Survey Research Operations

Monthly Project Report

Sponsored Projects

April 2014

Sponsored Projects

(PPDS-T3) Army STARRS Pre/Post-deployment Time 3
(COGUSA 6_7) Assessing and Improving Cognitive Measures in the HRS
(BAM) Becoming A Man
(CogEcon2013 Web/Mail Study) Cognitive Economics 2013
(MRRS III) Effects of Recession and Economic Stimulus in Southeast Michigan Wave III
(DUST II 2013) Health and Daily Life
(HRS 2014) Health and Retirement Study 2014
(CogVal) HRS Cognitive Diagnosis Validation Study
(HRS CAMS13) HRS Consumption and Activity Study
(HRS HCNS) HRS Health and Nutrition Mail Study
(HRS Screening Initiatives) HRS Screening Initiatives
(MCEE) Michigan Council on Educator Effectiveness
(MTF BY 2014) Monitoring the Future 2014 Base Year
(MTF-WPSP Year 2) 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)
(PSID-CE (aka FES-CE)) Panel Study of Income Dynamics Childhood Experiences Web/Mail Project
(SRS W3) Social Relations, Aging and Health: Competing Theories and Emerging Complexities, Wave 3
(SCA 2014) Surveys of Consumer Attitudes
(SCIP) Sustainability Cultural Indicators Project
(H&C) The Role of Housing in Healthy Child Development
(TA 2013) Transition to Adulthood (2013)
(CDS IV) Transitions from Preschool through High School: Family, Schools and Neighborhoods
(WHO-MDS) World Health Organization Model Disability Survey

Project Name	Army STARRS Pre/Post-deployment Time 3 (PPDS-T3)
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	*Direct Budget:* 0.00 *InDirect Budget:* 0.00 *Total Budget:* 0.00
Principal Investigator/Client	
Funding Agency	
IRB	*HUM#:* *Period Of Approval:*
Project Team	*Project Lead:* Nancy J Gebler
	Budget Analyst: William Lokers
	Production Manager: Ruth B Philippou
	Senior Project Advisor:
	Production Manager: Margaret Lee Hudson
	Production Manager: Andrew L Hupp

Description:

The Pre-Post Deployment Study (PPDS) is one survey interview component of Army STARRS. The aim of the PPDS is to study longitudinally the biological, genetic, and neurocognitive effects of deployment to a theater of combat operations and to examine the relationship between observed physical and neurological changes and the risk/resilience of suicidality and related mental health disorders.

The PPDS consists of interviewing Soldiers from Brigade Combat Teams (BCTs) that deployed as part of Operation Enduring Freedom (OEF) during CY2012.   Each BCT contained between 3,000-4,000 Soldiers.

The PPDS design features two separate data collections: (1) the Pre-Deployment Study (PRDS) and (2) the Post-Deployment Study (PTDS). The PRDS data collection occurred January—February 2012. The data collection consisted of a blood draw and a computer-assisted self-interview (CASI) administered in a group setting at each of the three sites.

The PTDS data collection includes three main data collection phases occurring at separate time intervals following a unit's return from Afghanistan:

(1)   a blood draw and short self-administered paper survey to be administered in a group setting immediately following the Soldiers' return;
(2)   a computer-assisted self-interview administered in a group session occurring approximately 60-90 days following the Soldiers' return; and
(3) a 9-month follow-up survey, administered in two modes: web and telephone

T3 cases are initially randomized into one of two modes of data collection: web or phone. A majority of the cases are assigned to web first. The remaining cases will be assigned to phone.

Project Period	07/2009 - 06/2014 **Proposal No:**
Data Collection Perio	07/2013 - 03/2014
Security Plan	
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	
Other Project Names	

Report Period	Apr, 2014 (PPDS-T3) **Project Phase** Initiation
Risk Level	*Not Rated*
Monthly Update	No update data for April available.
Special Issues	

Cost
May 31, 2014

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

Projections
May 31, 2014

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

Measures

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

Other Measures

Project Name	Assessing and Improving Cognitive Measures in the HRS (COGUSA 6_7)
Project Mode	Primary: Telephone Secondary: Web Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 391,530.00 **InDirect Budget:** 213,384.00 **Total Budget:** 604,914.00
Principal Investigator/Client	Robert Willis (University of Michigan) Jack McArdle (University of Southern California) Gwen Fisher (Colorado State University)
Funding Agency	Subcontract from University of Southern California. USC funder is National Institutes on Aging.
IRB	**HUM#:** HUM00001406 **Period Of Approval:** 4/1/2014-4/1/201!
Project Team	**Project Lead:** Zoanne Blackburn **Budget Analyst:** Dean E Stevens **Production Manager:** Esther H Ullman **Senior Project Advisor:** Kirsten Haakan Alcser **Production Manager:** Lisa J Carn **Production Manager:**
Description:	The purpose of this study is to continue the work done for Assessing and Improving Cognitive Measurements in the HRS last conducted in 2012/2013 (CogUSA 4/5 and CogUSA NGCS Supplement) – exploring the ways to best collect cognitive ability information from respondents across various modes. One of the research goals of this project is to consider whether unbiased cognitive measures of adults can be collected in a reliable and valid fashion via the Web.
Project Period	07/2011 - 04/2015 **Proposal No:** SO #: 10-0032R02
Data Collection Perio	02/2014 - 07/2014
Security Plan	Yes

Milestone Dates

PreProduction Start:	**Pretest Start:**
Pretest End:	**Recruitment Start:**
Staffing Completed:	**GIT Start:**
SS Train Start:02/13/2014	**SS Train End:**02/13/2014
DC Start:02/20/2014	**DC End:**07/31/2014

Other Project Team Members	ZoAnne Blackburn, Kirsten Alcser, Esther Ullman, Hueichun Peng, Youhong Liu, Dave Dybicki, Lisa Carn, Joel Devonshire, Emily Blasczyk, Dean Stevens, Winter Freeman
Other Project Names	CogUSA2014

Report Period	Apr, 2014 (COGUSA 6_7) **Project Phase** Implementing
Risk Level	On Track
Monthly Update	Interviewing has been going well. Response rate, efficiency, and production levels are tracking very close to our experience in Waves 4/5. SSL had to cut back on the number of hours scheduled due to smaller amount of sample available to call. We switched most of the no contact Web sample to phone mode (as we did at the same point in Waves 4/5).
Special Issues	none

Cost
Mar 31, 2014

Total Cost to Date (Direct + Indirect):	390,070.43
Estimated Cost at Completion (E$AC):	624,706.72
Total Budget:	604,914.00
Variance (Budget minus E$AC):	-19,792.72
Reason For Variance:	Over run is mainly due to miscommunication on incentives. They were only budgeted for $30 per respondent(1 interview per R). We pay $60 per respondent (2 interviews per R). Efficiencies on other items is reducing the amount of overrun.

Projections
Mar 31, 2014

Dollars Projected For Month:	37,333.97
Actual Dollars Used:	47,830.34
Variance (Projected minus Actual):	-10,496.37
Reason For Variance:	Additional Hosting charges hit the account this month that we did not anticipate. Survey Tech II hours were twice what was projected.

Measures

	Units Complete	RR	HPI
Current Goal:	1500	74%	2.5
Goal at Completion:	1945	90%	3.5
Current actual:	1512	74%	2.35
Estimate at Complete:	1945	90%	3.5
Variance:	0	0	0

Other Measures   Wave 6: 880; 385 Web, 495 Phone. Wave 7: 632; 301 Web, 331 Phone.

Project Name	Becoming A Man (BAM)
Project Mode	Primary: Face to Face Total of Modes: 1

Project Type	Sponsored Projects	**Project Status**	Current

Budget	**Direct Budget:**	269,059.00	**InDirect Budget:** 30,941.00	**Total Budget:**	300,000.00

Principal Investigator/Client	Dr. Jens Ludwig (University of Chicago)
Funding Agency	
IRB	**HUM#:** 00086048 **Period Of Approval:** 4/4/2014-4/3/201!
Project Team	**Project Lead:** Sarah Crane
	Budget Analyst: Dean E Stevens
	Production Manager: Sharon K Parker
	Senior Project Advisor: Nicole G Kirgis
	Production Manager: Veronica Connors-Burge
	Production Manager:
Description:	The purpose of this study is to complete in-person interviews with approximately 300 male students aged 12-18 from 12 pre-selected Chicago Public Schools.

Project Period	02/2014 - 10/2014	**Proposal No:**	SRO # 14-0033A01 & S
Data Collection Perio	05/2014 - 08/2014		
Security Plan	Yes		

Milestone Dates

PreProduction Start:02/15/2014	**Pretest Start:**
Pretest End:	**Recruitment Start:**02/28/2014
Staffing Completed:03/07/2014	**GIT Start:**04/24/2014
SS Train Start:04/26/2014	**SS Train End:**04/28/2014
DC Start:05/01/2014	**DC End:**08/29/2014

Other Project Team Members	Brant Zhang SurveyTrak
	Holly Ackerman WebTrak
	Jim Hagerman CAI
	Brad Goodwin Data Manager
	Andrea Pierce Help Desk
	Hongyu Johnson Proj Assistant
Other Project Names	

Report Period	Apr, 2014 (BAM)	**Project Phase**	Planning
Risk Level	Some Concerns		
Monthly Update	Becoming A Man spent the month of April planning for the launch of production on May 1, 2014. Study specific training was 4/26-4/28 in-person in Ann Arbor.		
Special Issues	With the launch of production May 1, we greatly need the 4 remaining funding sources in hand to avoid spending beyond the current $300,000.		

Cost		
May 31, 2014	**Total Cost to Date (Direct + Indirect):**	57,293.78
	Estimated Cost at Completion (E$AC):	786,773.94
	Total Budget:	300,000.00
	Variance (Budget minus E$AC):	-486,773.94
	Reason For Variance:	EAC is based on projections that include all 5 funding sources confirmed by client (University of Chicago). However, only 1 funding source is in hand.

