project Report***

### ***Sponsored Projects***

***April 2013***



## Sponsored Projects

(Army STARRS) *Army Study to Assess Risk and Resilience in Servicemembers*  
 (CogUSA Supp) *NGCS Supplement to Cognition and Aging in the USA*  
 (DUST II 2013) *Health and Daily Life*  
 (HealthDisp) *Health Disparities*  
 (HRS 2012) *Health and Retirement Study*  
 (HRS Internet 2013) *HRS Internet 2013*  
 (HRS Screening Initiative) *HRS Screening Initiative*  
 (HRSVA) *HRS-VA Data linkage Project - HRS Veterans Administration Consent Collection Project*  
 (IMAK-R) *Interactive Multi-Media Assmt of Tchrs' Knowledge*  
 (IMDU) *Intensive Measurement of Drug Use during Transition to Adulthood*  
 (iPhone) *Responding to Surveys on Mobile Multimodal Devices*  
 (LMT MS) *Math Solutions*  
 (MANCS) *National Children's Study*  
 (MCEE) *Michigan Council on Educator Effectiveness*  
 (MDRC) *MDRC - Reading Partners Program Evaluation Project*  
 (MRRS III) *Effects of Recession and Economic Stimulus in Southeast Michigan Wave III*  
 (MTF BY 2013) *Monitoring the Future Base Year 2013*  
 (MTF NR 2013) *MTF Non-response 2013*  
 (MTF-WPSP) *Monitoring the Future Web Programming and Survey Pilot*  
 (NSFG 2010-2020) *National Survey of Family Growth*  
 (PSID 2013) *Panel Study of Income Dynamics 2013 (Family Economics Study)*  
 (SCA 2013) *Surveys of Consumer Attitudes*  
 (SCIP) *Sustainability Cultural Indicators Project*  
 (SHOS-B) *Army STARRS SHOS-B*  
 (TA 2013) *Transition to Adulthood (2013)*  
 (Transcript Study) *Impact of the Michigan Merit Curriculum & Michigan Promise Scholarship on Studen*  
 (UMCOP Alum Study) *UM College of Pharmacy Alumni Study*

Project Name	Army STARRS SHOS-B (SHOS-B)				
Project Mode	Primary: Telephone		Secondary: Web	Total of Modes: 2	
Project Type	Sponsored Projects			Project Status	Current
Budget	Direct Budget:	918,952.00	Indirect Budget:	238,927.52	Total Budget: 1,157,879.52
Principal Investigator/Client					
Project Team	Project Lead:	Nancy J Gebler			
	Budget Analyst:	Heather Barrus			
	Production Manager:	Lisa J Carn			
	Senior Project Advisor:				
	Production Manager:	Margaret Lee Hudson			
	Production Manager:				
Description:	<p>SHOS-B stands for Solder Health Outcomes Study B. The primary research aim addressed by SHOS-B is to find the risk and protective factors for suicide death among Army Soldiers. SHOS-B will assess potential risk and protective factors from multiple domains including: the presence and accumulation of mental disorders, receipt of psychological treatment, developmental history and medical family history, the experience of specific military or general life stressors, and recent experiences/state of mind prior to death.</p> <p>The Soldier Health Outcomes Study B (SHOS-B) represents the psychological autopsy component of the Army STARRS project and broadly aims to identify risk and protective factors for suicide among Army Soldiers. SHOS-B is the study of those Soldiers who have died by suicide while on active duty in the Army. Soldiers who are regular Army, as well as Soldiers who are Reserve and National Guard are included in the study.</p> <p>A "psychological autopsy" is a term for a detailed and broad investigation of a person and the circumstances surrounding that person's death. It is frequently used if the death was from suicide. The investigators attempt to reconstruct what the person thought, felt, and did before death, based on information gathered from personal documents, police reports, medical and coroner's records, and interviews with families, friends and others who had contact with the person before death.</p> <p>There are many advantages to using psychological autopsy. These studies aim to reconstruct an individual's psychological makeup (e.g., thoughts, feelings, behaviors, intentions, motivations, life circumstances), identify risk factors for death, and understand the mode and details of the suicidal behavior. Psychological autopsy studies offer a unique opportunity to gather information on a number of areas linked to suicide that are not generally accessible to epidemiological studies.</p> <p>In addition to the strengths of psychological autopsy studies in general, SHOS-B is unique relative to other Army STARRS components as it is the only component of the study to obtain new data on risk and protective factors for suicide among Soldiers who have recently died by suicide. SHOS-A will collect information on risk and protective factors from recent suicide attempters (a group known to differ somewhat from those who actually die by suicide), and the aggregate database component will examine information about risk and protective factors available among Army records.</p> <p>The SHOS-B study seeks to recruit and interview two Informants (a next of kin and an Army Supervisor) for each Soldier who has died. The research team will also examine administrative data for the Soldiers, in order to better understand the circumstances of that Soldier's time in the Army, and subsequent death.</p> <p>SHOS-B is a case/control study. For every Case Soldier (a Soldier who has died), we will recruit two Control Soldiers. These will be Soldiers who may have similar backgrounds and/or experiences but have not died. SHOS-B will interview two Informants (next of kin and Army Supervisor) for each Control Soldier. The inclusion of this control group allows for the possibility of assessing which risk factors are most linked with suicide. In other words, we will compare the two groups of Soldiers to determine what leads some Soldiers to be more resilient to experiences common to Soldiers, and what decreases resilience in others.</p> <p>The SHOS-B project is necessary to provide previously unavailable information about a wide range of factors that may be useful in better understanding and predicting suicide death among Army Soldiers. Ultimately, we hope that this information will help to prevent unnecessary deaths among Soldiers.</p>				
Project Period	01/2010 - 06/2014			Proposal No:	
Data Collection	03/2012 - 12/2013				

## 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

**Report Period** Apr, 2013 (SHOS-B) **Project Phase** Initiation  
**Monthly Update** Update included in Army STARRS report.

## Special Issues

**Cost**  
**May 31, 2013**

<b>Total Cost to Date (Direct + Indirect):</b>	0.00
<b>Estimated Cost at Completion</b>	0.00
<b>Total Budget:</b>	1,157,879.52
<b>Variance (Budget minus E\$AC):</b>	0.00

## Measures

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

## Other Measures

**Project Name** Army Study to Assess Risk and Resilience in Servicemembers (Army STARRS)  
**Project Mode** Primary: Class SAQ Secondary: Mixed Total of Modes: 2  
**Project Type** Sponsored Projects **Project Status** Current  
**Budget** **Direct Budget:** 24,375,004.00 **Indirect Budget:** 6,332,159.00 **Total Budget:** 30,707,164.00  
**Principal Investigator/Client** Steve Heeringa (University of Michigan)

**Project Team**

<b>Project Lead:</b>	Nancy J Gebler
<b>Budget Analyst:</b>	Mary Anne Kern
<b>Production Manager:</b>	Dante Vasquez
<b>Senior Project Advisor:</b>	Beth-Ellen Pennell
<b>Production Manager:</b>	Margaret Lee Hudson
<b>Production Manager:</b>	Andrew L Hupp

**Description:** The Study to Assess Risk and Resilience in Service Members (STARRS) is the largest study of suicide and mental health among military personnel ever undertaken. The purpose of the collaborative study is to identify modifiable risk and protective factors and moderators of suicidal behavior, to help inform the Army's ongoing efforts to prevent suicide and improve Soldiers' overall psychological health and functioning. To do this, investigators from the Uniformed Services University of the Health Sciences (USUHS), the University of Michigan, Harvard Medical School, Columbia University, and the National Institute of Mental Health will conduct an epidemiologic study of mental health, psychological resilience, suicide risk, suicide-related behaviors, and suicide deaths in the Army. The study will evaluate representative samples of Soldiers across all phases of Army service, both retrospectively and prospectively.

**Project Period** 07/2009 - 06/2014 **Proposal No:** 09-0046  
**Data Collection** 01/2011 - 12/2013

## 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** Lead Team: Mary Kern; Barbara Lohr\_Ward, Lisa Holland, Lisa Wood, Kathy LaDronka, Margaret Hudson, Andrew Hupp, ZoAnne Balckburn, Meredith House, Dante Vasquez, Lisa Lewandowski-Romps, LaMont Manley, Louis Daher.

**Report Period** Apr, 2013 (Army STARRS) **Project Phase** Initiation  
**Monthly Update** Update info given directly to Admin.

**Special Issues**

**Cost**  
**May 31, 2013**

<b>Total Cost to Date (Direct + Indirect):</b>	0.00
<b>Estimated Cost at Completion</b>	0.00
<b>Total Budget:</b>	30,707,164.00
<b>Variance (Budget minus E\$AC):</b>	0.00

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

**Other Measures**

**Project Name** Effects of Recession and Economic Stimulus in Southeast Michigan Wave III (MRRS III)

**Project Mode** Primary: Telephone Secondary: Face to Face Total of Modes: 2

**Project Type** Sponsored Projects **Project Status** Current

**Budget** **Direct Budget:** 553,930.00 **Indirect Budget:** 75,000.00 **Total Budget:** 628,930.00

**Principal Investigator/Client** Sheldon Danziger (University of Michigan National Poverty Center)  
 Kristen Seefeldt (University of Michigan School of Social Work)  
 Sarah Burgard (University of Michigan School of Social Work)

**Project Team** **Project Lead:** Jennifer C Arrieta  
**Budget Analyst:** Christine Evanchek  
**Production Manager:** Dianne G Casey  
**Senior Project Advisor:** Kirsten Haakan Alcser  
**Production Manager:**  
**Production Manager:**

**Description:** - aka Michigan Recession and Recovery Study (MRRSIII)

The purpose of this project is to explore who is most negatively affected by the economic crises and who benefits most from the economic stimulus package on a variety of dimensions. SRO will be responsible for a 68-minute survey to approximately 767 respondents (who participated in the wave 2 interview) of an expected sample size of 847 respondents from within the Wayne, Oakland, and Macomb tri-county area. When respondents are within a 50 mile radius of the tri-county area, they will be given the option of being interviewed in-person or by telephone. We will attempt to conduct telephone interviews with respondents located outside of the area.

**Project Period** 03/2013 - 02/2014 **Proposal No:** #13-0019R01  
**Data Collection** 06/2013 - 10/2013

**Milestone Dates**

<b>PreProduction Start:</b> 03/05/2013	<b>Pretest Start:</b>
<b>Pretest End:</b>	<b>Recruitment Start:</b> 03/15/2013
<b>Staffing Completed:</b> 04/16/2013	<b>GIT Start:</b>
<b>SS Train Start:</b> 04/11/2013	<b>SS Train End:</b> 04/12/2013
<b>DC Start:</b> 06/17/2013	<b>DC End:</b> 10/31/2013

**Other Project Team Members** Jeff Smith - Tech Lead/STrak Programmer  
 Jim Hagerman - Blaise Programmer  
 Holly Ackerman - WebTrak/Weblog Programmer  
 Data Manager - Jennie Williams  
 Help Desk Supervisor - Genise Pattullo  
 Help Desk Lead - Deb Wilson  
 Instrument Testing - ZoAnne Blackburn  
 Tech Specs/Project Assistant - Jeannie Baker

**Report Period** Apr, 2013 (MRRS III) **Project Phase** Planning

**Monthly Update** During the month of April, instrument programming and CTT testing continued. Sample management system development began and weekly tech meetings were held to discuss project needs, timeline, and concerns. The project was set up in CRS and cost projections were provided to the budget analyst. The kick-off meeting, originally scheduled for March, was held in mid-April and planning for training began. Field staff decisions were finalized based on results of recruitment effort. Staff will consist of 13 interviewers, 2 TL, and 1 Tracker (all on-staff iwers). The majority of the staff has at least one wave of MRRS experience. The MRRS newsletter was mailed to the full sample on April 29th. Late April the lead project manager was off work due to health reasons but the production manager and MRRS team did a great job working together and with the client to keep the study on schedule.

**Special Issues** Concerns for the study include:  
 Interview length may be longer than projected based on review of changes to instrument which could lead to cost over-runs if the interview length is indeed longer than projected.  
 Managing multiple funding sources including waiting for the remainder of the SRO funds to be delivered. As of April, we are expecting another \$75,000 direct from MacArthur Foundation and the remaining funds from U-M OVPR.  
 The budgeted scope of work requires a short field period while aiming to obtain a high response rate. Obtaining this response rate may require more effort, including a longer data collection period.  
 Mid-April, the client requested SRO to look for ways to save \$10,000 to \$20,000 direct (in particular through training costs).

