# *Survey Research Operations*

## *Monthly Project Report*

### *Sponsored Projects*

## *September 2013*

## Sponsored Projects

*(Army STARRS) Army Study to Assess Risk and Resilience in Servicemembers*
*(CogEcon2013 Web/Mail Study) Cognitive Economics 2013*
*(DUST II 2013) Health and Daily Life*
*(H&C) The Role of Housing in Children's Healthy Development*
*(HealthDisp) Health Disparities*
*(HRS CAMS13) HRS Consumption and Activity Study*
*(HRS Internet 2013) HRS Internet 2013*
*(HRS Screening Initiative) HRS Screening Initiative*
*(HRSVA) HRS-VA Data linkage Project - HRS Veterans Administration Consent Collection Project*
*(IMDU) Intensive Measurement of Drug Use during Transition to Adulthood*
*(iPhone) Responding to Surveys on Mobile Multimodal Devices*
*(LMT MS) Math Solutions*
*(MCEE) Michigan Council on Educator Effectiveness*
*(MDRC) MDRC - Reading Partners Program Evaluation Project*
*(MRRS III) Effects of Recession and Economic Stimulus in Southeast Michigan Wave III*
*(MTF NR 2013) MTF Non-response 2013*
*(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)*
*(SCA 2013) Surveys of Consumer Attitudes*
*(SCIP) Sustainability Cultural Indicators Project*
*(SHOS-B) Army STARRS SHOS-B*
*(TA 2013) Transition to Adulthood (2013)*
*(Transcript Study) Impact of the Michigan Merit Curriculum & Michigan Promise Scholarship on Studen*
*(UMCOP Alum Study) UM College of Pharmacy Alumni Study*

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|---|---|
| **Project Name** | Army STARRS SHOS-B (SHOS-B) |
| **Project Mode** | Primary: Telephone  Secondary: Web  Total of Modes: 2 |
| **Project Type** | Sponsored Projects  **Project Status** Current |
| **Budget** | ***Direct Budget:*** 918,952.00  ***InDirect Budget:*** 238,927.52  ***Total Budget:*** 1,157,879.52 |
| **Principal Investigator/Client** | |

**Project Team**

| | |
|---|---|
| ***Project Lead:*** | Nancy J Gebler |
| ***Budget Analyst:*** | William Lokers |
| ***Production Manager:*** | Lisa J Carn |
| ***Senior Project Advisor:*** | |
| ***Production Manager:*** | Margaret Lee Hudson |
| ***Production Manager:*** | |

**Description:**

SHOS-B stands for Solder Health Outcomes Study B. The primary research aim addressed by SHOS-B is to find the risk and protective factors for suicide death among Army Soldiers. SHOS-B will assess potential risk and protective factors from multiple domains including: the presence and accumulation of mental disorders, receipt of psychological treatment, developmental history and medical family history, the experience of specific military or general life stressors, and recent experiences/state of mind prior to death.

The Soldier Health Outcomes Study B (SHOS-B) represents the psychological autopsy component of the Army STARRS project and broadly aims to identify risk and protective factors for suicide among Army Soldiers. SHOS-B is the study of those Soldiers who have died by suicide while on active duty in the Army. Soldiers who are regular Army, as well as Soldiers who are Reserve and National Guard are included in the study.

A “psychological autopsy” is a term for a detailed and broad investigation of a person and the circumstances surrounding that person’s death. It is frequently used if the death was from suicide. The investigators attempt to reconstruct what the person thought, felt, and did before death, based on information gathered from personal documents, police reports, medical and coroner’s records, and interviews with families, friends and others who had contact with the person before death.

There are many advantages to using psychological autopsy. These studies aim to reconstruct an individual’s psychological makeup (e.g., thoughts, feelings, behaviors, intentions, motivations, life circumstances), identify risk factors for death, and understand the mode and details of the suicidal behavior. Psychological autopsy studies offer a unique opportunity to gather information on a number of areas linked to suicide that are not generally accessible to epidemiological studies.

In addition to the strengths of psychological autopsy studies in general, SHOS-B is unique relative to other Army STARRS components as it is the only component of the study to obtain new data on risk and protective factors for suicide among Soldiers who have recently died by suicide. SHOS-A will collect information on risk and protective factors from recent suicide attempters (a group known to differ somewhat from those who actually die by suicide), and the aggregate database component will examine information about risk and protective factors available among Army records.

The SHOS-B study seeks to recruit and interview two Informants (a next of kin and an Army Supervisor) for each Soldier who has died. The research team will also examine administrative data for the Soldiers, in order to better understand the circumstances of that Soldier’s time in the Army, and subsequent death.

SHOS-B is a case/control study. For every Case Soldier (a Soldier who has died), we will recruit two Control Soldiers. These will be Soldiers who may have similar backgrounds and/or experiences but have not died. SHOS-B will interview two Informants (next of kin and Army Supervisor) for each Control Soldier. The inclusion of this control group allows for the possibility of assessing which risk factors are most linked with suicide. In other words, we will compare the two groups of Soldiers to determine what leads some Soldiers to be more resilient to experiences common to Soldiers, and what decreases resilience in others.

The SHOS-B project is necessary to provide previously unavailable information about a wide range of factors that may be useful in better understanding and predicting suicide death among Army Soldiers. Ultimately, we hope that this information will help to prevent unnecessary deaths among Soldiers.

| | | | |
|---|---|---|---|
| **Project Period** | 01/2010 - 06/2014 | **Proposal No:** | |
| **Data Collection** | 03/2012 - 12/2013 | | |

**Milestone Dates**

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

**Other Project Team Members**

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**Report Period** Sep, 2013 (SHOS-B) **Project Phase** Implementing

***Risk Level*** *Not Rated*

**Monthly Update** Update included in Army STARRS report.

**Special Issues**

**Cost**
**Sep 30, 2013**

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|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 0.00 |
| ***Estimated Cost at Completion*** | 0.00 |
| ***Total Budget:*** | 1,157,879.52 |
| ***Variance (Budget minus E$AC):*** | 0.00 |

**Measures**

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

**Other Measures**

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**Project Name** Army Study to Assess Risk and Resilience in Servicemembers (Army STARRS)

**Project Mode** Primary: Class SAQ Secondary: Mixed Total of Modes: 2

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

**Budget** ***Direct Budget:*** 24,375,004.00 ***InDirect Budget:*** 6,332,159.00 ***Total Budget:*** 30,707,164.00

**Principal Investigator/Client** Steve Heeringa (University of Michigan)

**Project Team**

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

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

**Project Period** 07/2009 - 06/2014 **Proposal No:** 09-0046

**Data Collection** 01/2011 - 12/2013

**Milestone Dates**

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

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

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**Report Period** Sep, 2013 (Army STARRS) **Project Phase** Implementing