Projections		
May 31, 2014	**Dollars Projected For Month:**	83,253.80
	Actual Dollars Used:	0.00
	Variance (Projected minus Actual):	0.00
	Reason For Variance:	

Measures

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

Other Measures

Project Name	Cognitive Economics 2013 (CogEcon2013 Web/Mail Study)
Project Mode	Primary: Mixed Total of Modes: 2

Project Type	Sponsored Projects	**Project Status**	Current

Budget	**Direct Budget:**	87,247.00	**InDirect Budget:**	47,550.00	**Total Budget:**	134,797.00

Principal Investigator/Client   Robert Willis (SRO)

Funding Agency

IRB	**HUM#:**	HUM00016894	**Period Of Approval:**	5/30/2013 - 5/29/:

Project Team	**Project Lead:**	Esther H Ullman
	Budget Analyst:	Janelle P Cramer
	Production Manager:	
	Senior Project Advisor:	Gina-Qian Yang Cheung
	Production Manager:	Maryam N Buageila
	Production Manager:	Stanley W Hasper

Description: This project would include all HRS Cognition and Aging respondents who participated in the first wave of the Cognitive Economics Internet/mail survey in 2008, except for those who refused to be part of the parent cognition study any longer, or that we know are deceased. The total sample size is approximately 900. Respondents will be invited to complete the survey in the same mode (mail or web) they used to complete the last wave of data collection. It is expected there will be some mode switching once production starts, and we will develop protocols and technical systems to allow for this. The assumed breakdown is 30-40% of participants will respond via mail and the remainder will complete the web survey. The web survey instrument will be programmed by project staff with some additional features and formatting added by SRO (including integration of special "slider" programming from the MiNYVan study), and the entire web survey project will be hosted (sample management system) by SRO.

Project Period	06/2013 - 03/2014	**Proposal No:**	SRO# 13-0040
Data Collection Perio	09/2013 - 01/2014		
Security Plan	Yes		

Milestone Dates

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

Other Project Team Members Winter Freeman (Project Associate), Emily Blasczyk, Hueichun Peng, Maryam Buageila

Other Project Names

Report Period	Apr, 2014 (CogEcon2013 Web/Mail Stu	**Project Phase**	Closing

Risk Level *On Track*

Monthly Update Client requested we try and find funds to return to parent for other work they need to do for analysis. We reduced projections for project and clarified with client this means no additional work expected on project and if they have requests we will need to discuss charging for that work. We also are not sure what the amount will be for voided checks but don't anticipate much more than $500-$700 based on prior waves.

Special Issues

Cost		
Apr 30, 2014	**Total Cost to Date (Direct + Indirect):**	128,517.71
	Estimated Cost at Completion (E$AC):	129,707.36
	Total Budget:	134,797.00
	Variance (Budget minus E$AC):	5,088.64
	Reason For Variance:	

Projections		
Apr 30, 2014	**Dollars Projected For Month:**	2,489.24
	Actual Dollars Used:	1,094.49
	Variance (Projected minus Actual):	1,394.75
	Reason For Variance:	still carrying projections for phone, postage and respondent payments that may not have hit yet.

Measures

	Units Complete	RR	HPI
Current Goal:	690	80%	
Goal at Completion:	690	80%	
Current actual:	693	81%	
Estimate at Complete:	693	81%	
Variance:		1%	

Other Measures

	Units Complete	RR	HPI
Current Goal:	690	80%	
Goal at Completion:	690	80%	
Current actual:	693	81%	
Estimate at Complete:	693	81%	
Variance:		1%	

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:***   575,516.00   ***InDirect Budget:*** 78,409.00   ***Total Budget:*** 653,925.00

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)
Funding Agency	MacArthur Foundation, Rockefeller Foundation, and UM Office of the Vice President for Research
IRB	***HUM#:*** HUM00031622 ***Period Of Approval:*** 05/15/2014
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 Perio	06/2013 - 10/2013
Security Plan	Yes

Milestone Dates

PreProduction Start:03/05/2013	***Pretest Start:***
Pretest End:	***Recruitment Start:***03/15/2013
Staffing Completed:04/16/2013	***GIT Start:***
SS Train Start:06/11/2013	***SS Train End:***06/12/2013
DC Start:06/17/2013	***DC End:***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
Other Project Names	Michigan Recession and Recovery Study

Report Period	Apr, 2014 (MRRS III) **Project Phase** Closing
Risk Level	*On Track*
Monthly Update	April activities have included weighting, archiving, and additional work on the final report.
Special Issues	

Cost
Mar 31, 2014

Total Cost to Date (Direct + Indirect):	612,063.83
Estimated Cost at Completion (E$AC):	632,717.71
Total Budget:	653,925.00
Variance (Budget minus E$AC):	21,207.29
Reason For Variance:	In winter 2013, additional workscope was budgeted for the callback effort although SRO informed the PIs that the callbacks might be completed within the current under-run. The agreement was that the PIs would pay SRO anything over the original budget. We have monitored to the full budget but also to the amount SRO has received ($636,280.91). We have overspent on hours but underspent on non-sal. We are projecting an under-run of $3,563.20 based on the amount of funding SRO has received.

Projections
Mar 31, 2014

Dollars Projected For Month:	34,765.28
Actual Dollars Used:	15,512.89
Variance (Projected minus Actual):	19,252.39
Reason For Variance:	Research and Development costs did not get processed in March. They have been forward projected to April. The research professor working on weighting did not charge any time for work in March. Have since confirmed the research professor now has access to the correct account code in ET.

Measures

	Units Complete	RR	HPI
Current Goal:	752	90%	4.34
Goal at Completion:	752	90%	4.34
Current actual:	751	90%	4.79
Estimate at Complete:			
Variance:			

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)

Funding Agency	National Institutes of Health - National Institute on Aging	
IRB	***HUM#:*** 00010551 ***Period Of Approval:*** 11/6/2013 - 11/5/:	
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	**Proposal No:**	10-0055R06
Data Collection Perio	06/2013 - 01/2014		
Security Plan	Yes		

Milestone Dates

PreProduction Start:01/01/2013	***Pretest Start:***04/11/2013
Pretest End:05/02/2013	***Recruitment Start:***03/15/2013
Staffing Completed:05/31/2013	***GIT Start:***06/15/2013
SS Train Start:06/17/2013	***SS Train End:***06/19/2013
DC Start:06/20/2013	***DC End:***02/17/2014

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)
Other Project Names	Panel Study of Income Dynamics 2013 - Families Aging and Use of Time (FAUST)

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Report Period	Apr, 2014 (DUST II 2013)	**Project Phase**	Closing

Risk Level   *On Track*

Monthly Update DUST is a diary study of English-speaking PSID respondents, age 60 and older, who completed the 2013 PSID interview, plus their spouse or communal partner. Each respondent is asked to complete two telephone interviews, each on specified days of the week, and report on their activities over a 24-hour period. Studies of this sort are often referred to as "Time Use" studies. There is a screening interview (CS) that is used to verify eligibility and to set specific appointments with the eligibles. The first time diary (TD1) averages about 55 minutes in length, while the second one (TD2) averages about 35 minutes. Both TD1 and TD2 also contain a small amount of non-diary content. The months of August and September have been spent in completing diaries. All of the CS sample has been attempted now (although a small bit of additional sample will be provided at the end of October), and a lot of effort is being made to complete more CS, which will in turn generate appointments for the diaries. We are working to try to determine whether or not the desired response rate will be attainable, given the status of the sample. Our initial projections were that the 80% response rate would be difficult to attain, however a number of interventions in the last month have helped to boost production and these now make that projected rate more likely. Following the interventions mentioned in the previous month's report, plans have begun to announce a bonus incentive of $25 additional that will be provided to all remaining sample member after they complete their diaries. The added bonus was implemented on December 2 and has had a positive effect on production activity, with a significant increase in the number of completed cover screens, even among lines that had never previously picked up the phone to speak with

us. In fact the number of never contacted lines has been cut by more than 50%; there are now fewer than 2.4% of the sample that has never been reached. Data collection was completed on February 17, 2014. Final data files were delivered to the PI on February 23. The primary project activities in March are activity coding and the survey director is preparing a final report for the PI. During this time period, March into April, revisions have been made to the final report, and, as noted above in "Reason for Variance", re-coding of some cases has been done in order to finalize the response rate calcultions.

Special Issues

A higher proportion of cases then anticipated have been found to be unable to complete the DUST interviews (Spanish, deceased, physically unable, etc.) thus reducing the number of possible cover screens that can be completed by approximately 12%. In January we revised the target goals to reflect this change. The current goal for completed CS is 1,336. A total of 1,331 were completed at the time of the end of data collection.

Cost
Apr 30, 2014

Total Cost to Date (Direct + Indirect):	985,286.51
Estimated Cost at Completion (E$AC):	991,819.26
Total Budget:	1,204,227.00
Variance (Budget minus E$AC):	212,407.74
Reason For Variance:	A larger than anticipated proportion of cases were found to be ineligible or could not be interviewed, due to them being non-English speaking, the need for a proxy interview, or physical limitations.

Projections
Apr 30, 2014

Dollars Projected For Month:	5,562.79
Actual Dollars Used:	9,458.26
Variance (Projected minus Actual):	-3,895.47
Reason For Variance:	The PI requested two changes to the final report; 1) a rewriting of the section on data model changes, and 2) an amendment to the final outcomes and response rate calculations; the latter required the re-coding of some of the cases, both for Cover screens and for diaries.

Measures

	Units Complete	RR	HPI
Current Goal:	1336	75.5%	8.78
Goal at Completion:	1336	80%	8.99
Current actual:	1331	76.9%	7.14
Estimate at Complete:	1331	76.9%	7.14
Variance:	0	-3.1%	1.85

Other Measures

Project Name	Health and Retirement Study 2014 (HRS 2014)
Project Mode	Primary: Mixed Total of Modes: 2
Project Type	Sponsored Projects

Project Status   Current

Budget	**Direct Budget:** 12,565,944.00 **InDirect Budget:** 4,523,742.00 **Total Budget:** 17,089,686.00
Principal Investigator/Client	David Weir (SRC) Mary Beth Ofstedal (SRC) Ken Langa (SRC)
Funding Agency	

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

Project Team	**Project Lead:**	Nicole G Kirgis
	Budget Analyst:	Richard Warren Krause
	Production Manager:	Stephanie Sullivan
	Senior Project Advisor:	Mary P Maher
	Production Manager:	Rebecca Gatward
	Production Manager:	Piotr Dworak

Description: The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort will be added. A series of physical measures and biomarkers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records and Veterans Administration (VA) records is requested. The HRS 2014 sample size is 23,029.