**Cost**  
**Apr 30, 2013**

<b>Total Cost to Date (Direct + Indirect):</b>	29,556.06
<b>Estimated Cost at Completion</b>	628,930.00
<b>Total Budget:</b>	628,930.00
<b>Variance (Budget minus E\$AC):</b>	0.00

Measures	Units Complete	RR	HPI
<b>Current Goal:</b>			
<b>Goal at Completion:</b>	767	90%	4.34
<b>Current actual:</b>			
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

#### Other Measures

**Project Name** Health and Daily Life (DUST II 2013)

**Project Mode** Primary: Telephone Total of Modes: 1

**Project Type** Sponsored Projects **Project Status** Current

**Budget** **Direct Budget:** 744,423.00 **Indirect Budget:** 459,804.00 **Total Budget:** 1,204,227.00

**Principal Investigator/Client** Vicki Freedman (UM, ISR, SRC)

**Project Team**

**Project Lead:** Robert Lee  
**Budget Analyst:** William Lokers  
**Production Manager:** Russell W Stark  
**Senior Project Advisor:** Stephanie A Chardoul  
**Production Manager:** \_UnAssigned  
**Production Manager:** \_UnAssigned

**Description:** This project is a supplement to the 2013 Panel Study of Income Dynamics. Respondents from PSID 2013, fitting the proper age criteria, will comprise the survey sample. The PSID Staff will be responsible for selecting the sample that meets the demographics desired for this project. The sample will consist of both coupled households, and single person households. For all sample members, interviews will be obtained for one random weekday and one random weekend day. Among coupled households, interviews will be obtained for husbands and wives on the same random weekday and random weekend day. In total, 4,698 diaries will be completed. Two instruments will be administered - the first interview will have a CATI Time Diary averaging 40 minutes in length and a Blaise instrument averaging 15 minutes in length (55 minute total); the second interview will have a second Time Diary and a smaller Blaise instrument that, combined, will average 40 minutes. Each respondent will be interviewed twice in the course of the study, once on a weekday and once on a weekend day. For each respondent, one interview will average 50 minutes and the second will average 40 minutes. The data collection period is from June, 2013 to January, 2014. All interviews will be conducted by telephone in the Survey Services Lab (SSL) using a Blaise instrument, using SurveyTrak on PC's.

**Project Period** 01/2013 - 04/2017  
**Data Collection** 06/2013 - 01/2014

**Proposal No:**

**Milestone Dates**

**PreProduction Start:**01/01/2013  
**Pretest End:**05/02/2013  
**Staffing Completed:**05/31/2013  
**SS Train Start:**06/04/2013  
**DC Start:**06/10/2013

**Pretest Start:**04/11/2013  
**Recruitment Start:**03/15/2013  
**GIT Start:**06/03/2013  
**SS Train End:**06/06/2013  
**DC End:**01/31/2013

**Other Project Team Members**

Jas Sokhal, Tech Lead; Jeff Smith (SurveyTrak), Jim Hagerman (Blaise), Holly Ackerman (WebTrak), Genise Pattullo (Help Desk), Minako Edgar (Data Ops), Beth Jones (Site Coordinator)

**Report Period**  
**Monthly Update**

Apr, 2013 (DUST II 2013) **Project Phase** Planning  
 In the month of April the development of the technical tools needed for the project continued in and were finalized for the the Pretest. Pretest training was conducted April 8-9. Pretest interviewing was conducted from April 18 through the end of the month. SSL continued recruitment for its staffing needs for the Production phase of the project. Regular meetings between the PI and the Survey Director were held.

**Special Issues**

**Cost**  
**Apr 30, 2013**

**Total Cost to Date (Direct + Indirect):** 179,718.43  
**Estimated Cost at Completion** 1,204,227.00  
**Total Budget:** 1,204,227.00  
**Variance (Budget minus E\$AC):** 0.00

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>	1,515	80%	8.99
<b>Goal at Completion:</b>	1,515	80%	8.99
<b>Current actual:</b>	0	0%	0
<b>Estimate at Complete:</b>	1,515	80%	8.99
<b>Variance:</b>	0	0.00%	0.0

**Other Measures**

Note that the completion goal of 1,515 and the HPI goal of 8.99 are based on Family Units (FU) rather than on individuals. The combination of coupled households and single ones should yield approximately 4,698 completed diaries.

**Project Name** Health and Retirement Study (HRS 2012)  
**Project Mode** Primary: Face to Face Secondary: Telephone Total of Modes: 3  
**Project Type** Sponsored Projects **Project Status** Current  
**Budget** **Direct Budget:** 13,160,794.00 **Indirect Budget:** 4,737,885.00 **Total Budget:** 17,898,679.00  
**Principal Investigator/Client** David Weir (UM, ISR, SRC)  
 Mary Beth Ofstedal (UM, ISR, SRC)  
 Kenneth Langa (UM, ISR, SRC)  
**Project Team** **Project Lead:** Heidi Marie Guyer  
**Budget Analyst:** Jeffrey Keeler  
**Production Manager:** Stephanie Sullivan  
**Senior Project Advisor:** Mary P Maher  
**Production Manager:** Rebecca Gatward  
**Production Manager:** Robert Lee

**Description:**

The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. A series of physical measures and biomarkers are collected with half of all living respondents each wave as well as a self-administered questionnaire. In 2012, panel members asked to participate in the PM/Bio & SAQ will be asked again, as well as the 50% of baseline respondents who were not asked in 2010/11 as part of their baseline interview. Additionally, permission to link to Social Security Administration records, Medicare and Medicaid are obtained. In 2012, consent to link to Veterans Administration (VA) records will be requested of all veteran respondents (n~6,000). The HRS 2010 sample will include approximately 26,500 respondents. The total budget amount reflected here represents pre-production, main data collection and post-production cost estimates.

**Project Period** 08/2011 - 04/2012  
**Data Collection** 04/2012 - 02/2013

**Proposal No:** 12-0044

**Milestone Dates**

<b>PreProduction Start:</b> 08/01/2011	<b>Pretest Start:</b> 01/30/2012
<b>Pretest End:</b> 02/15/2012	<b>Recruitment Start:</b> 11/06/2011
<b>Staffing Completed:</b> 03/29/2012	<b>GIT Start:</b> 04/15/2012
<b>SS Train Start:</b> 04/19/2012	<b>SS Train End:</b> 04/23/2012
<b>DC Start:</b> 04/24/2012	<b>DC End:</b> 01/31/2013

**Other Project Team Members**

Maryam Buageila, Erin Burgess, Dianne Casey, Piotr Dworak, Rebecca Gatward, Heidi Guyer, Frost Hubbard, Bob Lee, Heather Rejto, Andrea Scott, Stephanie Sullivan

**Report Period**  
**Monthly Update**

Apr, 2013 (HRS 2012) **Project Phase** Closing  
 Interviewing closed in April. SAQ follow-ups continued throughout the month. Interviewing staff consolidations were made and all lines were closed out. Final deliverable preparations were begun.

**Special Issues**

**Cost**  
**Apr 30, 2013**

<b>Total Cost to Date (Direct + Indirect):</b>	18,291,525.00
<b>Estimated Cost at Completion</b>	17,914,411.00
<b>Total Budget:</b>	17,898,679.00
<b>Variance (Budget minus E\$AC):</b>	89,845.00

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>	21,678	87.0	7.72
<b>Goal at Completion:</b>	21,790	88.0%	7.6
<b>Current actual:</b>	21,886	88.8	7.43
<b>Estimate at Complete:</b>	21,886	88.8%	7.43
<b>Variance:</b>	0	-0.08%	-0.17

**Other Measures**

**Project Name** Health Disparities (HealthDisp)  
**Project Mode** Primary: Web Total of Modes: 1  
**Project Type** Sponsored Projects **Project Status** Current  
**Budget** **Direct Budget:** 8,180.00 **Indirect Budget:** 4,265.00 **Total Budget:** 12,466.00  
**Principal Investigator/Client** Dr. James Jackson (Research Center for Group Dynamics - ISR)

**Project Team**  
**Project Lead:** Andrew L Hupp  
**Budget Analyst:** Andrew L Hupp  
**Production Manager:**  
**Senior Project Advisor:** Stephanie A Chardoul  
**Production Manager:**  
**Production Manager:**

**Description:** The study involves recruiting patients participating in Cardiac Rehab at the UM Hospital. Project staff will collect biological measures, extract information from patient records and administer a web based survey. SRO's involvement is in developing the web based instrument and providing support once the survey is launched.

**Project Period** 01/2009 - 06/2013

**Proposal No:** 09-0007

**Data Collection**

**Milestone Dates**

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

**Other Project Team Members**

Marta Murray Close, Paul Schulz



<b>Report Period</b>	Apr, 2013 (HealthDisp)	<b>Project Phase</b>	Implementing
<b>Monthly Update</b>	<p>The project staff tested the latest version of the instrument and has given a list of items they want changed/updated/fixed. Those changes will be made. The project staff asked the SPA in a meeting about the follow-up instruments (which they had not provided) and a budget for a new project with a similar instrument.</p> <p>Most of the changes/updates/fixes have been made. The project staff will be given a new version to test in March. Paul Schulz will be coming on to finish any fixes after this and will work on the subsequent waves of the instrument. A meeting is scheduled with the project staff, Andrew and Paul to transition the work of finalizing the main instrument and begin work on the follow-up instruments.</p> <p>Andrew and Paul met with the project staff about the new changes and fixes that are still needed and the next follow-up survey that needs to be programmed. Paul is taking over the programming moving forward. Paul will make the changes and give a testing version to the project staff. Once the initial instrument is finalized the work on the follow-up instrument will begin. The project staff has been learning about the instrument as they interview participants using paper surveys which have prompted changes in the programming of things they had not foreseen. The follow-up instrument is largely based on the main instrument. Once everything is working there, that instrument will be used as the basis for the follow-up instruments.</p> <p><b>May '12</b></p> <p>Paul continues to provide testing version and makes corrections and additions as necessary as they test. The main instrument is close to being ready. After that Paul will begin programming the follow-up instruments (which are largely subsets of the main instrument. Stephanie C. has been working with the client on all of the scope changes and getting more funds from them.</p> <p><b>June '12</b></p> <p>Paul continues to provide testing version and makes corrections and additions as necessary as they test. The main instrument is close to being ready. After that Paul will begin programming the follow-up instruments (which are largely subsets of the main instrument. Stephanie C. has been working with the client on all of the scope changes and getting more funds from them. They have agreed to provide more funds, but they are awaiting all of the funds from SPH.</p> <p><b>July '12</b></p> <p>Paul has most of the instrument programmed. There are a few remaining items that need to be fixed. Once those items work, Paul will begin working on the follow-up instruments. Stephanie C. has been working with the client on all of the scope changes and getting more funds from them. They have agreed to provide more funds, but they are awaiting all of the funds from SPH.</p> <p><b>August '12</b></p> <p>Paul has most of the instrument programmed. The research team continues to make changes to the instrument. Once those items have been implemented, Paul will begin working on the follow-up instruments. Stephanie C. has been working with the client on all of the scope changes and getting more funds from them. They have agreed to provide more funds (cover our overrun and provide additional money), but they are awaiting all of the funds from SPH.</p> <p><b>September '12</b></p> <p>Paul has most of the instrument programmed. The research team continues to make changes to the instrument. Once those items have been implemented, Paul will begin working on the follow-up instruments. Stephanie C. has been working with the client on all of the scope changes and getting more funds from them. They have agreed to provide more funds (cover our overrun and provide additional money), but they are awaiting all of the funds from SPH.</p> <p><b>October '12</b></p> <p>Paul has most of the instrument programmed. The research team continues to make changes to the instrument. Once those items have been implemented, Paul will begin working on the follow-up instruments. Stephanie C. has been working with the client on all of the scope changes and getting more funds from them. They have agreed to provide more funds (cover our overrun and provide additional money), but they are awaiting all of the funds from SPH. Andrew spoke with the research team and they have provided SRO with access to an account on the RCGD side for Paul to charge to. We will be able to move the overrun to their accounts once they have their year 3 funding from SPH.</p> <p><b>November/December '12</b></p> <p>Paul made the last few updates to the instrument. The project staff tested and signed off on the production instrument. Paul worked with them on the best way to handle loading the sample and is available to answer questions. He has begun working on the follow-up instruments now that they have signed off on the base instrument.</p> <p><b>January '13</b></p> <p>Paul has been working on the Wave 2 follow-up instrument. That is close to being finished with a few changes expected after further testing has occurred. After that he will program the next two waves which are based on the Wave 2 instrument with only minor wording changes expected. All time is being charged to a project staff account. I spoke with the financial person on their side about the overrun. They will roll the SRO balance up into the RCGD</p>		

balance thereby absorbing the overdraft.

February '13

Paul provided the Wave 2 instrument and has been working on the Wave 3 instruments. The client has come back with changes to the Wave 1 instrument they would like made. Time continues to be charged directly to project accounts. We have been in contact about absorbing the SRO overrun.

March '13

The Wave 3 instrument has been provided for testing. A bug in the medication grid is being fixed. Next month work on the Wave 4 instrument should begin. Time continues to be charged directly to project accounts. We have been in contact with the project staff about them absorbing the SRO overrun.

April '13

The bug in the medication grid was fixed and work on the Wave 4 instrument has begun. Time continues to be charged directly to project accounts. We have been in contact with the project staff about them absorbing the SRO overrun.

#### Special Issues

This project has been slow to get started. The development time for the questionnaire was quite long. The project shows a slight overrun. A staff member not working on this project mistakenly charged time. That time was be removed.