***Risk Level*** *Not Rated*

**Monthly Update** Update info given directly to Admin.

**Special Issues**

**Cost**
**Sep 30, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 0.00 |
| ***Estimated Cost at Completion*** | 0.00 |
| ***Total Budget:*** | 30,707,164.00 |
| ***Variance (Budget minus E$AC):*** | 0.00 |

**Measures**

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

**Other Measures**

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**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)

**Project Team**

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|---|---|
| ***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** 09/2013 - 01/2014

**Milestone Dates**

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

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

**Report Period** Sep, 2013 (CogEcon2013 **Project Phase** Planning

***Risk Level*** *Not Rated*

**Monthly Update** During August a Project Review meeting was held for the start of this project. In August and September SRO team worked with client on testing of instrument, preparing for the mail out for paper questionnaires and development of the sample management system. As of mid September the client had still not finalized the questionnaire so negotiations to delay the launch (originally planned for September 19th) continued. This is a very tight budget so client requests for help with web programming by Hueichun need to be carefully monitored (budget was established with client doing the web programming and Hueichun assisting with "slider" and more difficult technical aspects).

**Special Issues**

**Cost**
**Aug 31, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 55,586.51 |
| ***Estimated Cost at Completion*** | 134,215.50 |
| ***Total Budget:*** | 134,797.00 |
| ***Variance (Budget minus E$AC):*** | 580.50 |

**Measures**

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

**Other Measures**

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

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

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

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

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

**Project Team**

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

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

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

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

**Milestone Dates**

| | |
|---|---|
| ***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

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**Report Period** Sep, 2013 (MRRS III) **Project Phase** Implementing

***Risk Level*** *Some Concerns*

**Monthly Update**

During the first fourteen weeks of data collection (6/17-9/21), 697 interviews were completed (17 interviews below goal). The $100 initial close-out letters have led to an increase in completed interviews reducing the previous gap between projected and actual number of interviews. The average interview length was 73.15 minutes (5.15 minutes above budgeted). The cumulative HPI (4.62) is higher than was originally projected for this point in data collection (4.20) and higher than the budgeted HPI (4.34). The higher percent of phone interviews (76%) than budgeted (61%) has helped keep the HPI lower. Thirty percent of the total sample had been placed in tracking by the end of week 7 (note: In wave 2, 25% of the sample had been placed in tracking during data collection) of which the field staff has located 91%. Forty-seven respondents (6% of the total sample) have expressed resistance at least once since the start of data collection, of which, twenty (43%) have completed the interview.

**Special Issues**

Concerns for the study include:
-Mid-April, the client requested SRO to look for ways to save $10,000 to $20,000 direct;
-Iw length is longer than projected and HPI is higher than budgeted which could lead to cost over-runs. The August cost report assumes a 4.80 overall HPI (budgeted was 4.34) which still projects a small under-run;
-Managing multiple funding sources;
-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;
-IRB is requiring callbacks to 324 respondents who completed their telephone interview prior to receiving the confidentiality and consent terms document. An ORIO and an ammendment were reviewed/approved in September 2013. Ballpark estimate for this work is $13,000-$15,000;
- During review of the second data set delivered to the client, the client identified problems in the instrument which led to cases wither being skipped over questions or asked more questions that were not necessary. In investigating, these were a combination of specification errors and/or programming errors that were not identified during testing. New datamodels have been sent to the field with the fixes. The client is requesting callbacks on two questions that were skipped for 432 respondents. Since 221 of the respondents needing question callback overlap with the consent callback effort, a ballpark estimate will be created for to combine both efforts. An ORIO and ammendment are being drafted for this effort.

**Cost**
**Aug 30, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 248,686.36 |
| ***Estimated Cost at Completion*** | 619,833.88 |
| ***Total Budget:*** | 628,930.00 |
| ***Variance (Budget minus E$AC):*** | 9,096.12 |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| ***Current Goal:*** | 714 | 84% | 4.20 |
| ***Goal at Completion:*** | 752 | 90% | 4.34 |
| ***Current actual:*** | 697 | 83% | 4.62 |
| ***Estimate at Complete:*** | | | |
| ***Variance:*** | | | |

**Other Measures**

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

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

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

| | | | | | |
|---|---|---|---|---|---|
| **Budget** | ***Direct Budget:*** 744,423.00 | ***InDirect Budget:*** | 459,804.00 | ***Total Budget:*** | 1,204,227.00 |

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

**Project Team**

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

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

**Project Period** 01/2013 - 04/2017 **Proposal No:**

**Data Collection** 06/2013 - 01/2014

**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:***01/31/2013 |

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

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**Report Period** Sep, 2013 (DUST II 2013) **Project Phase** Implementing

***Risk Level*** *Some Concerns*

**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 are that the 80% response rate will be difficult to attain. We are preparing to contact some R's by email in an effort to reach some who have been particularly hard to contact. One barrier we have to getting a good response rate is that the IRB approval does not allow for Refusal Conversion techniques. It only allow us to send letters to the "resistant" and follow-up with a phone call to see if they will now be willing. Rejection at that point will have to be coded a Final Refusal.

**Special Issues** There are three measures of project progress, each specified in a project goal chart, one for the CS, one for TD1's and the other for TD2's. While we are ahead of schedule with CS completions, we are somewhat behind with each of the TD types. However, keep in mind that the goal chart was created to address the PI's request to complete DC in December, rather than the scheduled late January to early February. While the goal chart "lags" for the TD's, current projections are that DC will be completed in the Jan/Feb time frame, as originally planned. The client is aware of this. Please note that while the PI requested an earlier completion date for DC, this was done only in the form of "it would be good if we could be done in December", she did not demand an actual official change in its end date, and nor was one provided.

**Cost**
**Sep 20, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 581,099.89 |
| ***Estimated Cost at Completion*** | 1,204,227.00 |
| ***Total Budget:*** | 1,204,227.00 |
| ***Variance (Budget minus E$AC):*** | 0.00 |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| ***Current Goal:*** | 860 | 56.7% | 8.87 |
| ***Goal at Completion:*** | 1515 | 80% | 8.99 |
| ***Current actual:*** | 622 | 41.1% | 6.69 |
| ***Estimate at Complete:*** | 1515 | 80% | 8.99 |
| ***Variance:*** | 0 | 0.00% | 0 |

**Other Measures**

We are in the midst of a projection of the likely response rate based upon the current status of the sample and applying likelihood to complete estimates to the outstanding cases. We will be sharing that projection with our SPA very soon.