Project Period	01/2014 - 01/2015
Data Collection Perio	02/2015 - 12/2014
Security Plan	

Proposal No:

Milestone Dates

PreProduction Start:06/01/2013	**Pretest Start:**11/06/2013
Pretest End:11/20/2013	**Recruitment Start:**
Staffing Completed:	**GIT Start:**03/19/2014
SS Train Start:02/24/2014	**SS Train End:**02/26/2014
DC Start:02/28/2014	**DC End:**12/13/2014

Other Project Team Members	Jaime Koopman (Project Manager), Ian Ogden (Project Assistant), Heather Rejto (Project Assistant),
Other Project Names	

Report Period	Apr, 2014 (HRS 2014) **Project Phase** Initiation
Risk Level	On Track
Monthly Update	In April, we were fully staffed and in full production with our field on-staff interviewers, field new-hire interviewers, and SSL interviewers all trained and into data collection. We are currently in our 8th week of production. Production continues to go well. We surpassed our interview goals by 134 interviews last week and we are poised to have another strong week this week. Attrition rates are quite low compared to last wave at this time: We're currently at an overall field attrition rate of 4%. Last wave, it was 8% at this point in data collection. It is especially low for new hires (6% currently compared to 14% at this point last wave). SSL attrition is 0%. Several factors are expected to have contributed to the improvement in attrition rates: Use of "Test Up" for assessing skill level of applicants, better general and project-specific screening of applicants, and the use of Moodle for home-study preparation (interviewers were better prepared for training and understood the work in more depth).
Special Issues	We have had issues with DRI capturing all of the recordings it should be in both the SSL and the field (it has been more of a problem in the SSL than in the field). A fix was put in place this week (in the SSL) and so far, it seems to have solved the problem.

Cost
Mar 31, 2014

Total Cost to Date (Direct + Indirect):	5,062,042.00
Estimated Cost at Completion (E$AC):	17,089,686.00
Total Budget:	17,089,686.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	Please note: We are currently in the process of refining projections in order to bring the estimated cost to complete back in line with the budget.

Projections
Mar 31, 2014

Dollars Projected For Month:	1,902,033.54
Actual Dollars Used:	1,701,961.36
Variance (Projected minus Actual):	200,072.20
Reason For Variance:	Delay in certain non-salary costs hitting for training and supplies; projections will be moved forward.

Measures

	Units Complete	RR	HPI
Current Goal:	20,381	88.5%	7.4
Goal at Completion:	20,381	88.5%	7.4
Current actual:	5,078 (4/24/14)	23%	5.8
Estimate at Complete:	20,381	88.5%	7.4
Variance:	0	0	0

Other Measures   Physical Measures consent 97, Saliva consent 62, Blood consent 92

Project Name	HRS Cognitive Diagnosis Validation Study (CogVal)
Project Mode	Primary: Face to Face Total of Modes: 1
Project Type	Sponsored Projects

Project Status Current

Budget	**Direct Budget:** 23,075.00 **InDirect Budget:** 8,306.00 **Total Budget:** 31,381.00
Principal Investigator/Client	David Weir (ISR) Mary Beth Ofstedal (ISR) Ken Langa (ISR)
Funding Agency	
IRB	**HUM#:** **Period Of Approval:**
Project Team	**Project Lead:** Evanthia Leissou **Budget Analyst:** Richard Warren Krause **Production Manager:** Kathleen S Ladronka **Senior Project Advisor:** Mary P Maher **Production Manager:** **Production Manager:**
Description:	For this project a sample of 20 main subjects and 20 family informants of those main subjects will be interviewed in person. The goal will be to complete interviews with 3 main sample members who have normal cognitive function (as determined by Michigan Alzheimer's Disease Center [MADC] information), 4 with mild cognitive impairment, and 3 with dementia, as well as to interview a family informant of each of the main sample members. SRO will administer a one-hour cognitive assessment to the main subjects and a 15 minute proxy assessment to the family informants. Both of those interview types will be completed with a Blaise instrument. In addition, SRO will obtain feedback from respondents regarding their experiences with the assessments via a brief paper and pencil interview.
Project Period	01/2014 - 06/2014
Data Collection Perio	04/2014 - 05/2014

Proposal No: 13-0082R02

Security Plan

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	The team will be comprised of a survey director, production manager, two field interviewers, a Blaise programmer, help desk supervisor, help desk specialist, application programming supervisor, data ops research associate, office assistant, and a SPA.
Other Project Names	

Report Period	Apr, 2014 (CogVal)	**Project Phase**	Initiation
Risk Level	*Some Concerns*		

Monthly Update

The interviewer training was held on April 16th, as planned, but we were unable to start production interviewing for two reasons: 1) IRB approval has not been received, and 2) the licensed material for one of the cognitive tests has not arrived.

The IRB application was submitted on March 24th. The application was sent to Med IBR and after review a few edits were requested. Edits were completed and submitted on April 11th, and notification of contingencies pending was received on April 22nd. The contingency was addressed the same day, but as of April 24th we still do not have the formal approval notification.

Two of the cognitive tests used in the interview require license. The license for one test was received just a few days before the interviewer training, but the second license is still pending. Without the licensed material we are not able to confirm that Blaise programming is completely accurate and of course we are not able to start production interviewing.

The sample will be requested from the MADC once IRB approval is received, and production interviewing will start once we have received the test license.

In the mean time, project staff requested that we complete a few practice interviews with volunteer respondents in order to maintain the interviewer skills. We are in the process of scheduling these interviews with volunteers from project staff, their family and friends. Each interviewer will complete 3 practice interviews.

The practice interviews were not in the original work scope budgeted. This additional task is estimated to cost $526 for

interviewer time and incentives. The PI was notified and approved the expected cost associated with the task.

Special Issues   Delay in production start due to IRB approval and interview material.

Cost
Mar 31, 2014

Total Cost to Date (Direct + Indirect):	9,395.74
Estimated Cost at Completion (E$AC):	29,908.55
Total Budget:	31,381.00
Variance (Budget minus E$AC):	1,472.45
Reason For Variance:	

Projections
Mar 31, 2014

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

Measures

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

Other Measures

Project Name	HRS Consumption and Activity Study (HRS CAMS13)
Project Mode	Primary: Mail Total of Modes: 1

Project Type   Sponsored Projects   **Project Status**   Current

Budget   **Direct Budget:**   336,960.00   **InDirect Budget:**   121,307.00   **Total Budget:**   458,267.00

Principal Investigator/Client	David Weir (SRC) Mary Beth Ofstedal (SRC) Michael Hurd (RAND)
Funding Agency	National Institutes of Health

IRB   **HUM#:**   HUM00079949   **Period Of Approval:**   9/27/13 - 9/26/14

Project Team		
	Project Lead:	Maryam N Buageila
	Budget Analyst:	Richard Warren Krause
	Production Manager:	Stanley W Hasper
	Senior Project Advisor:	Mary P Maher
	Production Manager:	Heidi Marie Guyer
	Production Manager:	Bonnie C Andree

Description: CAMS 2013 is part of the Health and Retirement Study (HRS) umbrella of studies. The 2013 CAMS Mail Survey will consist of approximately 8784 Health and Retirement Study respondents, 6025 primary respondents who will be sent the full questionnaire, and 2759 spouse respondents who will receive one section of the questionnaire. The purpose of this effort is to collect additional data on household consumption and activities of daily living from participants in the Health and Retirement Study. There will be no face-to-face or telephone interviewing done during this study. All contact with the respondent will be via the mail.

Project Period   07/2013 - 04/2014   **Proposal No:**   14-0008
Data Collection Perio   10/2013 - 03/2014
Security Plan   Yes

Milestone Dates

PreProduction Start: 08/07/2013		**Pretest Start:**
Pretest End:		**Recruitment Start:**
Staffing Completed:		**GIT Start:**
SS Train Start:		**SS Train End:**
DC Start:		**DC End:**

Other Project Team Members   Maryam Buageila (management), Heidi Guyer (management), Stan Hasper (management), Heather Rejto (management), Bonnie Andree (management), Holly Ackerman(Programming), Joel Devonshire (Data Ops), Qi Zhu (Data Ops), Karen Donahue (Respondent Payment), Vicki Wagner (assembly coordinator)

Other Project Names   NA

Report Period   Apr, 2014 (HRS CAMS13)   **Project Phase**   Implementing

Risk Level   *On Track*

Monthly Update   The response rate continues in the 70% range. New panel respondents added in 2010/2011 continue to drag down the response rate - New Panel 63%, Existing Panel 73%. Refusal rates are consistent with previous waves. Questionnaires will be accepted and logged until the end of April. We have reconciled any inconsistencies with the HRS data team and are preparing for close out at the end of April.

Special Issues

Cost **Apr 09, 2014**		
Total Cost to Date (Direct + Indirect):	411,548.29	
Estimated Cost at Completion (E$AC):	411,895.12	
Total Budget:	458,267.00	
Variance (Budget minus E$AC):	33,196.17	
Reason For Variance:	The actual sample size was lower than given estimate used for the budget. Some printing and postage estimates were based on 2011 costs, but 2013 costs were actually lower.	

Projections **Apr 09, 2014**		
Dollars Projected For Month:	0.00	
Actual Dollars Used:	2,572.63	
Variance (Projected minus Actual):	0.00	
Reason For Variance:	No projections had been entered for March.	

Measures

	Units Complete	RR	HPI
Current Goal:	na	na	
Goal at Completion:	6000	70%	
Current actual:	5946	70.3%	
Estimate at Complete:	5950	70%	
Variance:	-50		

Other Measures

	Units Complete	RR	HPI
Current Goal:	na	na	
Goal at Completion:	6000	70%	
Current actual:	5946	70.3%	
Estimate at Complete:	5950	70%	

Project Name	HRS Health and Nutrition Mail Study (HRS HCNS)
Project Mode	Primary: Mail Total of Modes: 1
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 647,082.00 **InDirect Budget:** 258,491.00 **Total Budget:** 976,523.00
Principal Investigator/Client	David Weir (SRC) Kenneth Langa (SRC) Mary Beth Ofstedal (SRC)
Funding Agency	Health and Human Services (HHS), Department of-National Institutes of Health
IRB	**HUM#:** UM00080925 **Period Of Approval:** 10/12/13 - 10/11/
Project Team	**Project Lead:** Maryam N Buageila **Budget Analyst:** Richard Warren Krause **Production Manager:** Bonnie C Andree **Senior Project Advisor:** Mary P Maher **Production Manager:** Heidi Marie Guyer **Production Manager:**
Description:	The Health Care and Nutrition Mail Study (HCNS) is a part of the Health and Retirement Study (HRS) umbrella of studies. The content of the study includes sections on health care access similar to content included in the HRS 2011 mail survey to determine health care access and satisfaction pre-health care reform; food security measures; and a food frequency questionnaire. The benefits of collecting nutritional data on HRS include the large, national sample, and representation of minority populations, as well as the breadth of health, economic and social variable. This will provide important new opportunities for researchers across multiple disciplines. The questionnaire is expected to take approximately 40 minutes to complete. The protocol will be similar to other HRS mail studies although condensed slightly to accommodate HRS core data collection. An initial questionnaire mailing with a $20 incentive check will be followed up by reminder mailings at 3 weeks (questionnaire), 5 weeks (postcard), and 7 weeks (questionnaire). Printing, mailing, logging, and data scan will be done by Apperson. Respondent concerns will be addressed by SRO/SSL.
Project Period	07/2013 - 04/2014 **Proposal No:** 14-0024
Data Collection Perio	11/2013 - 02/2015
Security Plan	Yes