<b>Cost</b>		
<b>Apr 30, 2013</b>	<b>Total Cost to Date (Direct + Indirect):</b>	14,399.95
	<b>Estimated Cost at Completion</b>	14,399.95
	<b>Total Budget:</b>	12,466.00
	<b>Variance (Budget minus E\$AC):</b>	-1,933.95

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

#### Other Measures

<b>Project Name</b>	HRS Internet 2013 (HRS Internet 2013)			
<b>Project Mode</b>	Primary: Web      Total of Modes: 1			
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current
<b>Budget</b>	<b>Direct Budget:</b> 263,974.00	<b>Indirect Budget:</b> 137,019.00	<b>Total Budget:</b>	400,933.00
<b>Principal Investigator/Client</b>	David Weir (SRC) Mary Beth Ofstedal (SRC) Kenneth Langa (SRC)			
<b>Project Team</b>	<b>Project Lead:</b> Maryam N Buageila <b>Budget Analyst:</b> Richard Warren Krause <b>Production Manager:</b> <b>Senior Project Advisor:</b> Mary P Maher <b>Production Manager:</b> James Koopman <b>Production Manager:</b>			
<b>Description:</b>	<p>Survey Research Operations will host and manage the HRS 2013 Internet Project. The Health and Retirement Study Internet Project has previously been conducted in 2003, 2006, 2007, 2009 and 2011. The current study will include all those previously invited to participate in the HRS Internet projects as well as a random sample of the additional core HRS sample members who reported using the Internet during their HRS 2012 interview. HRS staff will develop the questionnaire and program it in Illume. The programmed instrument and sample information including unique IDs for the preload will be provided to SRO by the Principal Investigator and his staff. SRO will host and manage the Illume survey and produce reports outlining the progress of the project.</p> <p>This project will utilize a sample of approximately 7,761 participants including previous Internet sample and random selection of new respondents who self select by indicating that they use the internet. The sample will be released in two replicates; the first being a 200 case pilot test and the second incorporating the remaining sample. SRO will send invitations and up to three reminders via mail and will utilize a specific help desk to address respondent concerns by phone and email.</p>			

**Project Period** 03/2013 - 08/2013  
**Data Collection** 04/2013 - 07/2013

**Proposal No:** 13-PAF05070

**Milestone Dates**

<b>PreProduction Start:</b> 03/10/2013	<b>Pretest Start:</b>
<b>Pretest End:</b>	<b>Recruitment Start:</b>
<b>Staffing Completed:</b>	<b>GIT Start:</b>
<b>SS Train Start:</b>	<b>SS Train End:</b>
<b>DC Start:</b> 04/22/2013	<b>DC End:</b>

**Important Project Dates**

**Initial Invitation Pilot:**04/22/2013

**Other Project Team Members**

Maryam Buageila, Jaime Koopman, management; Rick Krause, budget analyst; Hueichun Peng, programmer; Cathy Myles, project assistant; Karen Donahue, respondent payments; Adam Pocock, Peg Cooley, Megan Hromco, Help Desk

**Report Period**  
**Monthly Update**

Apr, 2013 (HRS Internet 2013) **Project Phase** Implementing  
 In April the initial invitation mailing was sent to 200 sample pilot run. Production started a within two days of the mailing. By the end of the month there were 24 surveys completed and 5 respondents had called the Help Desk for assistance. This is on track with previous waves. We are awaiting data review by PIs who will determine when the bulk of the production sample will be released.

**Special Issues**

The new panel members screened in HRS 2010/2011 have been slower to respond. The EBB cohort also is slower and less robust in response. We will be closely watching these cohorts for negative impact on response and budget since they may drive up our reminder mailing rates.

**Cost**  
**May 13, 2013**

<b>Total Cost to Date (Direct + Indirect):</b>	307,431.00
<b>Estimated Cost at Completion</b>	320,621.00
<b>Total Budget:</b>	400,933.00
<b>Variance (Budget minus E\$AC):</b>	80,312.00

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>	26	43%	NA
<b>Goal at Completion:</b>	5808	75%	
<b>Current actual:</b>	24	42%	NA
<b>Estimate at Complete:</b>	5808	75%	
<b>Variance:</b>	2	1%	

**Other Measures**

**Project Name** HRS Screening Initiative (HRS Screening Initiative)

**Project Mode** Primary: Face to Face Secondary: Telephone Total of Modes: 2

**Project Type** Sponsored Projects **Project Status** Current

**Budget** **Direct Budget:** 512,453.00 **Indirect Budget:** 0.00 **Total Budget:** 0.00

**Principal Investigator/Client** David Weir (UM Survey Research Center)  
 Mary Beth Ofstedahl (UM Survey Research Center)

**Project Team**

<b>Project Lead:</b>	Frost Alexander Hubbard
<b>Budget Analyst:</b>	Richard Warren Krause
<b>Production Manager:</b>	Theresa Camelo
<b>Senior Project Advisor:</b>	Mary P Maher
<b>Production Manager:</b>	
<b>Production Manager:</b>	

**Description:**

The purpose of the HRS Screening Initiative is to come up with a concrete plan for making the sample design and operational screening methods more cost efficient than what was done for HRS 2010-11. A detailed analysis of the HRS 2010-11 screening results, an experiment to examine the household rostering method which provides the best balance between high coverage and response rates and lowest cost (i.e. interviewer attempts) and a feasibility test of using a smartphone or tablet to screen households have been and will be conducted during the first three years of the HRS 2012-2017 proposal in order to design the optimal 2016 screening methods.

In terms of presenting results regarding the HRS 2010-11 screening, from August through November 2013, we conducted in-depth analyses of the HRS 2010-2011 screening and sample design for David Weir to present to the HRS Data Monitoring Committee in September 2012 and for Richard Valliant to present to the Committee on National Statistics on November 19, 2012. Both of these presentations generated many ideas for making the HRS sampling and screening methods more efficient.

Since the both the Cycle 7 and 2011-2019 National Survey of Family Growth's (NSFG) screening cooperation rates have been consistently higher than what HRS achieved in 2010-11, as of April 2013 we are in the process of adapting the NSFG screening techniques for the planned August-November 2013 screening experiment to improve the efficiency of field screening. The use of external information will include the acquisition of commercial lists of households which contain demographic information that may be used in screening, investigation of the availability and the feasibility of the use of motor vehicle records, and contacts with the Health Maintenance Organization Research Network (HMORN) to determine whether membership lists can be used in some states to facilitate screening. Note that as of April 2013, we have determined that using the HMORN is not feasible for HRS 2016 screening because the HMORN will not give us a list of their members. Instead, the HMORN would send a letter to their members asking if they would like to opt-in to the study.

Address lists will be compiled utilizing information from external databases such as MSG, DMV, Aristotle and Valassis lists. PSUs and segments will be selected to reflect geographic and demographic variations. Experienced interviewers will be hired and trained for the screening validation project. Each interviewer will validate listings and complete screening interviews in two segments within one PSU (total: 5 PSUs, 10 segments). Each interviewer will complete 20 hours of training. The estimated hours of updating the address listing using a stratified sampling frame is 10 hours per segment. The estimated hours per completed screener is 1.5 resulting in approximately 520 completed screening interviews. The distribution of interviewer hours is as follows:

Training Hours	100
Update address listing	100
Debriefing	20
Screening (1.5 HPS)	780
Total Hours	1000

**Project Period**  
**Data Collection**  
**Milestone Dates**

09/2012 - 12/2014  
 08/2013 - 11/2013

**Proposal No:** SRO # 11-0010R01

**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**

Frost Hubbard, Heidi Guyer, Wen Chang, Nicole Kirgis, Piotr Dworak, Richard Valliant, Sunghee Lee, Theresa Camelo

**Report Period**  
**Monthly Update**

Apr, 2013 (HRS Screening  
 March updated by task:

**Project Phase** Planning

2013 Screening Experiment

SurveyTrak Specs  
 April

March

1. Began working with Marsha Skoman on specs to set up SurveyTrak and FPRs for this project. SurveyTrak will be a combination of what was used in HRS 2011 data collection and NSFG data collection. Like in HRS 2011, for two of the experimental arms, interviewers will be asking a preliminary age eligibility screening question in SurveyTrak. If the HU appears to be age eligible based upon this brief question, SurveyTrak will launch Blaise and the interviewer will get the HH roster of all 18 and older in the HU.

Blaise Specs  
 April

March

1. Preliminary discussions with Karl Dinkelmann about the screener questionnaire in Blaise. The goal is to make the screener as lean and easy to complete as possible.

Budget

April

March

1. Worked with Rolfe Carlson and Rick Krause to come up with an estimated budget for the screening experiment. Need to determine from the HRS Pls how greatly they prioritize exploring new technologies such as smartphones and tablets. The more money that is spent investigating smartphones and tablets, the less \$ there will be for the screening experiment.

Exploring different sources of age information data from commercial and government sources

Obtaining DMV lists

April

March

1. Found article an by a public health researcher () showing which of the 50 states are open to sharing DMV files as long as the requester meets one of the exceptions in the Driver's Privacy Protection Act (DPPA). One of the exceptions in the DPPA says that an organization working on behalf of the federal government can obtain the state's DMV list on request. We need to follow up with Cathy Liebowitz, HRS chief administrator, to determine whether HRS can obtain such a letter of agreement from the National Institutes of Aging (NIA). In the meantime, Piotr Dworak will begin contacting Florida, New York, Texas and California to explore obtaining their DMV lists.

Commercial Data Exploration with the Census Bureau

April

March

1. Working on preparing a file and data dictionary to provide to the Census Bureau based on HRS 2010/11 data. The Census Bureau has agreed to work with us to provide crosstabs showing which commercial vendor provided the most i  
information and the most accurate information.

Other commercial sources (Aristotle and Valassis)

Aristotle

April

March

1. Aristotle: this company creates it's own proprietary voter registration database at the person level and then appends on to the voter records data from Experian. Using NSFG funds, we are exploring whether the data provided by our current vendor, MSG, or Aristotle is more predictive in statistical models predicting age eligibility as well as the likelihood to respond to a screener or a main interview request.

Valassis

April

March

1. Valassis: like Marketing Systems Group (MSG), Valassis is a provider of Delivery Sequence File (DSF) addresses. Valassis uses the No-Stat file, which contains vacant addresses which have been removed from the Postal Services DSF file and updates their DSF file daily to meet their coupon mailing needs. Based on previous work by NORC, it appears as though Valassis may provided better coverage of US housing units than MSG. It is unclear whether Valassis provides as much and as accurate commercial data as MSG. We plan to meet with Valassis representatives at AAPOR in May.

HMO Research Network (HMORN)

March

The HMO Research Network is a consortium of 18 health care delivery organizations with both defined patient populations and formal, recognized research capabilities. Their mission is to improve individual and population health through research that connects the resources and capabilities of learning health care systems. They aim to foster multidisciplinary research collaboration. I spoke with Cheryl Wiese, who in a previous job worked closely with HMORN, and working with them did not seem feasible. Cheryl indicated that HMORN will not give us a list of HMO patients but will instead send a letter to the patients in their database asking if they would like to opt-in to the study. HMORN will NOT just give us a list of persons along with their ages. According to Cheryl, HMORN works best if you are studying a specific medical condition, not a general population based study like the HRS.

AARP  
April

March

We are curious to determine how AARP identifies person age 50+ to recruit to join their organization. Through AAPORnet, the email listserv of AAPOR, we have identified a contact at AARP - John Fries. We plan to meet with him at the 2013 AAPOR conference to discuss how they obtain their members.

LBB Tracking Experiment:  
April  
No new news

March

From 2013-2016, we will be carrying out an ongoing tracking experiment with the following three arms for LBBs that were identified during the HRS 2010/11 screening project:

1. Passively track the location of identified LBBs through Accurant, a commercial data source with which UM has a pre-existing work agreement.
2. Passively track and send the LBB a yearly newsletter at the best known address
3. Passively track, send a yearly newsletter and invite the LBB to participate in an ancillary HRS study.

The statistics we will measure are:

1. In 2016, we will measure the location rate of each of the three groups
2. Prior to 2016, we can measure
  - a. % of lines that received the newsletter that call into the 800 number for more information or to complain
  - b. % of lines where newsletter bounced back from an incorrect address.

The first LBB newsletters were sent out to groups two and three on xx/xx/xxxx and xx/xx/xxxx respectively. No one has called into the 800 line at all.

#### Special Issues

<b>Cost</b>	<b>Total Cost to Date (Direct + Indirect):</b>	96,279.71
<b>Jun 04, 2013</b>	<b>Estimated Cost at Completion</b>	694,226.60
	<b>Total Budget:</b>	0.00
	<b>Variance (Budget minus E\$AC):</b>	2,709.40

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

#### Other Measures

<b>Project Name</b>	HRS-VA Data linkage Project - HRS Veterans Administration Consent Collection Project (HRSVA)				
<b>Project Mode</b>	Primary: Mail	Secondary: Telephone	Total of Modes: 2		
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current	
<b>Budget</b>	<b>Direct Budget:</b>	93,139.00	<b>Indirect Budget:</b>	33,531.00	<b>Total Budget:</b> 126,670.00
<b>Principal Investigator/Client</b>	David Weir (SRC) Ken Langa (SRC) Mary Beth Ofstedal (SRC)				
<b>Project Team</b>	<b>Project Lead:</b>	Rebecca Gatward			
	<b>Budget Analyst:</b>	Richard Warren Krause			
	<b>Production Manager:</b>	Sara D Freeland			
	<b>Senior Project Advisor:</b>	Mary P Maher			
	<b>Production Manager:</b>				
	<b>Production Manager:</b>				

**Description:** The Health and Retirement Study and the Veterans Health Administration are collaborating to combine VHA health care information with HRS data. The purpose of the study is to gain a more complete understanding of the health care Veterans receive, and the impact of the care on Veterans' health. SRO's role in this study is to gain permission from HRS participants for their VA health care data to be released and linked to their HRS data. We will also be collecting information about military history and their use and experience of VA health care via a short mail survey. Approximately 4,000 HRS panel members, who are not known to be deceased and who have not requested to be removed from the HRS core sample, are eligible to receive Veterans Administration (VA) benefits. These respondents will be asked for consent to release their VA health care data to the HRS and to complete a brief mail survey. There will be no face-to-face contact with respondents during this study. All contact with the respondent will be via mail or telephone. During the production period, a maximum of three mailings will be completed.