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**Project Name** Health Disparities (HealthDisp)

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

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

**Budget** ***Direct Budget:*** 8,180.00 ***InDirect Budget:*** 4,265.00 ***Total Budget:*** 12,466.00

**Principal Investigator/Client** Dr. James Jackson (Research Center for Group Dynamics - ISR)

**Project Team**

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

**Description:**

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

**Project Period Data Collection** 01/2009 - 06/2013 **Proposal No:** 09-0007

**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** Marta Murray Close, Paul Schulz

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**Report Period** Sep, 2013 (HealthDisp) **Project Phase** Closing

***Risk Level*** *On Track*

**Monthly Update**

The project staff tested the latest version of the instrument and has given a list of items they want changed/updated/fixed. Those changes will be made. The project staff asked the SPA in a meeting about the follow-up instruments (which they had not provided) and a budget for a new project with a similar instrument.

Most of the changes/updates/fixes have been made. The proejct staff will be given a new version to test in March. Paul Schulz will be coming on to finsih any fixes after this and will work on the subsequent waves of the instrument. A meeting is scheduled with the project staff, Andrew and Paul to transition the work of finalizing the main instrument and begin work on the follow-up instruments.

Andrew and Paul met with the project staff about the new changes and fixes that are still needed and the next follow-up survey that needs to be programmed. Paul is taking over the programming moving forward. Paul will make the changes and give a testing verison to the project staff. Once the initial instrument is finalized the work on the follow-up instrument will begin. The project staff has been learning about the instrument as they interview participants using paper surveys which have prompted changes in the programming of things they had not forseen. The follow-up instrument is largely based on the main instrument. Once everything is working there, that instrument will be used as the basis for the follow-up instruments.

May '12
Paul continues to provide testing version and makes corrections and additions as necesarry as they test. The main instrument is close to being ready. After that Paul will begin programming the follow-up instruments (which are largely subsets of the main instrument. Stephanie C. has been working with the client on all of the scope changes and getting more funds from them.

June '12
Paul continues to provide testing version and makes corrections and additions as necesarry as they test. The main instrument is close to being ready. After that Paul will begin programming the follow-up instruments (which are largely subsets of the main instrument. Stephanie C. has been working with the client on all of the scope changes and getting more funds from them. They have agreed to provide more funds, but they are awaiting all of the funds from SPH.

July '12
Paul has most of the instrument programmed. There are a few remaining items that need to be fixed. Once those items work, Paul will begin working on the follow-up instruments. Stephanie C. has been working with the client on all of the scope changes and getting more funds from them. They have agreed to provide more funds, but they are awaiting all of the funds from SPH.

August '12
Paul has most of the instrument programmed. The research team continues to make changes to the instrument. Once those items have been implemented, Paul will begin working on the follow-up instruments. Stephanie C. has been working with the client on all of the scope changes and getting more funds from them. They have agreed to provide more funds (cover our overrun and provide additional money), but they are awaiting all of the funds from SPH.

September '12
Paul has most of the instrument programmed. The research team continues to make changes to the instrument. Once those items have been implemented, Paul will begin working on the follow-up instruments. Stephanie C. has been working with the client on all of the scope changes and getting more funds from them. They have agreed to provide more funds (cover our overrun and provide additional money), but they are awaiting all of the funds from SPH.

October '12
Paul has most of the instrument programmed. The research team continues to make changes to the instrument. Once those items have been implemented, Paul will begin working on the follow-up instruments. Stephanie C. has been working with the client on all of the scope changes and getting more funds from them. They have agreed to provide more funds (cover our overrun and provide additional money), but they are awaiting all of the funds from SPH. Andrew spoke with the research team and they have provided SRO with access to an account on the RCGD side for Paul to charge to. We will be able to move the overrun to their accounts once they have their year 3 funding from SPH.

November/December '12
Paul made the last few updates to the instrument. The project staff tested and signed off on the production instrument. Paul worked with them on the best way to handle loading the sample and is available to answer questions. He has begun working on the follow-up instruments now that they have signed off on the base instrument.

January '13
Paul has been working on the Wave 2 follow-up instrument. That is close to being finished with a few changes expected after further testing has occurred. After that he will program the next two waves which are based on the Wave 2 instrument with only minor wording changes expected. All time is being charged to a project staff account. I spoke with the financial person on their side about the overrun. They will roll the SRO balance up into the RCGD balance thereby absorbing the overdraft.

February '13
Paul provided the Wave 2 instrument and has been working on the Wave 3 instruments. The client has come back with changes to the Wave 1 instrument they would like made. Time continues to be charged directly to project accounts. We have been in contact about absorbing the SRO overrun.

March '13
The Wave 3 instrument has been provided for testing. A bug in the medication grid is being fixed. Next month work on the Wave 4 instrument should begin. Time continues to be charged directly to project accounts. We have been in contact with the project staff about them absorbing the SRO overrun.

April '13
The bug in the medication grid was fixed and work on the Wave 4 instrument has begun. Time continues to be charged directly to project accounts. We have been in contact with the project staff about them absorbing the SRO overrun.

May '13
Work in May was focused on the Wave 4 instrument. Time continues to be charged directly to project accounts. We have been in contact with the project staff about them absorbing the SRO overrun.

June '13
Paul finished the Wave 4 instrument and delivered for testing. Work on the Wave 5 instrument will occur in July and the Wave 6 (the last instrument) instrument in August. Time continues to be charged directly to project accounts. We have been in contact with the project staff about them absorbing the SRO overrun.

July '13
Paul finished the Wave 5 instrument in July and will work on the Wave 6 instrument in August. Time continues to be charged directly to project accounts. We have been in contact with the project staff about them absorbing the SRO overrun.

August/September '13
Paul finished the Wave 6 instrument in August. Time continues to be charged directly to project accounts. We have been in contact with the project staff about them absorbing the SRO overrun. Project staff contacted Paul about programming the instrument for the Diabetes survey (which has overlap with the instruments he has been programming). He has started and continues to charge the project staff account.

**Special Issues**

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

**Cost**
**Aug 31, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 14,399.95 |
| ***Estimated Cost at Completion*** | 14,399.95 |
| ***Total Budget:*** | 12,466.00 |
| ***Variance (Budget minus E$AC):*** | -1,933.95 |

**Measures**

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

**Other Measures**

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**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)

**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** 10/2013 - 03/2014

**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:*** | |

**Important Project Dates**

| | | | |
|---|---|---|---|
| ***Initial Mailing:*** | 10/16/2013 | ***1st Follow Up Mailing:*** | 11/13/2013 |
| ***2nd Follow Up (postcard):*** | 11/26/2013 | ***3rd Follow Up Mailing:*** | 12/11/2013 |

**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)

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**Report Period** Sep, 2013 (HRS CAMS13) **Project Phase** Planning

***Risk Level*** *On Track*

**Monthly Update**
September activities included questionnaire and respondent materials development, translation and IRB submission; resource allocation; WebLog programming; sample review. Budget documents are being reviewed, but funding was allocated with HRS 6 year funding so short codes are active

**Special Issues**
Unexpected requirement of IRB full board review has set us behind our desired launch date, although a request for expedition is being considered.