Milestone Dates

PreProduction Start: 08/01/2013	**Pretest Start:**
Pretest End:	**Recruitment Start:**
Staffing Completed:	**GIT Start:**
SS Train Start:	**SS Train End:**
DC Start: 11/20/2013	**DC End:** 04/30/2014

Other Project Team Members	Maryam Buageila, Project Lead; Heidi Guyer, HRS Study Director; Patty Maher, SPA; Bonnie Andree, Help Desk supervisor; Rick Krause, budget analyst; Holly Ackerman, WebLog programmer; Joel Devonshire, data manager; Winter Taylor, project assistant
Other Project Names	HRS Health Care and Nutrition Mail Study, HCNMS

Report Period	Apr, 2014 (HRS HCNS) **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	Questionnaires continued to trickle in during the month of April. Current English response rate is 68%. Spanish currently at 53%. Data collection will end at the end of April. Data issues slowed down scan and delivery, but the data is scheduled to be delivered to SRO and posted for HRS by midMay.
Special Issues	The expected overall response goal in the IRB application was at least 70%. The target response rate will not be reached. The PIs have been informed throughout data collection and are consoled by the fact that was have more than 8000 questionnaires logged which they feel is a substantial amount of data. Upon review, the HRS study staff felt that the questionnaire was quite dense and they will be reviewing the scanned documents for respondent comments. We at SRO will also review call records from help desk calls fro insight into respondent perception of the questionnaire.

Cost **Apr 09, 2014**		
Total Cost to Date (Direct + Indirect):	421,264.02	
Estimated Cost at Completion (E$AC):	657,234.17	
Total Budget:	976,523.00	
Variance (Budget minus E$AC):	319,243.48	

Reason For Variance: Budgets total amount allocated at time of HRS 6 year grant. Estimates made by HRS study staff were based on previous vendors and larger estimated sample size.

Projections
Apr 09, 2014

Dollars Projected For Month:	69,528.45
Actual Dollars Used:	61,155.13
Variance (Projected minus Actual):	8,373.32
Reason For Variance:	Expected charges for data scan and delivery to hit in March, but have not received the invoice for that service.

Measures

	Units Complete	RR	HPI
Current Goal:	na	na	na
Goal at Completion:	8400	70%	na
Current actual:	8073	66%	na
Estimate at Complete:	8100	68%	na
Variance:	-300	-2%	

Other Measures

Project Name	HRS Screening Initiatives (HRS Screening Initiatives)
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 512,452.00 **InDirect Budget:** 0.00 **Total Budget:** 512,452.00
Principal Investigator/Client	David Weir (UM Survey Research Center) Mary Beth Ofstedal (UM Survey Research Center)

Funding Agency
IRB   *HUM#:*   *Period Of Approval:*
Project Team   *Project Lead:*   Frost Alexander Hubbard
                   Budget Analyst: Richard Warren Krause
                   Production Manager: Theresa Camelo
                   Senior Project Advisor: Nicole G Kirgis
                   Production Manager:
                   Production Manager:

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.

Note: After a 9/18 meeting with the HRS PIs, we found out that due to the sequestration, funding for this initiative had been cut. We told the HRS PIs that we would keep the budget reined in. Thus, I have reduced the direct budget from $512,453 to $400,000.

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	09/2012 - 12/2014	**Proposal No:** SRO # 11-0010R01
Data Collection Perio	08/2013 - 10/2013	
Security Plan		

Milestone Dates		
	*PreProduction Start:*03/01/2013	*Pretest Start:*
	Pretest End:	*Recruitment Start:*
	Staffing Completed:	*GIT Start:*
	*SS Train Start:*08/20/2013	*SS Train End:*08/21/2013
	*DC Start:*08/22/2013	*DC End:*11/03/2013

Other Project Team Members

Frost Hubbard, Heidi Guyer, Wen Chang, Nicole Kirgis, Piotr Dworak, Richard Valliant, Sunghee Lee, Theresa Camelo, Daniel Tomlin, Joel Devonshire, Emily Blascyzk, Marsha Skoman, Holly Ackerman, Deb Wilson, Heather Reijto, Jamie Koopman, Rick Krause, Daniel Guzman

Other Project Names

Report Period Apr, 2014 (HRS Screening Initiatives)   **Project Phase**   Implementing

Risk Level *On Track*

Monthly Update

2013 SCREENING EXPERIMENT
Budget:
Our current cost to complete of the HRS Screening Experiment (direct dollars) is $257,619 This is about $9,000 more than what we projected at the beginning of data collection. The reasons for this slight overrun are detailed in the final report, which I plan to have finished by the end of May.

Final Reports:
In process of writing up. Had set an initial deadline of January 17 to finish, but got sidetracked by the HRS proposal to the NIA for funding the 2016 screening work. All of my HRS time in January and February was focused on this proposal, the 2016 sample design and the LBB Tracking Experiment.

DATA ANALYSIS PROJECTS (Cost to Date: $75,777. Cost at Completion: $141,933)

Exploration with the Census Bureau
This work has ended. We will be sending them some of our own internal results looking at Aristotle and MSG data and how well those two data sources identified HHs eligible for the HRS LBB birth cohort in reciprocation for all of the work they did in matching our HRS addresses to their own data and sending us results.

Aristotle
In agreement with what the Census Bureau provided, the analysis by Paul Burton and Emily B. looking at the accuracy of the Aristotle and MSG using NSFG 2011-2013 HH listing outcomes in terms of predicting LBB eligible HHs found that Aristotle was slightly more better than MSG, but combining the two data sources produced even better results. By combining the two data sources, I mean that if either source identified the HH as an LBB eligible HH, we would consider place it into a "Likely LBB HH" stratum for sampling purposes and oversample within that stratum.

HRS2016 Sample Design:
The 2016 HRS sample design has been set. We will oversample PSUs more likely to contain LBB eligible HHs, oversample segments more likely to contain African Americans and Hispanics, and oversample households with segments based on the age and race-ethnicity data we purchased for all listed HUs from Aristotle AND MSG. The proposed 2016 sample design, led by Richard Valliant, was submitted to NIA in early March.

Our next steps in terms of the sample design are twofold. First, Sunghee Lee, Daniel Guzman, Paul Burton and I have started doing a PSU variance component analysis to see if we can reduce the number of HRS PSUs in the design from 75 to something in the mid 60s. This would greatly help reduce data collection costs as we would not need to hire as many interviewers and would reduce travel costs.

Second, Paul Burton and Daniel Guzman have begun compiling the most recent Census data to start creating a PSU frame with population and HH level statistics.

LBB Tracking Experiment (Total Spent thus far $21,817.84. Cost at Complete: $44,565.62)
In April, Kyle Kwaiser processed all of the address updates for each person in the LBB tracking experiment from Lorton Data and Accurint. In early May, we will send out the 2014 HRS newsletter to 2/3's of the address in mid-April. The experimental design calls for 2/3's of the LBBs in the experiment to be sent an HRS newsletter each year. The remaining third will only be tracked passively via these commercial data sources until we attempt to locate them and request participation in the HRS in 2016.

Special Issues

Cost
Apr 30, 2014

Total Cost to Date (Direct + Indirect):	361,455.00
Estimated Cost at Completion (E$AC):	453,720.00
Total Budget:	512,452.00
Variance (Budget minus E$AC):	58,731.00
Reason For Variance:	

Projections
Apr 30, 2014

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

Measures

	Units Complete	RR	HPI
Current Goal:	942	.85	2.4
Goal at Completion:	942	.85	2.4
Current actual:	905	.79	2.42
Estimate at Complete:	905	.79	2.4
Variance:	-137	-0.22	-0.6

Other Measures

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)
Funding Agency	State of Michigan Department of Education
IRB	**HUM#:** 00067090 **Period Of Approval:** 8/1/2012-12/31/2(

Project Team

Project Lead:	Stephanie A Chardoul
Budget Analyst:	Christine Evanchek
Production Manager:	Barbara Aghababian-Homburg
Senior Project Advisor:	Stephanie A Chardoul
Production Manager:	Meredith A House
Production Manager:	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 Perio	08/2012 - 05/2013		
Security Plan	Yes		

Milestone Dates	

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

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

Other Project Names

Report Period Apr, 2014 (MCEE) **Project Phase** Closing

Risk Level *Not Rated*

Monthly Update

The contract has officially been extended through the end of December.

The Teacher survey is closed and completed data files have been delivered to the PI. Raw files showed 1116 cases completed out of 2529 (RR=44.1%); 92 partials (3.6%); 1321 not started (52.2%).

The principal survey will be closed this month. The survey was extended to accommodate the fact that many administrators are almost unreachable and/or do not have time during the summer. They are usually on vacation during July, and then in August they are gearing for the re-opening of school. To encourage participation multiple reminder emails were sent. Phone calls were also made to encourage participation during August and September. Interim data was delivered to the PI early in September. To date the 75% of the principal/administrator sample have completed the survey.

We are currently completing some data processing tasks; teacher observation, student assessment, and demographic files. We have outlined the plan for the final SRO report/documentation and have started working on that.