**Project Period** 05/2013 - 11/2013

**Proposal No:** 13-0014

**Data Collection** 05/2013 - 08/2013

**Milestone Dates**

<b>PreProduction Start:</b> 02/01/2013	<b>Pretest Start:</b>
<b>Pretest End:</b>	<b>Recruitment Start:</b>
<b>Staffing Completed:</b>	<b>GIT Start:</b>
<b>SS Train Start:</b>	<b>SS Train End:</b>
<b>DC Start:</b>	<b>DC End:</b> 07/31/2013

**Other Project Team Members**

Rebecca Gatward Project Lead  
Patty Maher SPA  
Sara Freeland Production Manager  
Holly Ackerman Programmer Analyst (WebTrak/Weblog)  
Joel Devonshire Data Manager  
Rick Krause Financial Analyst  
Heather Rejto Survey specialist Associate – Project Assistant

**Report Period**

Apr, 2013 (HRSVA)

**Project Phase**

Initiation

**Monthly Update**

- Pre-production work is on schedule.  
- A Project Charter for this study has been approved.  
- Project codes have been set-up and projections are in the Cost Reporting System.  
- The procurement process to contract the printing, mailing and scanning work to an external vendor has been completed with the contract being awarded to Apperson.  
- Respondent materials have been drafted and reviewed by PIs and are ready to be submitted to the IRB. The data authorisation form is currently being reviewed by the IRB, we will progress with the main project submission once this form has been approved and hope this will be by Friday 26th April.  
- The specification for a new Weblog component to manage the cases which require a reminder call, have been completed and passed to the programmer (Holly).  
- HRS\_SRC have delivered the sample and we are currently reviewing it to check for any erroneous cases – based on the respondent's stated preference not to receive survey updates or mail surveys or because they have been flagged to be reviewed for removal from the HRS sample  
- Apperson have started to work on formatting the mail survey.  
- We are due to send IRB approved respondent materials to Apperson by 10th May to allow them time to prepare the initial mailing (due to be mailed on 20th May).

**Special Issues**

**Cost**

**Apr 30, 2013**

<b>Total Cost to Date (Direct + Indirect):</b>	3,917.63
<b>Estimated Cost at Completion</b>	122,212.89
<b>Total Budget:</b>	126,670.00
<b>Variance (Budget minus E\$AC):</b>	4,457.11

Measures	Units Complete	RR	HPI
<b>Current Goal:</b>		65%	NA
<b>Goal at Completion:</b>			
<b>Current actual:</b>		NA	NA
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

## Other Measures

<b>Project Name</b>	Impact of the Michigan Merit Curriculum & Michigan Promise Scholarship on Student Outcomes Project (Transcript Study)		
<b>Project Mode</b>	Primary: Data Processing      Secondary: Not Available		
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current
<b>Budget</b>	<b>Direct Budget:</b> 72,443.00	<b>Indirect Budget:</b> 39,481.00	<b>Total Budget:</b> 111,924.00
<b>Principal Investigator/Client</b>	Barbara Schneider (Michigan State University) Brian Jacobs (University of Michigan) Kenneth Frank (Michigan State University)		
<b>Project Team</b>	<b>Project Lead:</b> Donnalee Ann <b>Budget Analyst:</b> Christine Evanchek <b>Production Manager:</b> <b>Senior Project Advisor:</b> Heidi Marie Guyer <b>Production Manager:</b> <b>Production Manager:</b> Donnalee Ann Grey-Farquharson		
<b>Description:</b>	<p>SRO will implement technical system and protocol development, and data collection activities for a five-school pilot study. The objectives of the data collection pilot include 1) design instruments, protocols and technical systems for the collection of student transcripts and other course-related materials; 2) estimate the uncertainties and contingencies that would likely ensue for the eventual full scale study (150 schools); and 3) define/propose the work scope and costs for the full scale data collection effort.</p> <p>Survey Research Operations involvement will cover a period of approximately 7 months, starting in June and continuing through December 2012.</p> <p>Between June , 2012 and December 31, 2012, a small SRO team will develop and implement the pilot study in five Michigan schools designed to obtain the following:</p> <ul style="list-style-type: none"> <li>• Transcripts on high school seniors from the initial time period (2002-2003) to the present.</li> <li>• End of course assessments (math &amp; science) from the initial time period to the present.</li> <li>• Syllabi of math &amp; science courses, textbooks, and other materials from the initial time period to the present.</li> <li>• Teacher rosters of class assignments from the initial time period to the present.</li> <li>• School surveys.</li> </ul> <p>Post Collection Processing:</p> <ul style="list-style-type: none"> <li>• All collected materials will be imported into the sample management system, requiring scanning of paper forms. No additional coding or data entry is included in the SRO budget.</li> <li>• All data file management and analysis will be performed by the EWB research staff.</li> </ul> <p>Weighting &amp; Estimating:</p> <ul style="list-style-type: none"> <li>• There are no sample weights or estimates expected for this pilot project.</li> </ul> <p>Deliverables:</p> <ul style="list-style-type: none"> <li>• Data files and documentation of instruments, protocols, and technical systems.</li> <li>• Proposal for the work scope/budget associated with data collection and coding activities for the full study sample.</li> </ul>		
<b>Project Period</b>	06/2012 - 12/2012		
<b>Data Collection</b>	08/2012 - 12/2012		
	<b>Proposal No:</b>		



**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**

Lesli Scott, Heidi Guyer, Karin Schneider, Donnalee Grey-Farquharson, Katie Huang, Hueichun Peng, Rebecca Loomis

**Report Period**

Apr, 2013 (Transcript Study)

**Project Phase**

Implementing

**Monthly Update**

Total budget for 2013 is \$222k - \$112k was the pilot budget total. We do not expect to overrun the 2013 budget. All the school payment checks have been drawn, those costs hit in Feb. We only send out the check once we rec'd data from the school.

\$15,000.00 credit expected from voided checks. We are now consolidating the efforts and continue to work to get data from schools that have agreed to participate but have not delivered the data. The PIs have said they will reach out to all the contacts in an effort to get more schools on board.

**Special Issues****Cost**

Apr 30, 2013

**Total Cost to Date (Direct + Indirect):** 272,071.57**Estimated Cost at Completion** 286,548.78**Total Budget:** 111,924.00**Variance (Budget minus E\$AC):** -174,624.78**Measures**

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

**Other Measures****Project Name**

Intensive Measurement of Drug Use during Transition to Adulthood (IMDU)

**Project Mode**

Primary: Web      Secondary: Mail

**Project Type**

Sponsored Projects

**Project Status**

Current

**Budget**

**Direct Budget:** 102,830.00      **Indirect Budget:** 57,072.00      **Total Budget:** 159,902.00

**Principal  
Investigator/Client**

Megan Patrick (ISR)

**Project Team**

**Project Lead:** Esther H Ullman  
**Budget Analyst:** William Lokers  
**Production Manager:** Barbara Aghababian-Homburg  
**Senior Project Advisor:** Sue Ellen Hansen  
**Production Manager:**  
**Production Manager:**

**Description:** During May and June 2012 approximately 600 high-school seniors will be recruited to complete a paper baseline questionnaire in three high schools in the southern part of Michigan. In September 2012 a letter and email invitation will be sent to 300 of the recruited respondents inviting them to complete a 30 minute web based questionnaire (Wave 1). The respondents will receive three email reminders over 10-14 days and a reminder phone call to complete the survey. They will then be sent, on a rolling basis, an email invitation to complete 14 daily diary surveys with daily email reminders. They will also receive texts and phone call reminders at designated intervals. They will be sent incentive checks based on amount of participation in each phase (i.e. number of daily diary's completed). There will be a second wave of the Web survey January 2013 following the same protocol as Wave 1. A third Wave will be conducted in May 2013 following the same protocol as earlier waves. In addition during the May 2013 administration a control group (N=300) will also receive the mail and email invitations to complete a web questionnaire. The control group will receive the three email reminders over 10-14 days and then phone or text messages but no daily diary questionnaires. In each of these waves the option of mailing a paper questionnaire will be included for those who do not have internet access. There will also be the need to obtain assent based on age at each administration

**Project Period** 02/2012 - 07/2013

**Proposal No:** 10-0050R02

**Data Collection** 05/2012 - 06/2013

**Milestone Dates**

**PreProduction Start:**

**Pretest Start:**

**Pretest End:**

**Recruitment Start:**

**Staffing Completed:**

**GIT Start:**

**SS Train Start:**

**SS Train End:**

**DC Start:**

**DC End:**

**Other Project Team Members** Minako Edgars, Rebecca Loomis

**Report Period** Apr, 2013 (IMDU)

**Project Phase** Implementing

**Monthly Update** During April preparations for May launch of Wave 3 were underway. Testing and production testing occurred. Work on the preload was underway as well.

**Special Issues**

**Cost**

<b>Total Cost to Date (Direct + Indirect):</b>	130,161.76
<b>Estimated Cost at Completion</b>	159,468.27
<b>Total Budget:</b>	159,902.00
<b>Variance (Budget minus E\$AC):</b>	433.73

**Measures**

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

**Other Measures**

**Project Name** Interactive Multi-Media Assmt of Tchrs' Knowledge (IMAK-R)

**Project Mode** Primary: Mixed

**Project Type** Sponsored Projects

**Project Status** Current

**Budget**

<b>Direct Budget:</b>	413,231.86	<b>Indirect Budget:</b>	214,880.00	<b>Total Budget:</b>	628,111.86
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**Principal Investigator/Client** Dr. Joanne Carlisle (U of M School of Education)

**Project Team**

<b>Project Lead:</b>	Meredith A House
<b>Budget Analyst:</b>	Stephanie A Ford
<b>Production Manager:</b>	
<b>Senior Project Advisor:</b>	Lesli Jo Scott
<b>Production Manager:</b>	
<b>Production Manager:</b>	

**Description:** The purpose of this project is to develop and explore the validity and practicality of using a web-based system to assess teachers' knowledge as evidenced through their evaluation of the effectiveness of reading lessons. SRO will participate in phases of the project that involve study and system design discussions with the SOE team; video-taping in classrooms and processing video clips from the footage that will be used in the system; development, programming and testing of a multi-media technical system. The technical system will allow teachers to view and rate the reading lessons using digital video recordings of classroom instruction presented through a multi-media website.

**Project Period** 08/2008 - 07/2012

**Proposal No:** 08-0028

**Data Collection**

**Milestone Dates**

**PreProduction Start:**

**Pretest Start:**

**Pretest End:**

**Recruitment Start:**

**Staffing Completed:**

**GIT Start:**

**SS Train Start:**

**SS Train End:**

**DC Start:**

**DC End:**

**Important Project Dates**

**Classroom video-taping:**10/01/2009  
**Beta Study data collection:**06/28/2010  
**"Main Study" data collection:**10/22/2010

**Other Project Team Members**

Larry LaFerte, Hemant Kannan, Jeannie Baker, Najla August

**Report Period**  
**Monthly Update**

Apr, 2013 (IMAK-R)

**Project Phase**

Closing

ET account became available in April. Larry and Meredith moved hours to this account. Jeannie was able to start and finish the small amount of remaining work (copying files out of eRoom and documenting their size) We purchased an external hard drive, copied the CSRL content to it, and shipped to NCLE.

New budget for content transfer added \$7,560.00 (\$4,974 Direct, \$2,586 Indirect) to the overall budget (reflected in numbers above)

**Special Issues**

**Cost**  
**Apr 30, 2013**

**Total Cost to Date (Direct + Indirect):** 620,447.42  
**Estimated Cost at Completion** 628,091.00  
**Total Budget:** 628,111.86  
**Variance (Budget minus E\$AC):** 20.86

**Measures**

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

**Other Measures**

<b>Project Name</b>	Math Solutions (LMT MS)		
<b>Project Mode</b>	Primary: Class SAQ	Secondary: Observation	Total of Modes: 3
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b> Current
<b>Budget</b>	<b>Direct Budget:</b> 1,249,959.00	<b>Indirect Budget:</b> 681,228.00	<b>Total Budget:</b> 1,931,187.00
<b>Principal Investigator/Client</b>	Heather C. Hill (Harvard University) Robin Tepper Jacob (University of Michigan) Douglas Corey (Brigham Young University)		
<b>Project Team</b>	<b>Project Lead:</b>	Karin Schneider	
	<b>Budget Analyst:</b>	Mary D Hopper	
	<b>Production Manager:</b>	Barbara Aghababian-Homburg	

**Senior Project Advisor:** Lesli Jo Scott**Production Manager:****Production Manager:****Description:**

Evaluation of the Math Solutions program. Recruit teachers (80) in Norfolk, VA, to be randomized into case group (receive Math Solutions training August 9-13, 2010) or control group (do not receive MS training). Teachers fill out 3 SAQs in year 1 (90 min & 30 min), 2 SAQs (30 min) in years 2 and 3. Administer student assessments (60 min) in Fall and Spring from 2010 to 2013. Videotape and code cases teachers on 3 different occasions (2 consecutive days each) in each of Spring and Fall of each year. Videotape control teachers 3 occasions (2 consecutive days each) in year 3 only. Teachers are interviewed after each videotaping (5-10 min) and treatment teachers will be interviewed 15-30 minutes each spring.