**Cost**
**Sep 19, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 6,870.84 |
| ***Estimated Cost at Completion*** | 450,000.00 |
| ***Total Budget:*** | 458,267.00 |
| ***Variance (Budget minus E$AC):*** | 8,276.00 |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| ***Current Goal:*** | | | |
| ***Goal at Completion:*** | 6412 | 73% | |
| ***Current actual:*** | | | |
| ***Estimate at Complete:*** | 6412 | 73% | |
| ***Variance:*** | | | |

**Other Measures**

---

**Project Name** HRS Internet 2013 (HRS Internet 2013)

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

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

**Budget** ***Direct Budget:*** 263,974.00 ***InDirect Budget:*** 137,019.00 ***Total Budget:*** 400,933.00

**Principal Investigator/Client**
David Weir (SRC)
Mary Beth Ofstedal (SRC)
Kenneth Langa (SRC)

**Project Team**

| | |
|---|---|
| ***Project Lead:*** | Maryam N Buageila |
| ***Budget Analyst:*** | Richard Warren Krause |
| ***Production Manager:*** | |
| ***Senior Project Advisor:*** | Mary P Maher |
| ***Production Manager:*** | James Koopman |
| ***Production Manager:*** | |

**Description:** Survey Research Operations will host and manage the HRS 2013 Internet Project. The Health and Retirement Study Internet Project has previously been conducted in 2003, 2006, 2007, 2009 and 2011. The current study will include all those previously invited to participate in the HRS Internet projects as well as a random sample of the additional core HRS sample members who reported using the Internet during their HRS 2012 interview. HRS staff will develop the questionnaire and program it in Illume. The programmed instrument and sample information including unique IDs for the preload will be provided to SRO by the Principal Investigator and his staff. SRO will host and manage the Illume survey and produce reports outlining the progress of the project.
This project will utilize a sample of approximately 7,761 participants including previous Internet sample and random selection of new respondents who self select by indicating that they use the internet. The sample will be released in two replicates; the first being a 200 case pilot test and the second incorporating the remaining sample. SRO will send invitations and up to three reminders via mail and will utilize a specific help desk to address respondent concerns by phone and email.

**Project Period** 03/2013 - 08/2013 **Proposal No:** 13-PAF05070

**Data Collection** 04/2013 - 07/2013

**Milestone Dates**

| | |
|---|---|
| ***PreProduction Start:*** 03/10/2013 | ***Pretest Start:*** |
| ***Pretest End:*** | ***Recruitment Start:*** |
| ***Staffing Completed:*** | ***GIT Start:*** |
| ***SS Train Start:*** | ***SS Train End:*** |
| ***DC Start:*** 04/22/2013 | ***DC End:*** |

**Important Project Dates**

| | |
|---|---|
| ***Initial Invitation Pilot:*** 04/22/2013 | ***Initial Invitation Production:*** 05/15/2013 |
| ***1st follow up Pilot:*** 05/06/2013 | ***1st follow up Production:*** 05/29/2013 |
| ***2nd follow up Pilot:*** 05/20/2013 | ***2nd Follow Up Production:*** 06/12/2013 |
| ***3rd follow up Pilot:*** 06/03/2013 | ***3rd Follow Up Production:*** 06/26/2013 |
| ***Survey close:*** 08/26/2013 | |

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

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**Report Period** Sep, 2013 (HRS Internet 2013) **Project Phase** Closing

***Risk Level*** *On Track*

**Monthly Update** The Internet survey was closed on 08/26/2013. All work production work has stopped on the project. A debriefing was held with SRO and SRC programming staff reviewing problems encountered, lessons learned, and strategies for next wave. The response rate almost reached our minimum expectation of 75%. Staff hours have risen slightly above budget, while nonsalary total remained low enough to absorb this without an overrun.

**Special Issues**

**Cost**
**Sep 25, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 387,550.36 |
| ***Estimated Cost at Completion*** | 397,220.17 |
| ***Total Budget:*** | 400,933.00 |
| ***Variance (Budget minus E$AC):*** | 8,772.83 |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| ***Current Goal:*** | 5650 | 75% | |
| ***Goal at Completion:*** | 5700 | 75% | |
| ***Current actual:*** | 5649 | 74.6% | |
| ***Estimate at Complete:*** | 5675 | 74.6% | |
| ***Variance:*** | 25 | .4% | |

**Other Measures**

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

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

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

**Budget** ***Direct Budget:*** 400,000.00 ***InDirect Budget:*** 0.00 ***Total Budget:*** 400,000.00

| | |
|---|---|
| **Principal Investigator/Client** | David Weir (UM Survey Research Center)<br>Mary Beth Ofstedahl (UM Survey Research Center) |

**Project Team**

| | |
|---|---|
| ***Project Lead:*** | Frost Alexander Hubbard |
| ***Budget Analyst:*** | Richard Warren Krause |
| ***Production Manager:*** | Theresa Camelo |
| ***Senior Project Advisor:*** | Mary P Maher |
| ***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** | 08/2013 - 10/2013 | | |

**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:*** | 10/13/2013 |

**Other Project Team Members** Frost Hubbard, Heidi Guyer, Wen Chang, Nicole Kirgis, Piotr Dworak, Richard Valliant, Sunghee Lee, Theresa Camelo

| | | | |
|---|---|---|---|
| **Report Period** | Sep, 2013 (HRS Screening | **Project Phase** | Implementing |
| ***Risk Level*** | *On Track* | | |

**Monthly Update**

September updates by task:

2013 Screening Experiment
The HPS, due to flooding in Denver and noncontact and nonresponse issues in all three of the affluent, high density white segments, is higher than expected. Because of this, we have decided to cut the data collection period down from 10 weeks to 7 weeks. We also learned that the overall budget for the HRS 2016 Screening Initiatives project had been reduced (no exact amount given) due to the sequestration.

To combat the high HPS, we began allowing phone screeners in mid-September in the Denver segments as well as the LA Segments using the phone numbers provided by Marketing Systems Group. By 9/25, we did an batch search for more telephone numbers using Accurint. On 10/1, we will send out persuasion letters to all non final cases and shortly follow these letters up with phone calls to all cases where MSG or Accurint could match a telephone number. We will see how this goes and report on it in the October monthly update.