Special Issues

Cost
Mar 31, 2014

Total Cost to Date (Direct + Indirect):	3,284,794.92
Estimated Cost at Completion (E$AC):	3,284,794.92
Total Budget:	4,900,000.00
Variance (Budget minus E$AC):	1,615,205.08
Reason For Variance:	

Projections
Mar 31, 2014

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

Measures

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

Other Measures

Project Name	Monitoring the Future 2014 Base Year (MTF BY 2014)
Project Mode	Primary: Class SAQ Total of Modes: 1

Project Type	Sponsored Projects	**Project Status**	Current
Budget	**Direct Budget:** 606,449.00	**InDirect Budget:** 336,579.00	**Total Budget:** 943,028.00

Principal Investigator/Client	Lloyd Johnston (SRC) Jerry Bachman (SRC) Patrick O'Malley (SRC)
Funding Agency	

IRB	**HUM#:** 00063656	**Period Of Approval:** 8/7/2013-8/6/201⁴	

Project Team	**Project Lead:**	Lloyd Fate Hemingway
	Budget Analyst:	Christine Evanchek
	Production Manager:	Sarah Crane
	Senior Project Advisor:	Jody Dougherty
	Production Manager:	
	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	10/2013 - 07/2014	**Proposal No:**	11-0050R01
Data Collection Perio	02/2014 - 06/2014		
Security Plan	Yes		

Milestone Dates

PreProduction Start:11/01/2013	**Pretest Start:**
Pretest End:	**Recruitment Start:**11/01/2013
Staffing Completed:11/30/2013	**GIT Start:**
SS Train Start:01/07/2014	**SS Train End:**01/24/2014
DC Start:02/15/2014	**DC End:**05/31/2014

Other Project Team Members	Marsha Skoman Jennie Williams Holly Ackerman
Other Project Names	

- -

Report Period	Apr, 2014 (MTF BY 2014)	**Project Phase**	Implementing
Risk Level	*Some Concerns*		

Monthly Update	135 school administrations have been completed so far in April, more than 1/3 of the expected total (between 380-390), making it a very productive month. Administrations that had been postponed due to weather took place early in the month. Unfortunately, the MTF project callers continued to encounter resistance from schools, and it appears that they will fall short of their goal for the number of schools in the sample. This does mean that costs for budget year 3, which starts May 1, are likely to be lower than originally projected.
Special Issues	Budget year does not match Data Collection period, which is in budget years 2 and 3. Costs reported are for budget year 2. For years 1 and 2, project has projected underrun of $21,480.25. So overall the project is within target. Next month's MPR will report on budget years 2 and 3 while data collection in year 2 continues.

Cost **Apr 30, 2014**	**Total Cost to Date (Direct + Indirect):**	747,200.57
	Estimated Cost at Completion (E$AC):	954,421.45
	Total Budget:	943,028.00
	Variance (Budget minus E$AC):	-11,393.40
	Reason For Variance:	The project has several Field Researchers who work on TLs on other projects. While this was done to keep down travel costs, it led to higher salary costs. (See Special Issues below.)

Projections **Apr 30, 2014**	**Dollars Projected For Month:**	155,453.69
	Actual Dollars Used:	166,805.71
	Variance (Projected minus Actual):	-11,352.02
	Reason For Variance:	The amount of School Administration team done by FRs who work as TLs on other projects. (See special issues below).

Measures

	Units Complete	RR	HPI
Current Goal:			30.0 Hrs/School
Goal at Completion:			28.0 Hrs/School
Current actual:	245		32.5 Hrs/School
Estimate at Complete:	390		28.0 Hrs/School
Variance:			

Other Measures

	Units Complete	RR	HPI
Current Goal:			30.0 Hrs/School
Goal at Completion:			28.0 Hrs/School

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

Project Type	Sponsored Projects	**Project Status**	Current

Budget	**Direct Budget:** 168,852.00	**InDirect Budget:** 93,713.00	**Total Budget:** 262,564.00

Principal Investigator/Client	Megan Patrick (UM-SRC)
Funding Agency	U.S. Department of Health & Human Services, National Institutes of Health
IRB	**HUM#:** 00081391 **Period Of Approval:** 8/1/2012 - 4/30/2(
Project Team	**Project Lead:** Donnalee Ann Grey-Farquharson
	Budget Analyst: Christine Evanchek
	Production Manager: Lloyd Fate Hemingway
	Senior Project Advisor: Gina-Qian Yang Cheung
	Production Manager:
	Production Manager:

Description:

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

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

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

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

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

Project Period	08/2012 - 08/2015	**Proposal No:**	12-0003R04
Data Collection Perio	04/2014 - 08/2014		
Security Plan	Yes		

Milestone Dates

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

Other Project Team Members	Gina-Qian Yang Cheung, Donnalee Grey-Farquharson, Hueichun Peng, Andrew Piskorowski, Aaron Pearson, Max Malhotra, Lloyd Hemingway
Other Project Names	MTF Web

Report Period	Apr, 2014 (MTF-WPSP Year 2)	**Project Phase**	Implementing
Risk Level	Not Rated		

Monthly Update

All testing went well and the survey went live on April 10, 2014 without a hitch. Of the 3 conditions (PAPI, URL in mail, Email) the email group is by far the one with the highest response rate so far. All condition 2 and condition 3 cases were completed via the web.

163 completed in condition 1
159 completed in condition 2
224 completed in condition 3

Planning for Non-response calling is currently happening. Training for non-response (NR) calling will be on May 16th

from 10-6. NR calling begins May 19th.

Special Issues

Cost
Mar 31, 2014

Total Cost to Date (Direct + Indirect):	130,393.27
Estimated Cost at Completion (E$AC):	210,375.99
Total Budget:	262,564.00
Variance (Budget minus E$AC):	52,188.01
Reason For Variance:	

Projections
Mar 31, 2014

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

Measures

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

Other Measures

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

Project Status	Current

Budget	**Direct Budget:**	29,713,370.00	**InDirect Budget:**	10,439,833.00	**Total Budget:**	40,153,203.00

Principal Investigator/Client	William Mosher (NCHS) Mick Couper (ISR)
Funding Agency	NCHS, CDC, NICHD

IRB	**HUM#:**	0002716	**Period Of Approval:**	7/17/13 - 7/17/14

Project Team	**Project Lead:**	Heidi Marie Guyer
	Budget Analyst:	Nancy Oeffner
	Production Manager:	Sharon K Parker
	Senior Project Advisor:	Mary P Maher
	Production Manager:	Maureen Joan O'Brien
	Production Manager:	Daniel Tomlin

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 Perio	09/2011 - 06/2019		
Security Plan	Yes		

Milestone Dates

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

Other Project Team Members Other Project Names	Chrissy Evanchek--Budget Analyst, Jennifer Kelley--Project Manager

- -

Report Period	Apr, 2014 (NSFG 2010-2020)	**Project Phase**	Implementing

Risk Level	*On Track*
Monthly Update	We are currently in quarter 11 of data collection. Quarter 11 (Q11) runs from 3/30/14 - 6/21/14. The improved weather had a definite impact in the first few weeks of the quarter with higher weekly average hours and calls placed during peak call windows. The interviewer observations collected on the smart phone will be merged with the data collected in Blaise. Once that process is in place, the remaining interviewers will be trained on the collecting the observations using the mobile phone. The incentive experiment is continuing for the third quarter. The experiment does appear to improve efficiency in that interviews are completed with fewer calls when assigned to the $60 group compared to the $40 group. However, response rates do not appear to increase. There is some indication of variation in the types of respondents that the $60 incentive brings into the sample. We will soon begin to focus on year 4 hiring and training plans.
Special Issues	We have loaded the full contract budget into the CRS (instead of only Cycle 8). We currently show an overrun in the CRS until we can work on projection edits for Cycles 9 and 10 to get the budget back in-line. Contract modification 7 raised the contract amount by $95,037 to fund the incentive experiment (this modification has now been processed). Modification 8 provided additional funding to the contract. Modification 9 changed the field director to Heidi Guyer and will also provides further details (flexibility) for data destruction at the end of the contract.

Cost Apr 07, 2014		
Total Cost to Date (Direct + Indirect):	12,873,304.15	
Estimated Cost at Completion (E$AC):	40,153,203.00	
Total Budget:	40,153,203.00	
Variance (Budget minus E$AC):	0.00	
Reason For Variance:	A larger variance is shown in CRS. Projections through 2020 will be updated	

Projections
Apr 07, 2014

Dollars Projected For Month:	420,425.44
Actual Dollars Used:	380,806.61
Variance (Projected minus Actual):	39,618.83
Reason For Variance:	March actual costs were lower than projected primarily due to the lower yield of interviews.

Measures

	Units Complete	RR	HPI
Current Goal:	1250	75%	9.0
Goal at Completion:	1250	75%	9.0
Current actual:	355	27%	9.87
Estimate at Complete:	1250	75%	10.0
Variance:	0	0	1.0

Other Measures

Project Name	Panel Study of Income Dynamics 2013 (Family Economics Study) (PSID 2013)
Project Mode	Primary: Telephone Secondary: Face to Face Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 3,238,350.00 **InDirect Budget:** 1,797,280.00 **Total Budget:** 5,035,630.00
Principal Investigator/Client	Charles Brown (Director) (ISR-SRC) Vicki Freedman & Narayan Sastry (Associate Dirs) (ISR-SRC) Katherine McGonagle (Assistant Dir) (ISR-SRC)
Funding Agency	
IRB	**HUM#:** HUM00062417 **Period Of Approval:** 1/17/2014 - 1/16/.
Project Team	**Project Lead:** Shonda R Kruger-Ndiaye **Budget Analyst:** Steve Bright **Production Manager:** Sara D Freeland **Senior Project Advisor:** Stephanie A Chardoul **Production Manager:** _UnAssigned **Production Manager:** 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	04/2012 - 03/2014	**Proposal No:** SO # 10-0056
Data Collection Perio	03/2013 - 12/2013	
Security Plan	Yes	

Milestone Dates

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

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
Other Project Names	Family Economics Study (FES)

Report Period	Apr, 2014 (PSID 2013)	**Project Phase** Closing
Risk Level	*On Track*	
Monthly Update	March work was limited to finalizing costs on the project. Please note that we anticipate that the $19,827.20 projected, Direct overrun will be reduced slightly as requested ET	

corrections are made.

Special Issues

Cost
Mar 31, 2014

Total Cost to Date (Direct + Indirect):	5,027,774.46
Estimated Cost at Completion (E$AC):	5,027,774.46
Total Budget:	5,035,630.00
Variance (Budget minus E$AC):	7,854.54
Reason For Variance:	The Total Cost-to-Complete is now estimated to be underrun (as shown above) but the Direct Cost-to-Complete is estimated be $19,827.20 overrun. This discrepancy is due to the projections of Indirects being made in CRS at a different rate than is authorized for one of our funders. So, we always have an Indirect surplus. The direct overrun is less than was projected last month and is $33,590.40 *less* than the overrun that was estimated at the time of the March baseline projection with Project Staff. Since then, a large variety of factors have influenced costs in both directions. It's difficult to pin this small variation to a single or even a small set of factors.

Projections
Mar 31, 2014

Dollars Projected For Month:	0.00
Actual Dollars Used:	-17,804.77
Variance (Projected minus Actual):	17,804.77
Reason For Variance:	We had no March hours projected because work concluded in Feb. The only March hours we expected hit were due to the very final hours of the contingent staff coders' work (hours worked in Feb, hitting in March). These were so trivial that we didn't try to estimate them. The Actual Dollars used were negative because of two negative non-sal entries by our budget analyst (to remove R payments from SRO's budget and to reflect removal of a misdirected university charge). Further, some of the actual charges were misdirected and will be corrected. So, ultimately, the Actual Dollars used in March will be even lower.