**Project Period**

05/2009 - 04/2013

**Proposal No:** 10-0018RO2**Data Collection**

12/2010 - 04/2013

**Milestone Dates**

<b>PreProduction Start:</b>	<b>Pretest Start:</b>
<b>Pretest End:</b>	<b>Recruitment Start:</b> 03/01/2010
<b>Staffing Completed:</b> 07/01/2010	<b>GIT Start:</b>
<b>SS Train Start:</b> 09/23/2011	<b>SS Train End:</b> 09/26/2011
<b>DC Start:</b> 11/14/2011	<b>DC End:</b> 06/30/2013

**Important Project Dates**

<b>teacher recruitment-YR 2:</b> 05/01/2011	<b>treatment prof dev:</b> 11/07/2011
<b>SR re-training (if needed):</b> 09/23/2011	
<b>fall student assessment:</b> 10/01/2011	<b>New teacher SAQs:</b> 11/07/2011
<b>contamination study SAQs:</b> 06/01/2011	<b>SRIS programming Year 2:</b> 05/31/2011
<b>Videotaping treatment teachers:</b> 11/01/2011	<b>Spring Student Assessment:</b> 04/01/2012

**Other Project****Team Members****Report Period**

Apr, 2013 (LMT MS)

**Project Phase**

Initiation

**Monthly Update**

no update available.

**Special Issues****Cost****May 31, 2013**

<b>Total Cost to Date (Direct + Indirect):</b>	0.00
<b>Estimated Cost at Completion</b>	0.00
<b>Total Budget:</b>	1,931,187.00
<b>Variance (Budget minus E\$AC):</b>	0.00

**Measures**

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

**Other Measures****Project Name**

MDRC - Reading Partners Program Evaluation Project (MDRC)

**Project Mode**

Primary: Class SAQ    Secondary: Face to Face    Total of Modes: 2

**Project Type**

Sponsored Projects

**Project Status**    Current**Budget**
**Direct Budget:** 612,409.00    **Indirect Budget:** 122,481.00    **Total Budget:** 734,890.00
**Principal****Investigator/Client**

Robin Jacob (EWB)

**Project Team**

**Project Lead:** Sarah Crane  
**Budget Analyst:** Christine Evanchek  
**Production Manager:** Sarah Crane  
**Senior Project Advisor:** Nicole G Kirgis

**Production Manager:****Production Manager:**

**Description:** Reading program assessment project in three different areas of the country. School-based group SAQ administration as well as individual assessments to evaluate student progress.

**Project Period** 08/2012 - 09/2013

**Proposal No:**

**Data Collection** 10/2012 - 08/2013

**Milestone Dates**

**PreProduction Start:**07/11/2012

**Pretest Start:**

**Pretest End:**

**Recruitment Start:**07/27/2012

**Staffing Completed:**08/22/2012

**GIT Start:**

**SS Train Start:**09/25/2012

**SS Train End:**09/27/2012

**DC Start:**10/01/2012

**DC End:**06/15/2012

**Other Project Team Members**  
Becky Loomis  
Jessica Huff  
Rachel Rifkin

**Report Period** Apr, 2013 (MDRC)

**Project Phase** Implementing

**Monthly Update** Project activities in April included the delivery, sorting, packing and shipping of hard copy assessments to the field. Field staff also secured travel arrangements and finalized admin schedules with schools and regional Reading Partners staff.

Updates were implemented and tested in the sample management system (SRIS), as well as in our data entry portal (Illume).

**Special Issues** Projected lwer hours for the spring data collection were based on our fall actual hours.

Our inherent efficiencies from laying the groundwork in the fall, and a somewhat leaner spring staff might cause the project to come in a bit under our current projections, but a review of spring actual hours is indicating that we remain under budget.

We will continue to fine-tune projections, with the goal of cutting back on the variance.

**Cost**  
**Apr 30, 2013**

<b>Total Cost to Date (Direct + Indirect):</b>	444,158.67
<b>Estimated Cost at Completion</b>	679,869.13
<b>Total Budget:</b>	734,890.00
<b>Variance (Budget minus E\$AC):</b>	-55,020.86

Measures	Units Complete	RR	HPI
<b>Current Goal:</b>	19 Schools Overall	90% Overall	N/A
<b>Goal at Completion:</b>			
<b>Current actual:</b>	19 Schools Fall	98% Fall	N/A
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

**Other Measures** Teacher survey Response Rate = 80%

**Project Name** Michigan Council on Educator Effectiveness (MCEE)

**Project Mode** Primary: Mixed Secondary: Observation Total of Modes: 3

**Project Type** Sponsored Projects **Project Status** Current

**Budget** **Direct Budget:** 0.00 **InDirect Budget:** 0.00 **Total Budget:** 4,900,000.00

**Principal Investigator/Client** Brian Rowan (U of M: Education and Well Being and SOE)

**Project Team**

<b>Project Lead:</b>	Stephanie A Chardoul
<b>Budget Analyst:</b>	Christine Evanchek
<b>Production Manager:</b>	Barbara Aghababian-Homburg
<b>Senior Project Advisor:</b>	Stephanie A Chardoul
<b>Production Manager:</b>	Meredith A House
<b>Production Manager:</b>	Evanthia Leissou

**Description:**

In 2011, Governor Snyder appointed a special advisory council, the Michigan Council for Educator Effectiveness (MCEE), to provide a recommendation to the State on standard teacher evaluation protocol that would be implemented State-wide. Last spring, the Council issued a preliminary report, stating that a pilot study was needed before they could make a recommendation. The chair of MCEE is Deborah Ball (UM School of Education Dean, and member of SRC-EWB faculty); she engaged Brian Rowan (and subsequently, SRC) in conducting the planned Pilot. SRO became involved in summer 2012, with the Pilot project officially starting in August.

The main components of the Pilot are teacher observation tools (4 proprietary tools were selected to be part of the Pilot) and standardized student assessments. With basically no preproduction or planning time, 14 school districts from across the State were selected and recruited into the Pilot sample. The districts were assigned one of the four observation protocols, and the principals and other administrators from every district attended 4 days of training (provided by the vendors but arranged by SRO). The training sessions occurred from mid-August through late September, and 8 SRO field staff ("school researchers") were also trained on the protocols with the principals. As part of the Pilot protocol, the principals are required to complete 3 observations (using their assigned tool) on every classroom teacher, and a subset of those observations will be "paired observations" with our SRO school researchers. We will use the paired observations to measure inter-rater reliability, as a way of assessing the validity of each tool.

In addition to the observations, each district is required to implement the Pilot student testing regime. The regime includes computer-adaptive testing (NWEA-MAP) for all K – 6 grade students, ACT-EXPLORE for 7th and 8th grade, ACT-PLAN for 9th and 10th grade, and ACT for 11th and 12th. All students will take at least two tests (fall and spring), and the results will be used to measure student growth during the year, and will be used to calculate Value Added Measurements (VAMs) for the teachers. SRO is responsible for contracting with the testing companies, providing training to the districts, coordinating all testing activities between the vendors and the districts, and collecting the results to prepare for analysis by EWB.

In order to implement the VAM modeling, links of students and teachers are required. As part of our SRIS sample management system, SRO is developing a "rostering" system that uses student and teacher data provided by the districts to format course lists that are accessed by teachers through a secure portal. The teachers confirm their students, and these rosters are then used as part of the analysis of teacher effectiveness.

In addition to the observation and testing components, SRO is also administering additional surveys of teachers and administrators in the districts, to collect information on their teacher evaluation process, and also their experience with the Pilot. SRO is also coordinating overall communication with the districts, including things such as an interactive web site, newsletters, etc.

The final deliverable is a report to MCEE that provides all analyses of the observations and student growth data, as well as descriptive information of the observation tools, the testing regime, and the general experience of the districts. This report will also include bids that we collect from the observation and VAM vendors, providing estimated costs for implementing their tools State-wide.

**Project Period**

08/2012 - 06/2013

**Proposal No:** 13-0007**Data Collection**

08/2012 - 05/2013

**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**

Stephanie Chardoul, Meredith House, Eva Leissou, Donnalee Grey-Farquharson, Cathy Myles.  
Veronica Connors Burge is a second Production Manager.  
Programmers are Hueichun Peng and Ahmad Chehade.  
Lesli Scott of EWB is a "consultant".

**Report Period**

Apr, 2013 (MCEE)

**Project Phase**

Implementing

**Monthly Update**

- ISR programmers finalized the rostering system. It has full functionality for loading in class lists by teacher, updating student status, approving each class, and sending the completed list to the administrator for final approval. Districts selected one elementary, one middle, and one high school to participate in the "rostering pilot". At each selected school, districts also nominated 2 teachers to participate in the pilot. Each selected teacher received an email invitation with instructions for accessing the rostering portal, creating a unique password, and completing the rostering task. For the rostering pilot, we used either semester 1 or trimester 2 class data (depending on the district's schedule). In two of the districts, Pilot staff from ISR traveled to the schools and observed teachers and principals completing the task. All teachers and principals who participated in the rostering pilot were also sent a brief web survey, so they could share feedback on their experience with the task. The rostering system was demonstrated to the Council and members of CEPI during an April Council meeting.
- The ISR school researchers continued with the paired observations, conducting scheduled sessions in conjunction with principals in all districts. March and April covered "Round 3" of the observations, so almost all observations were completed on all selected teachers (a few paired sessions are scheduled for early May).

- ISR data processing staff worked with each of the four observation vendors (and, in some cases, the additional vendors who supply the observation technical systems) to finalize the format of the observation data sets and secure access to all observation rating data (for both the paired observations done with the ISR school researchers and the observations completed by just the principals). We started preliminary review and cleaning of the observation data, and instructed the administrators in all districts to have their ratings entered for all observation sessions by May 10.
- ISR school researchers continued with calibration activities across the four observation protocols, focusing on a different protocol each week. Every Monday, the school researchers were assigned a new video to watch and apply ratings. Their ratings were compared to "master score" ratings provided by the vendors, and the results were discussed via conference call (usually with a trainer from the vendor's staff participating) the following Monday.
- ISR continued to work with the student assessment vendors (NWEA and ACT) to finalize plans for the spring testing. 11th graders completed the MME in March (ISR will receive those data directly from MDE), and schedules were set in each district for the NWEA and ACT/PLAN/EXPLORE testing in May. Some "negotiation" continued with districts who were not willing or able to follow the exact specifications of the MCEE Pilot testing regime.
- We continued to work with the selected VAM vendors on preliminary tasks related to the VAM modeling work – completing procurement steps within the University of Michigan and establishing the secure file transfer sites that will be used to share data files with the vendors.
- We finalized the data request and MOU language with the State of Michigan (MDE and CEPI) for both the VAM and general Pilot tasks. This required multiple exchanges between MDE and the University of Michigan. We are expecting final signatures to be obtained early May so we can receive the data required to complete our analysis work.
- We finalized the data agreement and MOU between NWEA (student testing vendor) and the University of Michigan. We also are required by NWEA to obtain signed data sharing agreements from each participating district – that document was finalized and we will obtain the signatures in May.
- We received the fall student testing data from ACT (ACT practice, ACT project, and PLAN) and began the process of formatting the files for analysis. The ACT data also requires a significant amount of "student matching", since the data does not have UIC attached. ISR's data processing staff is using UIC ? local student ID maps that we obtained from most districts, and also is manually matching on student name and birth date.
- The Pilot team continued planning for analyses across all components of the Pilot, creating file structures so that we're ready once we receive the data from MDE.
- The ISR team completed the 10 focus groups on administrator evaluations. Pilot staff traveled to each location across the state and conducted the 2-hour sessions with 7-15 participants per group. Pilot districts were also invited to participate in these sessions. A final focus group report was delivered to the MCEE subcommittee in April, and an ISR survey director joined the subcommittee for a special meeting to discuss the results and determine next steps/recommendations.
- The Pilot team continued to contact districts and conduct qualitative interviews (via phone) collecting information on their current implementation of teacher evaluations – including how they incorporate data from observations and student growth measures.
- The Pilot team finished planning for another round of focus groups, intended to collect information from each Pilot district on the costs and resources associated with teacher evaluation under the current system and state requirements. Three focus groups – one for principals, one for core subject teachers, and one for non-core subject teachers -- were held in late April in Lansing.

**Special Issues**

<b>Cost</b>	<b>Total Cost to Date (Direct + Indirect):</b>	2,038,096.08
<b>Apr 30, 2013</b>	<b>Estimated Cost at Completion</b>	3,451,673.33
	<b>Total Budget:</b>	4,900,000.00
	<b>Variance (Budget minus E\$AC):</b>	1,448,326.67

**Measures**

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

**Other Measures**

<b>Project Name</b>	Monitoring the Future Base Year 2013 (MTF BY 2013)				
<b>Project Mode</b>	Primary: Class SAQ				
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current	
<b>Budget</b>	<b>Direct Budget:</b>	408,821.00	<b>Indirect Budget:</b>	226,896.00	<b>Total Budget:</b> 635,717.00
<b>Principal</b>	Lloyd Johnston (SRC)				
<b>Investigator/Client</b>	Jerry Bachman (SRC)				

Patrick O'Malley (SRC)

**Project Team**

**Project Lead:** Lloyd Fate Hemingway  
**Budget Analyst:** Christine Evanchek  
**Production Manager:** Margaret Lavanger  
**Senior Project Advisor:** Jody Dougherty  
**Production Manager:** Barbara Aghababian-Homburg  
**Production Manager:**

**Description:** For the Base Year component of Monitoring the Future, approximately 500,000 8th-, 10th, and 12th grade students complete self-administered questionnaires at a national cross-section of approximately 415 schools. There are several different forms of the questionnaire, which deals with a wide variety of respondent attitudes and behaviors, including such topics as alcohol, drug, and tobacco use; social and political attitudes; and leisure time activities. Project staff recruits the schools to participate, and field interviewers conduct the questionnaire administrations.