Obtaining DMV lists
On 9/13, we received our first DMV files from the University of Michigan Transportation Research Institute (UMTRI). They were snapshots of data in the same areas in Michigan where NSFG did HH rostering in years 1 and 2 of data collection (9/2011 - 8/2013). Since then, Emily Blaszyck and Frost have been processing the data and sending questions to UMTRI and MDOS to better understanding the data, how it is created and how it is updated. Once we have these person level files aggregated up to the address level, we will compare the DMV data to what NSFG found in their HH rosters. Frost also let the proposal team know that MDOS has allowed any UM researcher to use these data if they are using it to identify HUs that would not be eligible for a particular study. This could help SRC and SRO bring in more business and reduced data collection costs through stratification and oversampling.

Exploration with the Census Bureau
Had 1st conference call with Census Bureau. They are working on preliminary charts. Have a second call with them on 10/4.

Aristotle
No movement on this. Focusing more on getting the DMV data and analyzing it.

Valassis
No analysis done. Unlikely that we will do further analysis because of the lack of HU commercial data from Valassis.

LBB Tracking Experiment:
Nothing new but work will start on this in early December in preparation for the January 2014 HRS newsletter.

**Special Issues**

**Cost**
**Sep 30, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 170.53 |
| ***Estimated Cost at Completion*** | 393,000.00 |
| ***Total Budget:*** | 400,000.00 |
| ***Variance (Budget minus E$AC):*** | 123,937.00 |

**Measures**

| | **Units Complete** | **RR** | **HPI** |
|---|---|---|---|
| ***Current Goal:*** | 1030 | .90 | 1.6 |
| ***Goal at Completion:*** | 1030 | .90 | 1.6 |
| ***Current actual:*** | 657 | .31 | 2.08 |
| ***Estimate at Complete:*** | 893 | .68 | 2.2 |
| ***Variance:*** | -137 | -0.22 | -0.6 |

**Other Measures**

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**Project Name** HRS-VA Data linkage Project - HRS Veterans Administration Consent Collection Project (HRSVA)

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

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

**Budget** ***Direct Budget:*** 93,139.00 ***InDirect Budget:*** 33,531.00 ***Total Budget:*** 126,670.00

**Principal Investigator/Client**
David Weir (SRC)
Ken Langa (SRC)
Mary Beth Ofstedal (SRC)

**Project Team**
***Project Lead:*** Rebecca Gatward
***Budget Analyst:*** Richard Warren Krause

|  |  |
|---|---|
| ***Production Manager:*** | Sara D Freeland |
| ***Senior Project Advisor:*** | Mary P Maher |
| ***Production Manager:*** | |
| ***Production Manager:*** | |

**Description:**

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

**Project Period** 05/2013 - 11/2013 **Proposal No:** 13-0014

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

**Milestone Dates**

|  |  |  |  |
|---|---|---|---|
| ***PreProduction Start:*** | 02/01/2013 | ***Pretest Start:*** | |
| ***Pretest End:*** | | ***Recruitment Start:*** | |
| ***Staffing Completed:*** | | ***GIT Start:*** | |
| ***SS Train Start:*** | | ***SS Train End:*** | |
| ***DC Start:*** | | ***DC End:*** | 07/31/2013 |

**Other Project Team Members**

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

**Report Period** Sep, 2013 (HRSVA) **Project Phase** Implementing

***Risk Level*** *On Track*

**Monthly Update**

Sample: Approximately 3,800 HRS panel members who have self-reported military service in a prior wave of the HRS and eligible to receive Veterans Administration (VA) benefits. These respondents were asked for consent to release their VA health care data to the HRS and to complete a brief mail survey.
Response: To date we have received 1,942 mail questionnaires (51% unadjusted RR) and 1,637 data authorisation forms (44% unadjusted RR) – of these cases, 260 only returned the questionnaire and five respondents chose just to return the data authorisation form.
Data delivery: On Sept. 18th we delivered the first batch of data and scanned images to the HRS project team.
Budget: We are due to review the number of returns we are receiving daily at the end of September - we may ask Apperson to continue logging and scanning until end of November. This will incur an additional cost (not yet specified by Apperson). We have not been invoiced for work completed by Apperson since they completed the most recent mailing at the beginning of August. Thus costs to date do not include all work completed to date by Apperson - although these costs are in the projections.

**Special Issues**

**Cost**
**Aug 31, 2013**

|  |  |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 89,822.02 |
| ***Estimated Cost at Completion*** | 116,472.60 |
| ***Total Budget:*** | 126,670.00 |
| ***Variance (Budget minus E$AC):*** | 10,197.40 |

**Measures**

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

**Other Measures**

**Project Name** Impact of the Michigan Merit Curriculum & Michigan Promise Scholarship on Student Outcomes Project (Transcript Study)

**Project Mode** Primary: Data Processing Secondary: Not Available

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

**Budget** ***Direct Budget:*** 226,610.00 ***InDirect Budget:*** 123,503.00 ***Total Budget:*** 350,113.00

**Principal Investigator/Client**
Barbara Schneider (Michigan State University)
Brian Jacobs (University of Michigan)
Kenneth Frank (Michigan State University)

**Project Team**
***Project Lead:*** Donnalee Ann
***Budget Analyst:*** Christine Evanchek
***Production Manager:***
***Senior Project Advisor:*** Heidi Marie Guyer
***Production Manager:***
***Production Manager:*** Donnalee Ann Grey-Farquharson

**Description:**

SRO will implement technical system and protocol development, and data collection activities for a five-school pilot study. The objectives of the data collection pilot include 1) design instruments, protocols and technical systems for the collection of student transcripts and other course-related materials; 2) estimate the uncertainties and contingencies that would likely ensue for the eventual full scale study (150 schools); and 3) define/propose the work scope and costs for the full scale data collection effort.

Survey Research Operations involvement will cover a period of approximately 7 months, starting in June and continuing through December 2012.

Between June , 2012 and December 31, 2012, a small SRO team will develop and implement the pilot study in five Michigan schools designed to obtain the following:

- Transcripts on high school seniors from the initial time period (2002-2003) to the present.
- End of course assessments (math & science) from the initial time period to the present.
- Syllabi of math & science courses, textbooks, and other materials from the initial time period to the present.
- Teacher rosters of class assignments from the initial time period to the present.
- School surveys.

Post Collection Processing:
- All collected materials will be imported into the sample management system, requiring scanning of paper forms. No additional coding or data entry is included in the SRO budget.
- All data file management and analysis will be performed by the EWB research staff.

Weighting & Estimating:
- There are no sample weights or estimates expected for this pilot project.

Deliverables:
- Data files and documentation of instruments, protocols, and technical systems.
- Proposal for the work scope/budget associated with data collection and coding activities for the full study sample.