Measures

	Units Complete	RR	HPI
Current Goal:	9,171	92.8% overall	5.8
Goal at Completion:	9,171	92.8% overall	5.8
Current actual:	9,107	92.1% overall	6.05
Estimate at Complete:	9,107	92.1% overall	6.05
Variance:	64	.7	-.25

Other Measures

Note: HPI is Cumulative Production HPI.

Target completes and RR reflect numbers projected as of 9/30/2013 and presented to PIs 10/1/2013.

Project Name	Panel Study of Income Dynamics Childhood Experiences Web/Mail Project (PSID-CE (aka FES-CE))
Project Mode	Primary: Web Secondary: Mail Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	***Direct Budget:*** 284,283.00 ***InDirect Budget:*** 157,778.00 ***Total Budget:*** 442,061.00
Principal Investigator/Client	Vicki Freedman (U of M Survey Research Center) James Smith (RAND) Kate McGonagle (U of M Survey Research Center)
Funding Agency	
IRB	***HUM#:*** HUM00051456 ***Period Of Approval:*** Approved w/Cont
Project Team	***Project Lead:*** Shonda R Kruger-Ndiaye ***Budget Analyst:*** Steve Bright ***Production Manager:*** Anthony Romanowski ***Senior Project Advisor:*** Stephanie A Chardoul ***Production Manager:*** ***Production Manager:***
Description:	PSID-CE is the first web survey associated with the PSID. The sample for the study is comprised of virtually all PSID respondents and spouses and will include approximately 13,100 individuals. Potential respondents will be invited either to complete an on-line instrument or—in the case of those who have not reported Internet access at home—given the option to complete the instrument on-line or on paper. Follow-up efforts will consist of both hard-copy and e-mailed reminders as well as non-response calling. The interview content includes questions about childhood health conditions, socioeconomic status, neighborhood(s), friendships, school experiences, criminal activity as well as the parenting experienced as children. To help respondents accurately recall their ages when various events occurred, the on-line version of the questionnaire features a custom-built dynamic life history calendar. Due to the sensitivity of the content, a Certificate of Confidentiality will be obtained.
Project Period	08/2013 - 10/2014 **Proposal No:** 11-0026R06
Data Collection Perio	05/2014 - 09/2014
Security Plan	Yes

Milestone Dates

PreProduction Start:08/01/2013	***Pretest Start:***02/10/2014
Pretest End:03/31/2014	***Recruitment Start:***03/10/2014
Staffing Completed:	***GIT Start:***
SS Train Start:	***SS Train End:***
DC Start:05/08/2014	***DC End:***09/30/2014

Other Project Team Members	Emily Blasczyk--Data Manager and Report Programmer Hueichun Peng--Custom Project SMS Programmer Donnalee Grey-Farquharson--Custom Project SMS Design/Specifications Robert Fenton--Illume Programmer Youhong Liu--Illume Programmer Consultant Meredith House--Web Consultant Becky Loomis & Gail Arnold--R Materials Assistance
Other Project Names	Family Economics Study Childhood Experiences Project PSID Web/Mail

Report Period	Apr, 2014 (PSID-CE (aka FES-CE)) **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	April work (to-date) included: • Illume testing. • Testing of a mobile style sheet (separately funded). • On-going programming and testing of custom SMS. • Follow-up protocol testing. • Report specification and programming. • Revision of PAPI instrument (3 major overhauls to-date). • R materials formatting. • On-going Budget Monitoring including reassessment of future projections. • Receipt of a Certificate of Confidentiality. Note: On 4/24 SRO and the PIs agreed to delay the 5/1 launch to 5/8. The main drivers in this decision were the turn-around time require for IRB to remove the CoC contingency and approve the amendment containing the R materials. A 2nd amendment will then be necessary to approve the PAPI. The PAPI is also still pending finalization.

Special Issues

The current design deviates in some possibly significant ways from the scope associated with the approved budget. This has been discussed with the PIs. Given the number of unknowns, the PIs request the option to make changes during production in response to production outcomes and to work in collaboration with SRO to assess the cost implications of those decisions. They may opt to authorize costs beyond the approved budget if necessary to address production challenges.

The PIs insisted upon a target response rate of 85% during the budgeting process but have been warned by SRO that that target is higher than we would advise/expect and may be unattainable.

Cost
Mar 31, 2014

Total Cost to Date (Direct + Indirect):	121,798.36
Estimated Cost at Completion (E$AC):	437,490.74
Total Budget:	442,061.00
Variance (Budget minus E$AC):	4,570.26
Reason For Variance:	I don't actually predict an underrun on this project. Projections have yet to be updated for March. I don't know if the surplus (only $2,938.48 Direct) would best be applied toward additional SSL salary or toward R materials, both of which will likely exceed budget.

Projections
Mar 31, 2014

Dollars Projected For Month:	22,671.46
Actual Dollars Used:	25,725.95
Variance (Projected minus Actual):	-3,054.49
Reason For Variance:	Note: Direct dollars projected had to be calculated as they're not explicitly included in the cost report.

The main driver for the variance was that our custom SMS programmer had been charging significantly fewer hours than projected in past months and in March charged 177% of the March projection. This is likely not an error. I believe past months' charges may have been artificially low as she is exempt and cannot charge all of the significant time she's working. My (Shonda's) time has also been over projection for the past 3 months.

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:	11,172	85%	.8
Current actual:			
Estimate at Complete:			
Variance:			

Other Measures

Project Name	Social Relations, Aging and Health: Competing Theories and Emerging Complexities, Wave 3 (SRS W3)
Project Mode	Primary: Telephone Secondary: Web Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 950,999.00 **InDirect Budget:** 527,805.00 **Total Budget:** 1,478,804.00
Principal Investigator/Client	Toni Antonucci (SRC) Kira Birditt (SRC)
Funding Agency	
IRB	**HUM#:** **Period Of Approval:**
Project Team	**Project Lead:** Esther H Ullman **Budget Analyst:** Bethany Benton **Production Manager:** Joseph Matthew Matuzak **Senior Project Advisor:** Kirsten Haakan Alcser **Production Manager:** Maryam N Buageila **Production Manager:**
Description:	SRO's work on this project will include the conduct of centralized telephone interviews with panel respondents and identified members of their 'core network'. After completing their centralized telephone interview, all respondents (both panel respondents and core network members) will be asked to complete monthly web-based journals for twelve months to demonstrate instances where they have relied on their "core network" to assist in dealing with life course events that they have faced, or in the case of core network members (CNMs) instances where they have provided support to the panel respondents in dealing with life course events that they have faced. The sample for the panel respondents will include the surviving members of the 1993 adult and child Social Relations cohorts (panel).
Project Period	01/2014 - 01/2017 **Proposal No:** SRO #13-0020
Data Collection Perio	
Security Plan	

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	Rebecca Loomis, Dave Dybicki, Dan Zahs, Hueichun Peng, Max Malhortra, Minako Edgar, Robert Fenton, Shaowei Sun
Other Project Names	

Report Period	Apr, 2014 (SRS W3) **Project Phase** Planning
Risk Level	*On Track*
Monthly Update	Weekly meetings are being held with Project Staff to assist in clarifying details of project. Programming and testing scheduled for April, Pretest in May, training end of June with production start beginning of July. Strategy is to wait for re-budget until real production costs are known. Client wants highest possible response for baseline interviews. Follow-up on journals may need to be reduced to save funds and/or client may have other ideas for a re-budget or additional funds.
Special Issues	The budget will require about a 20% reduction, the first year funds came with the reduction. It is a smoothed 5 year budget so "over-runs" may appear for the first year as pre-production activities get underway.

Cost **Apr 30, 2014**		
Total Cost to Date (Direct + Indirect):	33,662.46	
Estimated Cost at Completion (E$AC):	1,381,300.29	
Total Budget:	1,478,804.00	
Variance (Budget minus E$AC):	-175,924.71	
Reason For Variance:		

Projections **Apr 30, 2014**		
Dollars Projected For Month:	34,102.41	
Actual Dollars Used:	9,858.45	
Variance (Projected minus Actual):	24,243.96	
Reason For Variance:	We had spread non-salary costs evenly through fiscal year although these expenses have not yet hit. Same for some of the salary hours (due to late receipt of specs from client).	

Measures

	Units Complete	RR	HPI
Current Goal:	1639		
Goal at Completion:	1639	.75	
Current actual:			
Estimate at Complete:			
Variance:			

Other Measures   we will also be collecting monthly web journals and will establish target goals for these

Project Name	Surveys of Consumer Attitudes (SCA 2014)
Project Mode	Primary: Telephone
Project Type	Sponsored Projects

Project Status   Current

Budget	***Direct Budget:*** 649,196.00	***InDirect Budget:*** 0.00	***Total Budget:*** 649,196.00

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

IRB   ***HUM#:***   B03-00002545-R2   ***Period Of Approval:***   thru 10/30/2014

Project Team
- ***Project Lead:***   Joseph Matthew Matuzak
- ***Budget Analyst:***   Steve Bright
- ***Production Manager:***
- ***Senior Project Advisor:***   Mary P Maher
- ***Production Manager:***   Andrea Sims
- ***Production Manager:***

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	01/2014 - 12/2014
Data Collection Perio	01/2014 - 12/2014
Security Plan	Yes

Proposal No: 14-0038

Milestone Dates

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

Other Project Team Members	Dave Dybicki Ann Munster Pamela Swanson Jennie Williams LaVelvet Harrison
Other Project Names	

Report Period	Apr, 2014 (SCA 2014)	**Project Phase**	Implementing

Risk Level   *Some Concerns*

Monthly Update   SCA completed the April study on time, with 506 completed interviews, 341 RDDs and 165 Recons. The RDD split was 134 landline cases and 207 cell phones. We struggled early with hours this month and went into prelim fairly far behind, and needed to add a lot of hours to finish on time. Our HPI was about 2.63, the average interview length was more that ten minutes longer than the previous month, at 32.4 minutes, and our average number of attempts per interview was just slightly higher than the previous month, ending up at 2.59, compared to March's average of 2.48 and February's average of 2.90.

Special Issues   We trained seven on-staff interviewers from other projects for SCA, and at this point all but one has been certified and moved into production. We will train and additional four new hires next week. This month was our least efficient since last September in terms of interviewer hours, the result of a combination of new people, a longer instrument, the fact that April is historically difficult for SCA, and a lower level of overall interviewer efficiency. We will attack the latter in May by additional training, monitoring, and reports being given to interviewers, and will likely take advantage of our large number of newer interviewers by rotating some of our historically less efficient interviewers off the schedule and/or project.