**Project Period** 10/2012 - 06/2013

**Proposal No:** 11-0050R01

**Data Collection** 01/2013 - 06/2013

**Milestone Dates**

**PreProduction Start:**11/01/2012

**Pretest Start:**

**Pretest End:**

**Recruitment Start:**10/01/2012

**Staffing Completed:**11/30/2012

**GIT Start:**

**SS Train Start:**01/11/2013

**SS Train End:**01/30/2013

**DC Start:**02/15/2013

**DC End:**05/30/2013

**Other Project Team Members**

Marsha Skoman  
 Jennie Williams  
 Holly Ackerman

**Report Period** Apr, 2013 (MTF BY 2013)

**Project Phase** Implementing

**Monthly Update**

167 in-school administrations were completed as data collection ramped up throughout the month. The unusually inclement weather throughout the country created challenges, as school closings sometimes coincided with the scheduled administration dates. Our field staff worked with their schools and with the MTF project staff to get these rescheduled in a timely fashion. In spite of these difficulties, we found ourselves ahead of our hours per administration target at the end of the month.

**Special Issues**

The budget year on this 5-year cycle of MTF ends April 30, before the end of data collection. Year 1 was a 9-month year, excluding May, which usually contains more project costs than other months. So the under-run for Year 1 is appropriate, especially since May of Year 2 has three pay dates. With that in mind, projections for May and June track with previous waves, so the project is on track.

**Cost**

**Apr 30, 2013**

**Total Cost to Date (Direct + Indirect):** 602,843.30

**Estimated Cost at Completion** 602,843.30

**Total Budget:** 635,717.00

**Variance (Budget minus E\$AC):** 32,873.70

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>			31 hrs/admin
<b>Goal at Completion:</b>			28 hrs/admin
<b>Current actual:</b>			29.2 hrs/admin
<b>Estimate at Complete:</b>			28 hrs/admin
<b>Variance:</b>			

**Other Measures**

**Project Name** Monitoring the Future Web Programming and Survey Pilot (MTF-WPSP)

**Project Mode** Primary: Web Secondary: Mail Total of Modes: 2

**Project Type** Sponsored Projects

**Project Status** Current

**Budget** **Direct Budget:** 45,405.00 **Indirect Budget:** 81,809.00 **Total Budget:** 127,214.00

**Principal Investigator/Client** Megan Patrick (UM-SRC)

**Project Team**

**Project Lead:** Donnalee Ann  
**Budget Analyst:** Christine Evanchek



**Production Manager:** Lloyd Fate Hemingway  
**Senior Project Advisor:** Gina-Qian Yang Cheung  
**Production Manager:**  
**Production Manager:**

**Description:**

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

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

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

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

**Project Period**  
**Data Collection**  
**Milestone Dates**

08/2012 - 04/2017  
 01/2014 - 08/2017

**Proposal No:** 12-0003R04

**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**

Gina-Qian Yang Cheung, Donnalee Grey-Farquharson, Hueichun Peng, Andrew Piskowski, Aaron Pearson, Max Malhotra, Lloyd Hemingway

**Report Period**  
**Monthly Update**

Apr, 2013 (MTF-WPSP)

**Project Phase** Implementing

The scope has expended to include fielding a pilot survey and the proposal team is working with the PI to finalize the budget.

The total budget dollars will be adjusted to reflect the increased scope. The meeting with the PI went well and the scope expanded a bit more. This will delay finalization of the budget. First drafts for both Form 6 and Form 2 were completed and delivered to Study Staff.

The Study staff realized they had given us some wrong specs for form 6 and as a result we have to extend scope and time/cost to fix the problem this created.

Work on the RLM component has begun.

**Special Issues**

**Cost**  
**Apr 30, 2013**

<b>Total Cost to Date (Direct + Indirect):</b>	23,713.63
<b>Estimated Cost at Completion</b>	227,998.03
<b>Total Budget:</b>	127,214.00
<b>Variance (Budget minus E\$AC):</b>	-227,998.03

**Measures**

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

**Other Measures**

**Project Name** MTF Non-response 2013 (MTF NR 2013)

**Project Mode** Primary: Tracking Total of Modes: 1

**Project Type** Sponsored Projects **Project Status** Current

**Budget** **Direct Budget:** 189,430.00 **Indirect Budget:** 105,133.00 **Total Budget:** 294,563.00

**Principal Investigator/Client** Lloyd Johnston (SRC)  
Gerald Bachman (SRC)  
Patrick O'Malley (SRC)

**Project Team** **Project Lead:** Lloyd Fate Hemingway  
**Budget Analyst:** Christine Evanchek  
**Production Manager:** Bonnie C Andree  
**Senior Project Advisor:** Jody Dougherty  
**Production Manager:**  
**Production Manager:**

**Description:** The main purpose of MTF Non-response is to remind members of the MTF follow-up panels to complete and return their self-administered questionnaires. The respondents in these panels originally completed self-administered questionnaires dealing with attitudes toward social issues and behaviors such as alcohol, drug, and tobacco use when they were in the 12th grade. As a sub-sample of the MTF in-school administrations, they receive follow-up self-administered questionnaires at regular intervals well into adulthood. Some tracking is also involved, along with updating contact information.

**Project Period** 09/2012 - 08/2013 **Proposal No:** 11-0051R01  
**Data Collection** 05/2013 - 08/2013

**Milestone Dates**

**PreProduction Start:**03/20/2013  
**Pretest End:**  
**Staffing Completed:**04/12/2013  
**SS Train Start:**05/10/2013  
**DC Start:**05/15/2013

**Pretest Start:**  
**Recruitment Start:**03/20/2013  
**GIT Start:**  
**SS Train End:**05/14/2013  
**DC End:**08/12/2013

**Other Project Team Members** Marsha Skoman  
Peter Sparks  
Dave Dybicki  
Jennie Williams  
Holly Ackerman

**Report Period** Apr, 2013 (MTF NR 2013) **Project Phase** Implementing  
**Monthly Update** Recruiting and programming were the focus for the month of April. We identified 18 on-staffers, either active or holding, to work on the project, leaving us with a target of 10 new hires. We made 10 offers at the end of the month, of which 9 were accepted, so we headed into training with sufficient staffing.

The necessary yearly updates were programmed in the Blaise SMS application and in the Respondent Location Module (RLM). Testing found a few minor problems, which were quickly corrected, putting everything on track for a smooth start to production in May.

**Special Issues**

**Cost** **Total Cost to Date (Direct + Indirect):** 51,774.34  
**Apr 30, 2013** **Estimated Cost at Completion** 280,095.28  
**Total Budget:** 294,563.00  
**Variance (Budget minus E\$AC):** 14,467.72

**Measures**

Units Complete

RR

HPI

**Current Goal:**  
**Goal at Completion:**  
**Current actual:**  
**Estimate at Complete:**  
**Variance:**

**Other Measures** 1.2 Finds/Hr, 1.5 Finalized/Hr

**Project Name** National Children's Study (MANCS)

**Project Mode** Primary: Face to Face Secondary: Telephone Total of Modes: 2

Project Type	Sponsored Projects		Project Status	Current	
Budget	Direct Budget:	2,463,586.10	Indirect Budget:	359,585.49	Total Budget: 2,823,171.59
Principal Investigator/Client	Nigel Paneth (MSU) Daniel Keating (UM) Michael Elliot (UM)				
Project Team	Project Lead:	Kirsten Haakan Alcser			
	Budget Analyst:	Mary D Hopper			
	Production Manager:	Sarah Crane			
	Senior Project Advisor:	Beth-Ellen Pennell			
	Production Manager:	Shonda R Kruger-Ndiaye			
	Production Manager:				
Description:	<p>This is a longitudinal study that will enroll and follow a nationally representative sample of approximately 100,000 children born in the US. The study will collect informatin on children from birth through 20 years of age. Data collection starts during pregnancy or in some cases prior to pregnancy. The study combines survey research with biological, environmental and developmental assessments to measure how risk factors interact with each other to influence children's health. Eligibility requirements include: Women residing in randomly selected segments, aged 18-44, not infertile and not cognitively impaired. The study targets (1) non-pregnant women who are 18-44 and actively trying to become pregnant; (2) women age 18-44 who are in the first trimester of pregnancy; (3) several groups defined in terms of whether the women (age 18-44) are in a sexual relationship, using birth control, or are beyond the first trimester at initial screening.</p> <p>The Michigan study is currently funded to be carried out in Wayne County. It is a highly interdisiplinary study involving a large group of investigators across many fields, primarily in medicine or epidemiology, as well as many local institutions.</p> <p>NOTE (January 30, 2013: SRC contract expired end of September 2012. We received a 6 month extension (JPFOC) to close down the study including final data submissions and data destruction (in compliceance with FISMA.</p> <p>The budget for the extension has just been established and entered into CRS (January 2013). I am going to continue reporting on the extension under this entry. Thus, the budget numbers will not match the totals indicated here. I will make a note about that with each monthly update. The extention budget for SRO is \$165,239 (\$106,263 direct).</p> <p>The current funding in Wayne County is for 5 years. The UM/SRO budget includes costs for the two UM principal investigators, M. Elliott and D. Keating.</p> <p>A random selection of 15 segments will be done. SRO interviewers will update electronic listing information and screen all households in a selected segment. SRO will conduct baseline in-person interviews and repeated follow-up interviews (phone and in-person) with eligible mothers and fathers of children. SRO will screen approximately 12,000 households to complete about 1,750 effective screens and will enroll about 250 "births" during each of the 5 years for a total of 1000 "births".</p> <p>PILOT:</p> <p>(April 2010) MANCS Wayne County Pilot: The full MANCS workscope (and budget) is reduced. Various scopes of work will now be proposed and funded, the total budget not to be exceeded).</p> <p>As of October 2010, the CRS has been established for the NCS Provider-Based study only. This pilot is to be conducted in Wayne County and will recruit eligible women through their providers. Eligibility is still limited to age eligible women living within the boundaries of the originally sampled and listed 15 segments. The study goal is to recruit 100 women during a six month period, starting in January 2011. The NCS Project Office is expected to review progress from across different Study Centers each using one of 3 recruitment methods and then make a decision about how to proceed for the main data collection.</p> <p>For this reason (and per request from SRO financial group), we are changing the cost monitoring to monitor only for the Pilot.</p> <p>The original main MANCS was SRO #07-0055F; We have now input the number pertaining to the Pilot.</p>				
Project Period	10/2007 - 09/2012		Proposal No:	SRO #05-0055S01	
Data Collection	01/2010 - 08/2012				

**Other Project Team Members** Hemant Kanan; Jenny Bandyk; Brad Goodwin; Julie Webb; Donnalee Grey-Farquharson; Shaowei Sun; Rebecca Loomis

**Report Period** Apr, 2013 (MANCS) **Project Phase** Closing

**Monthly Update** This project closed down by end of March, hence no work was conducted in April. We waited for the April cost report to make sure no additional charges would show up. We have now files the official Financial Status Report (FSR) with the University.

Final financial status for this 6-month extension work:  
 SRO total budget of \$165,239; total spent: \$163,315 -> \$1,923.68  
 SMP (Mike Elliott) total budget of \$7,783; total spent \$8,486.96 -> (\$703.96)  
 Psych (Dan Keating) total budget of \$14,188; total spent \$14,422.30 -> (\$234.30)

Overall, for UM budget, a total of \$614.74 was deobligated.

#### Special Issues

**Cost**

**Apr 30, 2013**

<b>Total Cost to Date (Direct + Indirect):</b>	0.00
<b>Estimated Cost at Completion</b>	0.00
<b>Total Budget:</b>	2,823,171.59
<b>Variance (Budget minus E\$AC):</b>	0.00

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

#### 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:** 29,643,043.00 **Indirect Budget:** 10,415,123.00 **Total Budget:** 40,058,166.00

**Principal Investigator/Client** William Mosher (NCHS)  
Mick Couper (ISR)

**Project Team**

**Project Lead:** Nicole G Kirgis  
**Budget Analyst:** Nancy Oeffner  
**Production Manager:** Sharon K Parker  
**Senior Project Advisor:** Mary P Maher  
**Production Manager:** Jennifer M Kelley  
**Production Manager:** Sarrah Ahmed Buageila

**Description:** The NSFG is a national survey of women and men 15-44 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.