**Project Period** 06/2012 - 12/2012 **Proposal No:**
**Data Collection** 08/2012 - 12/2012

**Milestone Dates**

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

**Other Project Team Members** Lesli Scott, Heidi Guyer, Karin Schneider, Donnalee Grey-Farquharson, Katie Huang, Hueichun Peng, Rebecca Loomis

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**Report Period** Sep, 2013 (Transcript Study) **Project Phase** Implementing

***Risk Level*** *Not Rated*

**Monthly Update**

Our current response rate is 70%. We will continue collection activity into December 2013.

We have outreached to the replacement schools. So far there is has been no refusal from schools we have been able to contact. Data has come in Wayne schools.

Catalog information is harder to come by. Schools tend not to have the earlier years 2001-2001 to 2003-2004. Older hard documents are non-existent or hard to find. Electronic catalogs from earlier years are also difficult to find: We find that administrative staff tend to directly edit the catalog file from the previous year instead of say...copying the document before editing for a new year. As a result, electronic catalog files from previous years are hard to come by.

**Special Issues**

**Cost**
**Aug 31, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 288,846.93 |
| ***Estimated Cost at Completion*** | 300,777.03 |
| ***Total Budget:*** | 350,113.00 |
| ***Variance (Budget minus E$AC):*** | 49,335.97 |

**Measures**

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

**Other Measures**

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

**Project Mode** Primary: Web Secondary: Mail

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

**Budget** ***Direct Budget:*** 103,117.00 ***InDirect Budget:*** 57,584.00 ***Total Budget:*** 160,701.00

**Principal Investigator/Client** Megan Patrick (ISR)

**Project Team**

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

**Description:**

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

**Project Period** 02/2012 - 07/2013 **Proposal No:** 10-0050R02

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

**Milestone Dates**

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

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

**Report Period** Sep, 2013 (IMDU) **Project Phase** Closing

***Risk Level*** *On Track*

**Monthly Update** In August the final project review was held and in September the final report was written and archiving activities started. The only additional charges projected to the account will be for the budget analyst to close account in conjuction with Cognitive interview project (on same parent account).

**Special Issues**

**Cost Aug 31, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 144,300.99 |
| ***Estimated Cost at Completion*** | 156,687.81 |
| ***Total Budget:*** | 160,701.00 |
| ***Variance (Budget minus E$AC):*** | 190.04 |

**Measures**

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

**Other Measures**

---

**Project Name** Math Solutions (LMT MS)

**Project Mode** Primary: Class SAQ Secondary: Observation Total of Modes: 3

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

**Budget** ***Direct Budget:*** 1,249,959.00 ***InDirect Budget:*** 681,228.00 ***Total Budget:*** 1,931,187.00

**Principal Investigator/Client**
Heather C. Hill (Harvard University)
Robin Tepper Jacob (University of Michigan)
Douglas Corey (Brigham Young University)

**Project Team**

| | |
|---|---|
| ***Project Lead:*** | Karin Schneider |
| ***Budget Analyst:*** | Mary D Hopper |
| ***Production Manager:*** | Barbara Aghababian-Homburg |
| ***Senior Project Advisor:*** | Lesli Jo Scott |
| ***Production Manager:*** | |
| ***Production Manager:*** | |

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

**Project Period** 05/2009 - 04/2013 **Proposal No:** 10-0018RO2

**Data Collection** 12/2010 - 04/2013

**Milestone Dates**

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

**Important Project Dates**

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

**Other Project Team Members**

---

**Report Period** Sep, 2013 (LMT MS) **Project Phase** Closing

***Risk Level*** *Not Rated*

**Monthly Update** There was only a small amount of wrap up activity through August and September, no further data collection is planned.

**Special Issues**

**Cost**
**Sep 30, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 0.00 |
| ***Estimated Cost at Completion*** | 0.00 |
| ***Total Budget:*** | 1,931,187.00 |
| ***Variance (Budget minus E$AC):*** | 0.00 |

**Measures**

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

**Other Measures**

---

**Project Name** MDRC - Reading Partners Program Evaluation Project (MDRC)

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

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

**Budget** ***Direct Budget:*** 612,409.00 ***InDirect Budget:*** 122,481.00 ***Total Budget:*** 734,890.00

**Principal Investigator/Client** Robin Jacob (EWB)

**Project Team**

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

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

**Project Period** 08/2012 - 09/2013 **Proposal No:**
**Data Collection** 10/2012 - 08/2013

**Milestone Dates**

| | |
|---|---|
| ***PreProduction Start:***07/11/2012 | ***Pretest Start:*** |
| ***Pretest End:*** | ***Recruitment Start:***07/27/2012 |
| ***Staffing Completed:***08/22/2012 | ***GIT Start:*** |
| ***SS Train Start:***09/25/2012 | ***SS Train End:***09/27/2012 |
| ***DC Start:***10/01/2012 | ***DC End:***06/15/2012 |

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

**Report Period** Sep, 2013 (MDRC) **Project Phase** Closing

***Risk Level*** *On Track*

**Monthly Update** September activities have consisted of post collection processing needs.

MDRC staff began analysis of the fall data submission in late summer and required quite a bit of support. Additionally, they asked for SRO's assistance managing select data files for which they had limited access due to data agreements with participating school districts.

In tandem with our support of the fall data submission, SRO spent a considerable amount of time QCing and cleaning the data for the teacher survey (spring administration only). There was some additional Illume programming that had to be done to accommodate the inconsistencies in data supplied by teachers, and considerable time spent rectifying discrepancies on open field questions.

**Special Issues** The project is currently projecting an overrun of about $17,000.
What began as a small overrun quickly grew due to the circumstances described above.

I've discussed the issue with the SPA and the PI, and a supplementary budget in the amount of $9,000 was submitted to the client the week of 9/22 in an effort to offset some of the overrun.

**Cost**
**Sep 30, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 736,557.67 |
| ***Estimated Cost at Completion*** | 752,186.21 |
| ***Total Budget:*** | 734,890.00 |
| ***Variance (Budget minus E$AC):*** | -17,296.21 |

**Measures**

| | **Units Complete** | **RR** | **HPI** |
|---|---|---|---|
| ***Current Goal:*** | 19 Schools Overall | 90% Overall | N/A |
| ***Goal at Completion:*** | 19 Schls Fall/Spring | 90% Overall | N/A |
| ***Current actual:*** | 19 Schools Fall | 98% Fall | N/A |
| ***Estimate at Complete:*** | 19 Schls Fall/Spring | 94% Spring | N/A |
| ***Variance:*** | | | |

**Other Measures** Teacher survey Response Rate = 80%
RR at Completion = 97%

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

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

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

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

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

**Project Team**

| | |
|---|---|
| ***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** 08/2012 - 05/2013

**Milestone Dates**

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

**Other Project Team Members**

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".