Cost
Apr 10, 2014

Total Cost to Date (Direct + Indirect):	153,624.10
Estimated Cost at Completion (E$AC):	632,931.14
Total Budget:	649,196.00
Variance (Budget minus E$AC):	16,264.86
Reason For Variance:	We have been relatively efficient thus far in the year, but will likely need to revisit the budget as we go forward, as several of the presumptions on which the budget was formulated have changed, most specifically interview lengths and the sample mix.

Projections
Apr 10, 2014

Dollars Projected For Month:	57,717.66
Actual Dollars Used:	4,872.94
Variance (Projected minus Actual):	53,564.00
Reason For Variance:	Longer instrument, increased sampling costs due to scope change, higher number of interviewer hours needed for completion.

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:	500	10	2.30
Current actual:			
Estimate at Complete:	506	10	2.63
Variance:	6	0	0.63

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   *Direct Budget:*   426,980.00   *InDirect Budget:*   0.00   *Total Budget:*   426,980.00

Principal Investigator/Client
John Callewaert (Graham Environmental Sustaiability Institute)
Robert Marans (ISR)
Michael Schriberg (LSA UG: Environment)

Funding Agency

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

Project Team
Project Lead:	Cheryl Wiese
Budget Analyst:	Rhonda R McCammon
Production Manager:	
Senior Project Advisor:	Stephanie A Chardoul
Production Manager:	
Production Manager:	

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 Perio   10/2012 - 12/2016
Security Plan

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:*11/04/2013	*DC End:*12/23/2013

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.

Other Project Names

Report Period   Apr, 2014 (SCIP)   **Project Phase**   Initiation

Risk Level   *Not Rated*

Monthly Update   No update data for April available.

Special Issues

Cost
May 31, 2014
Total Cost to Date (Direct + Indirect):	0.00
Estimated Cost at Completion (E$AC):	0.00
Total Budget:	426,980.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	

Projections
May 31, 2014
Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	

Measures

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

Other Measures

Project Name	The Role of Housing in Healthy Child Development (H&C)		
Project Mode	Primary: Face to Face Total of Modes: 1		
Project Type	Sponsored Projects	**Project Status**	Current
Budget	**Direct Budget:** 543,892.00	**InDirect Budget:** 81,584.00	**Total Budget:** 625,476.00

Principal Investigator/Client
Dan Keating (University of Michigan)
Sandra Newman (Johns Hopkins University)
Tama Leventhal (Tufts University)

Funding Agency

IRB	**HUM#:**		**Period Of Approval:**
Project Team	**Project Lead:**	Barbara Lohr Ward	
	Budget Analyst:	William Lokers	
	Production Manager:	Barbara Aghababian-Homburg	
	Senior Project Advisor:	Kirsten Haakan Alcser	
	Production Manager:	Evanthia Leissou	
	Production Manager:		

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

We will conduct three waves of data collection, separated by about 20 months, with families in Seattle, Denver, Dallas, and Cleveland. In-person interviews will be completed with ~2,650 parents and ~3,350 children ages 3-8. Half of the sample of households will be applicants to local Public Housing Authorities (PHA) for a federal housing voucher, with winners selected randomly by lottery. This experimental sample will include both winners (treatment group) and losers (control group). The other half of the sample of households will be generated by random screening located in census blocks that vary by household income weighted toward lower-income blocks. Each interview will last approximately two hours, and will include the collection of anthropometric measures (height, weight, waist and hip measures, blood pressure monitoring), Woodcock-Johnson cognitive tests of children, dried blood drawn from caregivers and children via pinprick (experimental sample only), and measurement of room sizes using a laser tape measure. Wave 2 interviews will be completed with these same Wave 1 households in years 2/3 and Wave 3 interviews will be completed in years 4/5 of the study.

Project Period	07/2013 - 03/2016	**Proposal No:**	13-0071, 14-0018,
Data Collection Perio	09/2014 - 03/2016		

Security Plan

Milestone Dates

PreProduction Start:07/01/2013	**Pretest Start:**04/11/2014
Pretest End:05/10/2014	**Recruitment Start:**04/01/2014
Staffing Completed:07/18/2014	**GIT Start:**
SS Train Start:	**SS Train End:**
DC Start:	**DC End:**

Other Project Team Members
Barbara Ward (Proj Lead), Eva Leissou (Surv Dir), Genise Pattullo (Tech Lead), Judi Clemens, (SSS), DonnaLee Grey-Farquharson (SSI), Becky Loomis, Mike Zeddies, Winter Freeman, Alicia Giordimaina (SSAs), Barb Homburg (Prod Mgr Lead), Veronica Connors-Burge (Prod Mgr), Jim Hagerman (Blaise), Holly Ackerman (Weblog/Webtrak), Pam Swanson, Jeff Smith (SurveyTrak), Emily Blasczyk (Data Mgt), Andrea Pierce (Helpdesk)

Other Project Names

Report Period	Apr, 2014 (H&C)	**Project Phase**	Implementing

Risk Level *Attention!*

Monthly Update Survey Research Operations
Housing & Children
Monthly Report
Period Covered: April 2014

Prepared by: Barbara Ward, SRO

Submitted to: Dan Keating, Kirsten Alcser, Patty Maher (SRC)

During April 2014, SRO activities included the following:
Task 1: Management, Budget and Work Plan
• 	Prepared and delivered monthly activity report for Mar 2014.
• 	Updated staffing plan and monitored staff hours
• 	Budget/Contracts/Cost Estimate:
o 	Updated staffing estimates and published expectations for staffing hours and deliverables.
o 	Delivered three ballpark budget estimates
☐ 	Three inclusive revised proposals:
• 	Voucher sample only, replacing population sample in Cleveland, Dallas, and Seattle with additional
non-experimental voucher cases.
• 	Wave 2 with the above design
• 	Wave 3 with the above design
• 	Consulted with SRC IRB liaison and UM IRB administrative staff regarding contingencies issues by UM IRB.
Completed preparation of responses from UM IRB contingencies. The contingency response is ready to submit.
• 	Began preparation of materials for next UM IRB amendment submission
o 	Compilation of changes to adult and child questionnaires
o 	Revisions to recruitment protocol and documents for pretest corresponding to PIs decision in late-February to
change the pretest sample design to eliminate door-to-door screening.
☐ 	Created recruitment flyer
☐ 	Created recruitment telephone script
Task 2: Sampling
• 	No activity
Task 3: Questionnaire and Protocol Development/Pretest
• 	Continued revisions to project manual chapter to incorporate changes due to design of blood pressure monitor
and cuffs.
• 	Completed development of project manual chapter about the adult questionnaire.
• 	Drafted powerpoint slides for training on adult questionnaire.
Task 4: CAI Programming
• 	Continued iterative testing and programming for bug fixes and errors on screener, adult, and child instruments.
• 	Conducted iterative testing and programming for bug fixes and errors on household observations.
• 	Completed specifications for child time diary data entry application.
• 	Revised format of child time diary to improve usability and facilitate scanning.
Task 5: Systems Programming
o 	Worked with technicians at two companies to triage non-working noise meters (received on March 28), determine
basic functionality and use of new meters.
o 	Tested noise meters to establish comparability of data with Windows 7 version of the noise meter.
Task 6: Recruitment & Hiring
Task 7: Training
Task 8: Main Data Collection
Task 9: Post Collection Processing
Task 10: Weighting
Task 11: Final Data Deliverables

Cost information: H&C subcontract funded by the MacArthur Foundation authorized through 6/30/2014.

Total survey funding available:	$	625,476
Total Expended in March 2014:	$	83,648
Total Expended to Date	$	679,537
Variance:	$	(54,061) (overrun)

Cost explanation:
The cost estimated above reflects total survey funding available and awarded to Michigan and current expenditures
charged through the end of March 2014. March expense includes the cost of pretest supplies that were ordered in
January and February, and biweekly payroll cost from the last two weeks of February. Low level project work
continued in April.

Special Issues

Areas of risk:
Schedule. The schedule will be revisited when contracts for continuing work are finalized. When the project resumes, there will continue to be schedule risk due to regulatory approval (IRB and OMB). Extensive negotiations with the IRB regarding language or contingencies will result in delays to the start of the pretest. In addition, the research team has requested respondent recruitment and other protocol changes that will require additional amendments at both UM and JHU prior to receiving permission to initiate respondent contact. Approvals at Michigan will require coordination with the JHU IRB, which may lead to rounds of negotiation between the two IRBs.

Scheduling a project restart and pretest interviewer training is contingent upon facility availability, trainer availability (including the trainer from University of Toronto), and interviewer availability.

Financial. Work scope and funding for the project is being negotiated. We have been incorporating work scope changes on an ongoing basis. Financial risk exists that work has been done on scope that will eventually be cut. Delays in the project schedule have led to increased project cost. Requested questionnaire consultation and specification work continues to exceed assumptions used to prepare budgets, as does project management cost.

Cost
Apr 28, 2014

Total Cost to Date (Direct + Indirect):	679,537.00
Estimated Cost at Completion (E$AC):	707,658.00
Total Budget:	625,476.00
Variance (Budget minus E$AC):	-54,061.00
Reason For Variance:	Cost explanation:

The cost estimated above reflects total survey funding available and awarded to Michigan and current expenditures charged through the end of March 2014. March expense includes the cost of pretest supplies that were ordered in January and February, and biweekly payroll cost from the last two weeks of February. Low level project work continued in April with the approval of SRO/SRC.

Projections
Apr 28, 2014

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	No projections were entered for March due to the expiration of the sponsored project

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 Current

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)
Funding Agency	
IRB	*HUM#:* *Period Of Approval:*
Project Team	*Project Lead:* Piotr Dworak *Budget Analyst:* William Lokers *Production Manager:* *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 Perio	10/2013 - 04/2014
Security Plan	
Milestone Dates	

*PreProduction Start:*07/01/2013	*Pretest Start:*
Pretest End:	*Recruitment Start:*08/01/2013
*Staffing Completed:*08/28/2013	*GIT Start:*09/17/2013
*SS Train Start:*09/20/2013	*SS Train End:*09/21/2013
*DC Start:*10/01/2013	*DC End:*04/30/2014

Other Project Team Members	Stephanie Chardoul, Piotr Dworak, Tony Romanowski
Other Project Names	

Report Period	Apr, 2014 (TA 2013)	**Project Phase**	Implementing
Risk Level	*Some Concerns*		
Monthly Update	TA reached 80% RR and need 241 more completes to end at goal of 92% - we only have 6 more planned weeks of data collection and the goal will be hard to reach. See Special issues for strategies currently implemented that will help us get close to the goal in time.		