**Project Period** 09/2010 - 07/2020 **Proposal No:**

**Data Collection** 09/2011 - 09/2019

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

**Other Project Team Members** Chrissy Evanchek--Budget Analyst, Dan Tomlin--Project Support

**Report Period** Apr, 2013 (NSFG 2010-2020) **Project Phase** Initiation  
**Monthly Update** no update available.

**Special Issues**

**Cost**  
**May 31, 2013**

<b>Total Cost to Date (Direct + Indirect):</b>	0.00
<b>Estimated Cost at Completion</b>	0.00
<b>Total Budget:</b>	40,058,166.00
<b>Variance (Budget minus E\$AC):</b>	0.00

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

**Other Measures**

**Project Name** NGCS Supplement to Cognition and Aging in the USA (CogUSA Supp)  
**Project Mode** Primary: Web Secondary: Telephone Total of Modes: 2  
**Project Type** Sponsored Projects **Project Status** Current  
**Budget** **Direct Budget:** 98,863.00 **Indirect Budget:** 53,880.00 **Total Budget:** 152,743.00

**Principal Investigator/Client**

**Project Team**

<b>Project Lead:</b>	Zoanne Blackburn
<b>Budget Analyst:</b>	Dean E Stevens
<b>Production Manager:</b>	Esther H Ullman
<b>Senior Project Advisor:</b>	Kirsten Haakan Alcser
<b>Production Manager:</b>	Bonnie C Andree
<b>Production Manager:</b>	

**Description:** The purpose of this study is to continue the work done for CogUSA, Waves 4 & 5 – exploring the ways to best collect cognitive ability information from respondents across various modes. The sample for this effort will consist of a group of respondents who participated in the NGCS study with your collaborator Jack McArdle (“cogNGCS”).

Interviews will be conducted using both telephone and web modes. The telephone interviews will be completed from our centralized telephone facility (Survey Services Lab, or SSL) in Ann Arbor, using computer-assisted telephone interviewing (CATI) technology and our own electronic sample management system (SMS). The web survey component will be managed by SRO's Ann Arbor-based staff. Content of both telephone and web questionnaires will be taken from the questionnaires administered for CogUSA Waves 4 & 5.

**Project Period** 03/2014 - 07/2014 **Proposal No:**  
**Data Collection** 04/2014 - 07/2014

Milestone Dates	PreProduction Start:03/01/2013	Pretest Start:
	Pretest End:	Recruitment Start:
	Staffing Completed:	GIT Start:
	SS Train Start:	SS Train End:
	DC Start:04/22/2013	DC End:07/14/2013

**Other Project Team Members** ZoAnne Blackburn, Kirsten Alcser, Esther Ullman, Hueichun Peng, Youhong Liu, Dave Dybicki, Aaron Pearson, Bonnie Andree, Joel Devonshire, Emily Blasczyk, Jeannie Baker, Dean Stevens

**Report Period** Apr, 2013 (CogUSA Supp) **Project Phase** Initiation  
**Monthly Update** In April the team prepared the preload and instruments and conducted a production test in preparation for launch date of 4/22/13. The project started on time. Mailed invitations to 493 respondents (only 225 invitations were budgeted,

each of these included a prepaid checks). As of 4/27/13 16 cases were completed.

**Special Issues**

Projected over run is due to the incentives sent to the increased sample size. Project staff is aware of this and has approved it.

**Cost**

Apr 30, 2013

<b>Total Cost to Date (Direct + Indirect):</b>	91,375.88
<b>Estimated Cost at Completion</b>	171,721.60
<b>Total Budget:</b>	152,743.00
<b>Variance (Budget minus E\$AC):</b>	-18,978.60

**Measures**

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

**Other Measures**

<b>Project Name</b>	Panel Study of Income Dynamics 2013 (Family Economics Study) (PSID 2013)			
<b>Project Mode</b>	Primary: Telephone	Secondary: Face to Face	Total of Modes: 2	
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current	
<b>Budget</b>	<b>Direct Budget:</b> 3,238,350.00	<b>Indirect Budget:</b> 1,797,280.00	<b>Total Budget:</b>	5,035,630.00
<b>Principal Investigator/Client</b>	Charles Brown (Director) (ISR-SRC) Vicki Freedman & Narayan Sastry (Associate Dirs) (ISR-SRC) Katherine McGonagle (Assistant Dir) (ISR-SRC)			
<b>Project Team</b>	<b>Project Lead:</b> Shonda R Kruger-Ndiaye <b>Budget Analyst:</b> William Lokers <b>Production Manager:</b> Sara D Freeland <b>Senior Project Advisor:</b> Stephanie A Chardoul <b>Production Manager:</b> _UnAssigned <b>Production Manager:</b> Jennifer C Arrieta			

**Description:** PSID (known to Respondents as the Family Economics Study or FES) is a longitudinal survey of several thousand individuals and their families, carried out since 1968 and conducted every two years. The sample is comprised of respondents from the 4,800 original families as well as new (immigrant) sample added in 1997 and 1999. The total 2013 sample size will be approx. 10,500, with approx. 9,650 completed interviews expected. Most of the information collected is about family composition and changes (marriages, divorces, births, deaths, people moving in and out), income sources and amounts, employment and pensions and wealth. There are also questions about housing, education, vehicles, health, and money spent on food, healthcare, and school. The main focus is on how these family composition and financial factors interact with each other and how they change over time.

The 2013 wave features substantial questionnaire changes, including both content additions and more extensive use of preload. The increased preload is intended to reduce interview length and respondent/interviewer burden by permitting the interview to be streamlined based upon information already known. Those efficiencies are hoped to off-set the increase in length due to content additions.

Additionally, the DUST and TA ancillary studies will follow PSID Core data collection, interviewing eligible PSID sample members via telephone. In an additional ancillary effort, PSID Heads and spouses may be contacted via mail and asked to consent to Social Security Administration record linkage.

The project is also in the midst of an SRO leadership transition, with Shonda Kruger Ndiaye transitioning to the role of SRO Project Lead after data collection is launched.

**Project Period**  
**Data Collection**

04/2012 - 03/2014  
03/2013 - 12/2013

**Proposal No:** SO # 10-0056

**Milestone Dates**

<b>PreProduction Start:</b> 06/14/2012	<b>Pretest Start:</b> 10/31/2012
<b>Pretest End:</b> 11/13/2012	<b>Recruitment Start:</b> 09/28/2012
<b>Staffing Completed:</b> 01/01/2013	<b>GIT Start:</b>
<b>SS Train Start:</b> 02/23/2013	<b>SS Train End:</b> 03/08/2013
<b>DC Start:</b> 03/11/2013	<b>DC End:</b> 12/06/2013

**Other Project Team Members**

2011 Study Director/Advisor--Eva Leissou  
 Tech Lead--Jeff Smith  
 Blaise Programming--Youhong Liu  
 STRak Programming--Brant Zhang  
 Data Ops--Brad Goodwin, Minako Edgar, and Emily Blasczyk  
 WTrak/WLog Programming--Holly Ackerman  
 Help Desk Lead--Andrea Pierce  
 Production Manager Support--Peggy Lavanger

**Report Period** Apr, 2013 (PSID 2013) **Project Phase** Implementing

**Monthly Update**

April work included:

- On-going Production Monitoring
  - o Exploration of production differences between Field and SSL
  - o Finalization of weekly goal chart; evaluation of progress against goals
- Initial Interviewer QC evaluations
  - o Some on-going DRI issues in both the Field and (disproportionately) in the SSL
  - o Adjustments to flagging rates to address QC concerns
  - o Planned QC-based consolidation
- Programming, testing and release (4/3) of Production DM2, which included refinements to the English version of the questionnaire.
- Programming and testing of the Spanish version of the datamodel
- Split-off processing was on-going. We still await programmer availability to definitively address the limitation in the number of sample lines the program can successfully process.

**Special Issues**

As of a 5/9 Cost/Budget Check-In with PSID Project Staff, a rebudget is no longer necessary. The PIs ask that we monitor future cost reports against the March Cost Report cost-to-complete and use the memo from that meeting as a key budget document, moving forward. They also indicated that the overrun in the March report (\$53,487.60 Direct, \$83,1890.10 Total) was low in light of the project's overall budget and they did not wish to discuss any work scope changes at this point.

**Cost**  
**Apr 30, 2013**

**Total Cost to Date (Direct + Indirect):** 1,991,759.84  
**Estimated Cost at Completion** 5,102,845.36  
**Total Budget:** 5,035,630.00  
**Variance (Budget minus E\$AC):** -67,216.36

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>	3,799		4.90
<b>Goal at Completion:</b>	9,470	94% overall	5.8
<b>Current actual:</b>	4,337	45%	
<b>Estimate at Complete:</b>	9,470	94% overall	5.8
<b>Variance:</b>	0	0	0

**Other Measures**

Note: Completes, RR and HPI are through week 8 (5/4/2013). HPI is Cumulative Production HPI. Actual HPI is not currently included in this report as a problem with the pulling of ET hours into the report is being resolved. It will be added once this is fixed.

**Project Name** Responding to Surveys on Mobile Multimodal Devices (iPhone)

**Project Mode** Primary: Mixed Total of Modes: 3

**Project Type** Sponsored Projects **Project Status** Current

**Budget** **Direct Budget:** 143,675.00 **Indirect Budget:** 78,301.00 **Total Budget:** 221,976.00

**Principal Investigator/Client** Dr. Fred Conrad (University of Michigan)  
 Dr. Michael Schober (The New School for Social Research)

**Project Team**

**Project Lead:** Andrew L Hupp  
**Budget Analyst:** Mary D Hopper  
**Production Manager:** Lloyd Fate Hemingway  
**Senior Project Advisor:** Stephanie A Chardoul  
**Production Manager:**  
**Production Manager:**

**Description:** The primary objectives are to (1) begin the empirical assessment of collecting survey data with multimodal, mobile devices; (2) evaluate the impact of new modes such as automated voice and human text interviews on participation, completion, data quality and user satisfaction, especially in comparison to familiar modes like human voice interviews; and (3) explore how this might differ when it is possible for respondents to choose a response mode – one that is potentially different from the mode in which they are invited. Ultimately, these data will add to basic understanding of human dynamics: when and how people are willing to disclose information to interlocutors (human and computer) with different communicative attributes.

**Project Period** 01/2011 - 06/2012

**Proposal No:** 10-0003R01

**Data Collection** 03/2012 - 06/2012

**Milestone Dates**

**PreProduction Start:**

**Pretest Start:**

**Pretest End:**

**Recruitment Start:**

**Staffing Completed:**

**GIT Start:**

**SS Train Start:**

**SS Train End:**

**DC Start:**

**DC End:**

**Other Project  
Team Members**

Hemant Kannan - Management system programming consultant  
Yanna Yan - SMP MA Student  
Chris Antoun - SMP PhD Student  
Chan Zhang - SMP PhD Student  
Heather Schroeder - Stat Unit (Sampling and Reporting)

**Report Period**

Apr, 2013 (iPhone)

**Project Phase**

Closing

**Monthly Update**

The interface development at Parsons continues. The interviewing interface looks pretty good. There are a few small things that Parsons needs to address. Parsons is focusing more heavily on the automated side. A good portion of the work there is done. They are refining the grammars and the recognition to make the system operate better.

Parsons has provided some output from the system to the analysts so they can see the structure and look to see if there is anything else we would like to capture/add.

There have been some revisions to the questionnaire. I have spoken to the PI to make sure they are going to submit all of the little changes that have been made along the way to various pieces of text (questionnaires, recruiting text, etc.) Rhonda MH is looking into the iTunes incentives that we want to use. Parsons made the initial contact and UM has taken that over.

A training is planned for the SSL staff in March. Development of training materials will occur in February. With HRS starting in the lab in May we need to get started soon to get data collected.

A usability test was conducted in January. A pilot is planned for early March (hopefully rolling into production). We continue to push the developers.

The Michigan team also met to work on the recruiting items around Craigslist. SMP meets regularly to discuss the items in the questionnaire, the screener and the post-survey.

March '12

The interviewers were trained in March. A brief pilot of the system followed the training. 40 interviews (10 in each mode) were conducted to test to make sure everything was working correctly. The feeling thermometer questions were dropped after the pilot due to them being problematic in IVR. There were other recognition issues identified in IVR. Production began at the very end of March in three modes (human-voice, human-text, and automated-text). Refinement of the IVR will continue and will data collection will resume with that once things have been addressed.

Recruiting has been done using Facebook, Craigslist and GoogleAds. Facebook proved to not be very production so it was dropped. Recruiting continues via Craigslist and GoogleAds. There have been days where recruitment has not kept up with production and interviewing has finished early several days or has not occurred at all due to lack of sample. Various things are being tried to coordinate the availability of sample (including increasing the call limit on cases that are now out of the contact pool).

Apr. '12

The study has progressed well. There were initial problems with IVR which have been fixed. The human interviewing is almost complete. It is expected to finish in early May. Human text interviews will be the first group to finish. Recruiting has been a bit of a hinderance. We have continued to recruit due to not being able to recruit a large enough sample to keep the interviewers busy (between the size of the sample and the calling rules). For the second experiment we will need to recruit a larger group before getting started to keep the group more efficient. The overall HPU has been low but could be lower due to the previous explained inefficiency. There have been some sporadic payment problems but it seems to be due to the user and technical issues rather than the codes provided not being good. The first experiment is expected to be finished prior to AAPOR. The second experiment will start at some point after that (in June or July).



## May '12

The first experiment concluded data collection in early May. The goal was 600 interviews. We ended with 642 across all four modes. Human text interviews was the first group to finish with the IVR group the last to finish. The IVR group started later due to technical issues. They did finish quite rapidly due to it being an automated system.

We switched much of the recruiting to Mechanical Turk. Over the coming month the recruiting will be analyzed to determine the best way forward for the recruitment of participants for Experiment 2. The results of the first experiment have received a bit of press and a presentation at AAPOR and a panel at IFDTC were given about the project. Plans are underway to present at next years conferences with the results of Experiment 2.