**Report Period** Sep, 2013 (MCEE) **Project Phase** Implementing

***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**
**Aug 31, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 2,552,283.96 |
| ***Estimated Cost at Completion*** | 3,103,596.82 |
| ***Total Budget:*** | 4,900,000.00 |
| ***Variance (Budget minus E$AC):*** | 1,796,403.18 |

**Measures**

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

**Other Measures**

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**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:*** 226,233.00 ***InDirect Budget:*** 125,560.00 ***Total Budget:*** 351,793.00

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

**Project Team**

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

**Description:**

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

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

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

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

**Project Period** 08/2012 - 07/2015 **Proposal No:** 12-0003R04

**Data Collection** 04/2014 - 07/2015

**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

**Report Period** Sep, 2013 (MTF-WPSP Year 2) **Project Phase** Implementing

***Risk Level*** *Not Rated*

**Monthly Update** The new budget is now in CRS.

Programming continues on Illume SMS and CRLM. Programming has started on SSL CATI. Communication between Illume SMS, CRIMS, and CRLM is being put in place. Plans are being made to carry out an internal SRO testing during the first week of October. This will test the communication between the systems. Things are progressing well.

**Special Issues**

**Cost Aug 31, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 48,513.08 |
| ***Estimated Cost at Completion*** | 233,959.85 |
| ***Total Budget:*** | 351,793.00 |
| ***Variance (Budget minus E$AC):*** | 117,833.15 |

**Measures**

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

**Other Measures**

---

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

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

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

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

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

**Project Team**

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

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

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

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

**Milestone Dates**

| | | | |
|---|---|---|---|
| ***PreProduction Start:*** | 03/20/2013 | ***Pretest Start:*** | |
| ***Pretest End:*** | | ***Recruitment Start:*** | 03/20/2013 |
| ***Staffing Completed:*** | 04/12/2013 | ***GIT Start:*** | |
| ***SS Train Start:*** | 05/10/2013 | ***SS Train End:*** | 05/14/2013 |
| ***DC Start:*** | 05/15/2013 | ***DC End:*** | 08/12/2013 |

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

**Report Period** Sep, 2013 (MTF NR 2013) **Project Phase** Closing

***Risk Level*** *On Track*

**Monthly Update** 2013 Non-response calling concluded on August 12. This year's project matched last year's in percentage of the sample found (45.6%), even though the addition of the Age 55 panel meant there were about 700 more lines to call (10,226 as opposed to 9,535) with the same number of production hours available. This increased efficiency speaks well to our interviewers' efforts. Other factors that contributed to the project's success included a revamped sample-release protocol and the change of our outgoing caller ID to the SSL toll-free number. Besides being productive and efficient, the interviewers also produced high-quality work, based on feedback from the MTF staff who reviewed all finalized cases.

**Special Issues**

**Cost Sep 30, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 270,814.89 |
| ***Estimated Cost at Completion*** | 278,180.45 |
| ***Total Budget:*** | 294,563.00 |
| ***Variance (Budget minus E$AC):*** | 16,382.55 |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| ***Current Goal:*** | 7,500 | | 1.2 Finds/hr |
| ***Goal at Completion:*** | 7,500 | | 1.2 Finds/Hr |
| ***Current actual:*** | 7,474 | | 1.2 Finds/hr |
| ***Estimate at Complete:*** | 7,474 | | 1.2 Finds/Hr |
| ***Variance:*** | | | |

**Other Measures** 4,663 found respondents, 2,595 returned questionnaires as of the end of calling

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**Project Name** National Survey of Family Growth (NSFG 2010-2020)

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

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

**Budget** ***Direct Budget:*** 29,643,043.00 ***InDirect Budget:*** 10,415,123.00 ***Total Budget:*** 40,058,166.00

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

**Project Team**

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

**Description:** The NSFG is a national survey of women and men 15-44 years of age designed to provide national estimates of factors affecting pregnancy and birth rates, including sexual activity, cohabitation, marriage, divorce, contraceptive use, miscarriage and stillbirth, infertility, and use of medical services for family planning and infertility. NSFG 2010-2020 includes eight years of continuous data collection starting in September 2011 and ending in 2019. Every year, new PSUs will be selected to replace last year's non-self representing PSUs and self-representing PSUs, and the project will continue to collect data from a set of major self representing PSUs throughout the entire data collection period. Target number of interviews is approximately 5000 per year.

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

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

**Milestone Dates**

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

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

**Report Period** Sep, 2013 (NSFG 2010-2020) **Project Phase** Implementing

***Risk Level*** *On Track*

**Monthly Update** In this reporting period, data collection continued for Year 2 and interviewers for the third year of data collection were trained. We continue with experimental work on model-based listing reduction (not listing in some segments for the next quarter). We are also continuing our feasibility testing of data entry of interview observations on a smart phone application. Low eligibility was an issue in Quarters 7 and 8, but while eligibility ran low, it was quite similar to the predicted eligibility on the segments as measured by eligibility models. In Year 3, we're running an incentive experiment to see if paying $60 instead of $40 in Phase 1 improves efficiency and response rates.

**Special Issues** Contract modification 6 has been processed to restructure the contract so that contract line items are in yearly increments. This should help with the flow of funds and monitoring the contract. The contract amount remains at 40,058,166. Contract modification 7 will hopefully raise the contract amount by $95K to fund the incentive experiment (this mod is in progress). Modification 8 provides additional funding to the contract (already processed).

**Cost Aug 30, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 10,026,670.10 |
| ***Estimated Cost at Completion*** | 40,058,166.00 |
| ***Total Budget:*** | 40,058,166.00 |
| ***Variance (Budget minus E$AC):*** | 0.00 |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| ***Current Goal:*** | 1300 | 75% | 9.1 |
| ***Goal at Completion:*** | 1300 | 75% | 9.1 |
| ***Current actual:*** | 87 (current Q9) | 31% (current Q9) | 9.8 (cumulative) |
| ***Estimate at Complete:*** | 1300 | 75% | 9.8 |
| ***Variance:*** | 0 | 0 | .7 |

**Other Measures**

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**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)

**Project Team**

| | |
|---|---|
| ***Project Lead:*** | Shonda R Kruger-Ndiaye |
| ***Budget Analyst:*** | William Lokers |
| ***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** 03/2013 - 12/2013

**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:*** | 12/06/2013 |

**Other Project Team Members**

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

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

***Risk Level*** *Some Concerns*

**Monthly Update**

August and September work (to-date) included:

- On-going Production Monitoring
  - Evaluation of progress against goals (on-going challenges meeting production goals)
  - Consolidation of Iwers and reassignment of sample to keep strongest iwers efficient
- On-going Budget Monitoring
- Implementation of e-mail contact protocol
- Modeling of likely RR outcomes
- Discussion of possibly increased R incentive

**Special Issues** The "Some Concerns" status indicator reflects the fact that the weekly HPI is outpacing projections and we have not been able to achieve the target weekly iw yield for many weeks. It's likely that we will conclude with a lower yield and RR. Project Staff are aware of this concern.