Special Issues   Concerns:

1) Field issues: Cell phone screening - we got more evidence that Rs are screening our calls and that results in extremely low contact rates and

Currently implemented solutions: sent a post-card "sometimes it pays to answer your phone" remind Rs that if they answer a "734" number they may get reimbursed for their time. We are sending text reminders - completion rate on cases reminded via text is 10% (compared to 5% a random chance of agreeing to interviews). TLs doing line reviews and suggesting lines to call and times to call.

About to start: end-game strategies have been approved today (3/27) - up incentive by $30 to $90. A flyer, a text message, and a verbal offer will be made to new TAs, cases that are aging out.

We are also considering switching the outgoing phone number. This was done once already and did improve contact rates.

2) budget over-run: Interviewing time is coming under projections - most of the over-run was incurred during application programming (switch from ST to SMS and sorting out the DRI issues).

Cost
Mar 31, 2014

Total Cost to Date (Direct + Indirect):	519,325.00
Estimated Cost at Completion (E$AC):	711,170.00
Total Budget:	686,749.00
Variance (Budget minus E$AC):	-24,425.00
Reason For Variance:	

Projections
Mar 31, 2014

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

Measures

	Units Complete	RR	HPI
Current Goal:	1702	84%	4.93
Goal at Completion:	1859	92%	5.00
Current actual:	1607	79%	5.05
Estimate at Complete:	1785	88%	5.35
Variance:	-57	4%	+0.35

Other Measures

Project Name	Transitions from Preschool through High School: Family, Schools and Neighborhoods (CDS IV)
Project Mode	Primary: Telephone Secondary: Face to Face Total of Modes: 3
Project Type	Sponsored Projects **Project Status** Current

Budget   ***Direct Budget:***   0.00   ***InDirect Budget:***   0.00   ***Total Budget:***   0.00

Principal Investigator/Client
Narayan Sastry (University of Michigan Survey Research Center)
Kate McGonagle (University of Michigan Survey Research Center)

Funding Agency   National Institute of Child Health and Human Development
IRB   ***HUM#:***   HUM00075944   ***Period Of Approval:***
Project Team   ***Project Lead:***   Jennifer C Arrieta
                      Budget Analyst: William Lokers
                      Production Manager: Dianne G Casey
                      Senior Project Advisor: Stephanie A Chardoul
                      Production Manager: Shonda R Kruger-Ndiaye
                      Production Manager: Maryam N Buageila

Description:
The Child Development Study is part of the Panel Study of Income Dynamics (PSID) suite. The goal of the CDS is to gather comprehensive and nationally representative, longitudinal data about children and their families to study how social, economic, and other factors affect children's and adolescents' development. The original CDS followed a cohort of children in PSID families who were 0–12 years of age in 1997 through three waves of data collection and focused on understanding the socio-demographic, psychological, and economic aspects of childhood in an on-going nationally-representative longitudinal study of families. In 2014, all of the children in the original cohort have reached adulthood, and a new generation of children has replaced them in PSID families. The goal is to collect information in 2014 on all children aged 0–17 years in this new generation, shifting the orientation from a cohort study to one that obtains information on the childhood experiences of all children in PSID families, who will become primary respondents in the Core PSID when they form their own economically-independent households. These new data will support studies of health, development, and well-being in childhood; the relationship between children's characteristics and contemporaneous family decision-making and behavior; and the effects of childhood factors on subsequent social, demographic, economic, and health outcomes over the entire life course for these individuals as they are followed into the future as part of PSID. The sample will consist of approximately 6,400 children aged 0-17 and 3,500 primary caregivers.

Data collection will be conducted in a variety of modes (FTF, TEL, MAIL) and will include the following:
•   A cover screen interview with an adult member of the household, preferably the expected primary caregiver, other caregiver, or the PSID 2013 respondent, to identify the actual primary caregiver and children;
•   A telephone interview with the child's primary caregiver;
•   A telephone interview with each child in the family unit ages 12- 17;
•   An interactive voice response (IVR) administration of sensitive questions with each child ages 12-17;
•   An in-person interview with a sub-set of children ages 8-11;
•   Woodcock Johnson assessments with a sub-set of primary caregivers and children ages 3-17;
•   A weekday and weekend time diary about the primary caregiver's activities;
•   A weekday and a weekend time diary about each child's activities;
•   Height and weight measurements for each child ages 3-17;
•   Height, weight, and waist circumference measurements for the primary caregiver;
•   Collection of a saliva sample from the primary caregiver and from children ages 5-17;
•   School records and birth records linkage consent forms for the primary caregiver and each child ages 0-17; and
•   Neighborhood and in-home interviewer observations with a sub-set of households.

Project Period   03/2014 - 08/2015   **Proposal No:**
Data Collection Perio   10/2014 - 04/2014
Security Plan   Yes
Milestone Dates

PreProduction Start:03/01/2014	***Pretest Start:***07/22/2014
Pretest End:08/09/2014	***Recruitment Start:***06/01/2014
Staffing Completed:09/08/2014	***GIT Start:***10/04/2014
SS Train Start:10/06/2014	***SS Train End:***10/11/2014
DC Start:10/15/2014	***DC End:***04/15/2015

Other Project Team Members	Jeff Smith/Louis Daher - Tech Team Leads Sara Freeland - Training Coordinator Youhong Liu/Peter Sparks- CAI Programmers Marsha Skoman/Holly Ackerman - Sample Management System Programmers Lingling Zhang/Brad Goodwin - Data Managers Genise Pattullo - Help Desk Supervisor Winter Freeman - Project Assistant Ryan Yoder - Instrument testing and specs Jay Lin - Instrument testing
Other Project Names	New Age Child Development Study CDS 2014

Report Period	Apr, 2014 (CDS IV)	**Project Phase**	Initiation

Risk Level   *Some Concerns*

Monthly Update

During the month of April, the project manager and survey director joined weekly instrument design meetings with the PI and PSID staff and have been able to assist discussions regarding operationalizing suggested protocols, cost implications, etc. Technical design discussions have continued with both SRO and PSID technical team members assuming the full design slated for pretest. Sample Management specifications were started. Additional efforts included preparating for cognitive interviews, training team meetings started, and work on pretest staffing. An RFQ has been submitted to procurement to obtain bids from companies that offer and host interactive voice response. Additional resources were added to the team to assist study staff in questionnaire specifications and instrument testing.

An original budget assuming telephone/mail design consisting of $3,843,165 direct and $5,976,123 total was presented to the PI team in October 2013. The PI team is exploring FTF options with a sub-set of the sample. They are interested in incorporating additional assessments during an in-person interview, which would include Woodcock Johnson assessments, height, weight, waist circumference, interviews with 8-11 year old children, and in home and neighborhood observations in addition to the telephone interviews, saliva samples, and time diaries. Additionally, they requested that the rebudget include the use of Interactive Voice Response (IVR) technology for the administration of sensitive questions to teenaged respondents. In February, SRO received explicit permission in email from Narayan Sastry, PI to conduct pre-production activities as planned with the full design in mind for pretest as they continue to work on budgeting and final design decisions. SRO followed up with the PI expressing concern about the timeline for the budget and suggesting options for moving forward without the detailed sample design plan. SRO has received response to the majority of questions to move forward with budgets assuming 40% FTF maximum but are still awaiting one piece of information (as of 4/22/14).

Special Issues

•The PIs indicated they will likely request multiple budget iterations as they want to determine how much FTF effort could be made during CDS 2014 within their current budget and without reducing the sample size.
•The timeline is tight for FTF budget, revisions, and final design decisions in order to implement for an October data collection period.
•Questionnaire development is behind schedule although every effort is being made to ensure deliverables are met to maintain current schedule.
•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.

Cost
Mar 31, 2014

Total Cost to Date (Direct + Indirect):	46,176.57
Estimated Cost at Completion (E$AC):	0.00
Total Budget:	0.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	Final design and budget still to be determined.

Projections
Mar 31, 2014

Dollars Projected For Month:	31,242.66
Actual Dollars Used:	22,558.64
Variance (Projected minus Actual):	8,684.02
Reason For Variance:	164 more hours were projected across the team than were charged/needed for March. These hours will be pushed forward.

Measures

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

Other Measures

Project Name	World Health Organization Model Disability Survey (WHO-MDS)
Project Mode	Primary: Cognitive IW
Project Type	Sponsored Projects

			Project Status	Current
Budget	***Direct Budget:*** 120,509.00	***InDirect Budget:*** 0.00	***Total Budget:***	120,509.00

Principal Investigator/Client	Ting Yan (ISR, SMP) Dr. Somnath Chatterji (World Health Organization) Alarcos Cieza (University of Southampton)
Funding Agency	

IRB	***HUM#:***		***Period Of Approval:***
Project Team	***Project Lead:***	Jennifer M Kelley	
	Budget Analyst:	William Lokers	
	Production Manager:		
	Senior Project Advisor:	Beth-Ellen Pennell	
	Production Manager:		
	Production Manager:		

Description:	The purpose of this study is to develop a questionnaire for the World Health Organization Model Disability Survey. Specifically, SRC will develop and conduct a virtual train-the-trainer session for cognitive interviewing in three countries - China, Ghana, and Nepal. Update: A new work scope was added to the project to conduct 60 cognitive interviews locally to test revisions that were implemented after the first round of English cognitive interviews and SRC's expert review.

Project Period	09/2013 - 06/2014	
Data Collection Perio		**Proposal No:**
Security Plan		

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	Lisa Carn, Production Manager for local cognitive interviews
Other Project Names	

Report Period	Apr, 2014 (WHO-MDS)	**Project Phase**	Planning
Risk Level	*On Track*		
Monthly Update	NCHS and UMICH will do parallel testing and then combine reports for an executive summary that will be distributed to the organizations working on the MDS. Cognitive interviewing is slated to begin at the end of April/beginning of May, dependent on available resources. Depending on results of cognitive testing, future testing would take place in Nepal and/or China.		
Special Issues			

Cost **Apr 15, 2014**	***Total Cost to Date (Direct + Indirect):***	63,786.99
	Estimated Cost at Completion (E$AC):	103,329.94
	Total Budget:	120,509.00
	Variance (Budget minus E$AC):	17,179.06
	Reason For Variance:	
Projections **Apr 15, 2014**	***Dollars Projected For Month:***	0.00
	Actual Dollars Used:	0.00
	Variance (Projected minus Actual):	0.00
	Reason For Variance:	

Measures

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

Other Measures