A few modifications to the system will be done in May and June to prepare for Experiment 2 (mode switching). Once those have been made and tested the interviewers will receive a brief refresher and data collection will begin. It is estimated that will occur in late June.

## June '12

The one developer left at Parsons has made most of the changes to the system for the second experiment. The New School is in contact with one of the developers on the project who has graduated and been unresponsive about fixing the few items he programmed. Once that has happened we can move forward with further testing and a pilot.

Testing to date shows the most of the fixes and development for the second experiment seem to be in place. Once the last few items and the other programmer fixes items related to the interview UI we can do some final testing and begin the pilot with production (hopefully) to follow shortly thereafter. We will begin recruiting a little before production to build up the pool of respondents.

## July '12

Two trainings for interviewers were held. A refresher for those continuing on the project along with what changed and a separate training for those who were experienced in interviewing but new to the project. A test of the system was done with cases for a week which rolled into data collection. We started recruiting to build up a larger pool of cases so we can avoid the issue of running out of cases that we had during the first experiment.

## August '12

Data collection for experiment two began in August. So far things have gone smoothly. We will need to interview into September. We will continue recruiting to try and keep the available pool up to keep the staff busy. We are in a better position at the start than we were when experiment 1 began. More iTunes codes will need to be ordered at some point. There is some uncertainty about how many people will switch modes and to which modes they will switch. We will adjust staffing accordingly to go with the flow.

## September '12

Data collection for experiment two concluded in September. Things went smoothly. A debriefing was held with the PIs and the interviewing staff at the end of the month. The interviewing staff provided insight to how this worked and things the researchers needed to think about.

We had trouble purchasing more iTunes codes towards the end. The business office had purchased them directly from Apple with no problems previously. Apple changed the way that you could purchase codes (at least for educational institutions (which the contract with UM further complicated). The few remaining codes needed were procured by purchasing iTunes gifts cards at a local store and getting the code from that card and loading it into the system.

Towards the end we tried to balance the sample composition to get close to what we had for experiment one. That was achieved. Analysis will begin on the experiment two data.

## October '12

Due to the busy schedule of the PIs, Andrew is helping the research team with the analysis moving forward. Most work in SRO is done. Andrew is working on getting the accounts extended out so he can continue working on the project through the analysis phase. The team is working on deciding the presentations that will be given for AAPOR.

## November/December '12

We purchased two Mac laptops with the PI approval on the SRO accounts. Andrew has one and one of the grad students (Chris Antoun) has the other. The laptops are needed to do the interaction coding. The software for the interaction coding only runs on the Mac. The accounts have been extended through the end of the project period (Sept. '13). The project will likely apply for a no cost extension. The work has turned towards the analysis. Andrew will be assisting the research staff with this task moving forward.

## January '13

Andrew has created a coding application to code the open ended answers related to mode choice. Andrew and two graduate students will code the open-ended answers (and calculate inter-rater reliability). Andrew spoke with the PI and budgeted some travel on the SRO budget. This will cover the PIs, two graduate students and two SRO staff

members to go to presentations related to the project at the Cannell Interviewer Respondent Interaction Workshop, AAPOR and IFDTC. The remainder of the funds will be going back to the PI. Work continues on the analysis of the data collected for the Cannell Interviewer Respondent Interaction workshop, AAPOR, IFDTC and ESRA.

#### February '13

Andrew and two graduate students have been working through the coding scheme and have coded a few cases. We met after those few cases to calibrate how we were coding particular items and adjusted/added codes as necessary. Coding will continue and then a reliability calculated. The project will be covering conference expenses for Lloyd (IFDTC) and Andrew (Interviewer/Respondent Interaction Workshop/AAPOR/IFDTC).

#### March '13

Andrew and two graduate students coded the open ended data on why participants selected the mode they chose for experiment 2. Analysis work on the three AAPOR presentations and two IFDTC presentations continues. The project will be covering conference expenses for Lloyd (IFDTC) and Andrew (Interviewer/Respondent Interaction Workshop/AAPOR/IFDTC) and for others on the project team to travel to conferences (AAPOR/IFDTC/ESRA).

#### April '13

Analysis work on the three AAPOR presentations and two IFDTC presentations continues. The remaining SRO project funds will be covering conference expenses for Lloyd (IFDTC) and Andrew (Interviewer/Respondent Interaction Workshop/AAPOR/IFDTC) and for others on the project team to travel to conferences (AAPOR/IFDTC/ESRA).

#### Special Issues

Issues related to privacy have come up due to some recent publicity around the iPhone collecting GPS data and storing it in an unencrypted file. We will need to make sure that people are in a safe place and may need to tell them to delete the text conversations (if in that mode) before synching, otherwise the history will be kept on the users computer and could potentially be subpoenaed.

Working on how to recruit participants and pay them via iTunes.

Cost  
Apr 30, 2013

<b>Total Cost to Date (Direct + Indirect):</b>	172,400.78
<b>Estimated Cost at Completion</b>	221,406.71
<b>Total Budget:</b>	221,976.00
<b>Variance (Budget minus E\$AC):</b>	670.28

#### Measures

	Units Complete	RR	HPI
<b>Current Goal:</b>	300/600		
<b>Goal at Completion:</b>	300/600		
<b>Current actual:</b>	341/625		
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

#### Other Measures

<b>Project Name</b>	Surveys of Consumer Attitudes (SCA 2013)			
<b>Project Mode</b>	Primary: Telephone	Total of Modes: 1		
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current	
<b>Budget</b>	<b>Direct Budget:</b> 855,961.00	<b>Indirect Budget:</b> 0.00	<b>Total Budget:</b>	855,961.00
<b>Principal Investigator/Client</b>	Dr. Richard T. Curtin (SRC)			
<b>Project Team</b>	<b>Project Lead:</b>	Joseph Matthew		
	<b>Budget Analyst:</b>			
	<b>Production Manager:</b>	Bonnie C Andree		
	<b>Senior Project Advisor:</b>	Mary P Maher		
	<b>Production Manager:</b>			
	<b>Production Manager:</b>			

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

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

**Project Period** 01/2013 - 12/2013

**Proposal No:** 13-0036

**Data Collection** 01/2013 - 12/2013

**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**

Dave Dybicki  
Pamela Swanson  
Bonnie C Andree  
Ann Munster

**Report Period** Apr, 2013 (SCA 2013)

**Project Phase** Implementing

**Monthly Update** no update available.

**Special Issues**

**Cost**  
**May 31, 2013**

<b>Total Cost to Date (Direct + Indirect):</b>	0.00
<b>Estimated Cost at Completion</b>	0.00
<b>Total Budget:</b>	855,961.00
<b>Variance (Budget minus E\$AC):</b>	0.00

**Measures**

**Units Complete**

**RR**

**HPI**

**Current Goal:**

**Goal at Completion:**

**Current actual:**

**Estimate at Complete:**

**Variance:**

**Other Measures**

**Project Name** Sustainability Cultural Indicators Project (SCIP)

**Project Mode** Primary: Web Total of Modes: 1

**Project Type** Sponsored Projects

**Project Status** Current

**Budget**

<b>Direct Budget:</b>	426,980.00	<b>InDirect Budget:</b>	0.00	<b>Total Budget:</b>	426,980.00
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**Principal Investigator/Client**  
John Callewaert (Graham Environmental Sustainability Institute)  
Robert Marans (ISR)  
Michael Schriberg (LSA UG: Environment)

**Project Team**

<b>Project Lead:</b>	Cheryl Wiese
<b>Budget Analyst:</b>	Rhonda R McCammon
<b>Production Manager:</b>	
<b>Senior Project Advisor:</b>	Stephanie A Chardoul
<b>Production Manager:</b>	
<b>Production Manager:</b>	

**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. In the current IRB application, we are requesting approval only for the 2012 survey questionnaire. Amendments will be submitted each year in order to re-approve each wave of the survey.

The survey component of this project conducted in the Fall 2012 builds on the previously-approved Focus Group Initiative, which resulted in 15 focus groups being conducted in the Spring 2012.

**Project Period** 07/2012 - 06/2017

**Proposal No:** 11-0042R03

**Data Collection** 10/2012 - 12/2016

**Milestone Dates**

**PreProduction Start:**01/01/2012

**Pretest Start:**09/04/2012

**Pretest End:**09/12/2012

**Recruitment Start:**

**Staffing Completed:**

**GIT Start:**

**SS Train Start:**

**SS Train End:**

**DC Start:**10/23/2012

**DC End:**11/26/2012

**Other Project Team Members**

Dave Dybicki & Meredith House providing Illume programming support.  
Becky Loomis providing some administrative assistance.  
Heather Schroeder providing weighting and data prep-to-analysis.

**Report Period**

Apr, 2013 (SCIP)

**Project Phase**

Initiation

**Monthly Update**

No update info available.

**Special Issues**

**Cost**

**May 31, 2013**

**Total Cost to Date (Direct + Indirect):**

0.00

**Estimated Cost at Completion**

0.00

**Total Budget:**

426,980.00

**Variance (Budget minus E\$AC):**

0.00

**Measures**

**Units Complete**

**RR**

**HPI**

**Current Goal:**

**Goal at Completion:**

**Current actual:**

**Estimate at Complete:**

**Variance:**

**Other Measures**

**Project Name**

Transition to Adulthood (2013) (TA 2013)

**Project Mode**

Primary: Telephone Total of Modes: 1

**Project Type**

Sponsored Projects

**Project Status**

Upcoming

**Budget**

**Direct Budget:** 441,640.00

**Indirect Budget:** 245,109.00

**Total Budget:** 686,749.00

**Principal Investigator/Client**

Narayan Sastry (SRC)  
Kate McGonagle (SRC)

**Project Team**

**Project Lead:**

Piotr Dworak

**Budget Analyst:**

William Lokers

**Production Manager:**

\_UnAssigned

**Senior Project Advisor:**

Stephanie A Chardoul

**Production Manager:**

**Production Manager:**

**Description:** Transition to Adulthood is part of the PSID suite of projects. The purpose of this survey is to collect data from 18 – 27 years old, whose families participate in 2013 PSID. The goal of the project is to collect variety of information during these critical transition years when major investments are made in education and when carriers are planned and initiated.

This is the 5th wave of TA. SRO provided data collection services for four waves Transition to Adulthood (TA; in 2005, 2007, 2009, 2011) involving CAI and systems programming, managing national data collection. This wave (TA 2013) will be conducted using centralized SROs Survey Services Lab. The TA project provides SRO with the opportunity to continue its collaboration with the PSID research program and expand competencies (in particular in targeting younger Respondents (18 – 27)).

**Project Period** 06/2013 - 08/2014

**Proposal No:**

**Data Collection** 09/2013 - 04/2014

**Milestone Dates**

**PreProduction Start:**

**Pretest Start:**

**Pretest End:**

**Recruitment Start:**

**Staffing Completed:**

**GIT Start:**

**SS Train Start:**

**SS Train End:**

**DC Start:**

**DC End:**

**Other Project** TBD

**Team Members**

**Report Period** Apr, 2013 (TA 2013)

**Project Phase** Initiation

**Monthly Update** Work has not started.

**Special Issues**

**Cost**

<b>Total Cost to Date (Direct + Indirect):</b>	0.00
<b>Estimated Cost at Completion</b>	0.00
<b>Total Budget:</b>	686,749.00
<b>Variance (Budget minus E\$AC):</b>	0.00

**Measures**

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

**Other Measures**

**Project Name** UM College of Pharmacy Alumni Study (UMCOP Alum Study)

**Project Mode** Primary: Web

**Project Type** Sponsored Projects

**Project Status** Current

**Budget**

<b>Direct Budget:</b>	47,765.00	<b>Indirect Budget:</b>	0.00	<b>Total Budget:</b>	47,765.00
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**Principal Investigator/Client** Mr. Peter Niedbala (Director of Pharmacy Advancement U of M)

**Project Team**

**Project Lead:** Esther H Ullman

**Budget Analyst:**

**Production Manager:**

**Senior Project Advisor:** Zoanne Blackburn

**Production Manager:**

**Production Manager:**

**Description:** The purpose of this project is to contact approximately 4,000 U-M College of Pharmacy alumni, primarily via email, to invite them to participate in a short web survey. SRC's involvement with this project includes programming the short web-based questionnaire including biographical items as well as approximately 15 survey questions, inviting pre-identified respondents by email, mail, and telephone, and tracking non-respondents, as necessary.

**Project Period** 12/2012 - 06/2013  
**Data Collection** 02/2013 - 05/2013

**Proposal No:** 13-0005R01

**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**

**Report Period  
Monthly Update**

Apr, 2013 (UMCOP Alum Study)

**Project Phase**

Implementing

In April training for follow-up calling by SSL interviewers was held. Calling started in April to assist alumni in completing their update forms. By the end of April 1706 updates were completed, 343 partials were done and 46% of the sample had not started their update.

**Special Issues**

**Cost  
Apr 30, 2013**

**Total Cost to Date (Direct + Indirect):** 25,594.04

**Estimated Cost at Completion** 47,450.32

**Total Budget:** 47,765.00

**Variance (Budget minus E\$AC):** 314.68

**Measures**

**Units Complete**

**RR**

**HPI**

**Current Goal:**

**Goal at Completion:**

**Current actual:**

**Estimate at Complete:**

**Variance:**

**Other Measures**