**Cost Aug 31, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 3,726,680.19 |
| ***Estimated Cost at Completion*** | 4,830,213.11 |
| ***Total Budget:*** | 5,035,630.00 |
| ***Variance (Budget minus E$AC):*** | 205,415.89 |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| ***Current Goal:*** | 9,098 | | 5.39 |
| ***Goal at Completion:*** | 9,470 | 94% overall | 5.8 |
| ***Current actual:*** | 8,261 | 84% | 5.42 |
| ***Estimate at Complete:*** | 9,470 | 93% overall | 6.0 |
| ***Variance:*** | 0 | 1.06% | 0.2 hrs |

**Other Measures** Note: Completes, RR and HPI are through week 28 (9/21/2013). HPI is Cumulative Production HPI.

Target completed iws is under revision (based upon revised splitoff and NS projections). Estimated RR at Completion is under intense discussion and may change, particularly if project staff reject a proposed, special end game R incentive.

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

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

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

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

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

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

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

**Project Period** 01/2011 - 06/2012 **Proposal No:** 10-0003R01
**Data Collection** 03/2012 - 06/2012

**Milestone Dates**

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

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

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**Report Period** Sep, 2013 (iPhone) **Project Phase** Closing

***Risk Level*** *On Track*

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

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

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

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

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

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

March '12
The interviewers were trained in March. A brief pilot of the system followed the training. 40 interviews (10 in each mode) were conducted to test to make sure everything was working correctly. The feeling thermometer questions were dropped after the pilot due to them being problematic in IVR. There were other recognitions issues identified in IVR. Production began at the very end of March in three modes (human-voice, human-text, and automated-text). Refinement of the IVR will continue and will data collection will resume with that once things have been addressed.

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

Apr. '12
The study has progressed well. There were initial problems with IVR which have been fixed. The human interviewing is almost complete. It is expected to finish in early May. Human text interviews will be the first group to finish. Recruiting has been a bit of a hinderance. We have continued to recruit due to not being able to recruit a large enough sample to keep the interviewers busy (between the size of the sample and the calling rules). For the second experiment we will need to recruit a larger group before getting started to keep the group more efficient. The overall HPU has been low but could be lower due to the previous explained ineffiency. There have been some sporadic payment problems but is seems to be due to the user and technical issues rather than the codes provided not being good. The first experiement is expected to be finished prior to AAPOR. The second experiment will start at some point after that (in June or July).

May '12
The first experiment concluded data collection in early May. The goal was 600 interviews. We ended with 642 across all four modes Human text interviews was the first group to finish with the IVR group the last to finish. The IVR group started later due to technical issues. They did finish quite rapidly due to it being an automated system.

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

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

June '12
The one developer left at Parsons has made most of the changes to the system for the second experiment. The New School is in contact with one of the developers on the project who has graduated and been unresponsive about fixing the few items he programmed. Once that has happened we can move forward with further testing and a pilot.

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

July '12
Two trainings for interviewers were held. A refresher for those continuing on the project along with what changed and a separate training for those who were experienced in interviewing but new to the project. A test of the system was done with cases for a week which rolled into data collection. We started recruiting to build up a larger pool of cases so we can avoid the issue of running out of cases that we had during the first experiment.

August '12
Data collection for experiment two began in August. So far things have gone smoothly. We will need to interview into September. We will continue recruiting to try and keep the available pool up to keep the staff busy. We are in a better position at the start then we were when experiment 1 began. More iTunes codes will need to be ordered at some point. There is some uncertainty about how many people will switch modes and to which modes they will switch. We will adjust staffing accordingly to go with the flow.

September '12
Data collection for experiment two concluded in September. Things went smoothly. A debriefing was held with the

PIs and the interviewing staff at the end of the month. The interviewing staff provided insight to how this worked and things the researchers needed to think about.

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

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

October '12
Due to the busy schedule of the PIs, Andrew is helping the research team with the analysis moving forward. Most work in SRO is done. Andrew is working on getting the accounts extended out so he can continue working on the project through the analysis phase. The team is working on deciding the presentations that will be given for AAPOR.

November/December '12
We purchased two Mac laptops with the PI approval on the SRO accounts. Andrew has one and one of the grad students (Chris Antoun) has the other. The laptops are needed to do the interaction coding. The software for the interaction coding only runs on the Mac. The accounts have been extended through the end of the project period (Sept. '13). The project will likely apply for a no cost extension. The work has turned towards the analysis. Andrew will be assisting the research staff with this task moving forward.

January '13
Andrew has created a coding application to code the open ended answers related to mode choice. Andrew and two graduate students will code the open-ended answers (and calculate inter-rater reliability). Andrew spoke with the PI and budgeted some travel on the SRO budget. This will cover the PIs, two graduate students and two SRO staff members to go to presentations related to the project at the Cannell Interviewer Respondent Interaction Workshop, AAPOR and IFDTC. The remainder of the funds will be going back to the PI. Work continues on the analysis of the data collected for the Cannell Interviewer Respondent Interaction workshop, AAPOR, IFDTC and ESRA.

February '13
Andrew and two gradutate students have been working through the coding scheme and have coded a few cases. We met after those few cases to calibrate how we were coding particular items and adjusted/added codes as necessary. Coding will continue and then a reliability calculated. The project will be covering conference expenses for Lloyd (IFDTC) and Andrew (Interviewer/Respondent Interaction Workshop/AAPOR/IFDTC).

March '13
Andrew and two gradutate students coded the open ended data on why participants selected the mode they chose for experiment 2. Analysis work on the three AAPOR presentations and two IFDTC presentations continues. The project will be covering conference expenses for Lloyd (IFDTC) and Andrew (Interviewer/Respondent Interaction Workshop/AAPOR/IFDTC) and for others on the project team to travel to conferences (AAPOR/IFDTC/ESRA).

April '13
Analysis work on the three AAPOR presentations and two IFDTC presentations continues. The remaining SRO project funds will be covering conference expenses for Lloyd (IFDTC) and Andrew (Interviewer/Respondent Interaction Workshop/AAPOR/IFDTC) and for others on the project team to travel to conferences (AAPOR/IFDTC/ESRA).

May '13
The remaining SRO project funds will be covering conference expenses for Lloyd (IFDTC) and Andrew (Interviewer/Respondent Interaction Workshop/AAPOR/IFDTC) and for others on the project team to travel to conferences (AAPOR/IFDTC/ESRA). Project team members gave presentations at the following conferences in May: Interviewer/Respondent Interaction Workshop (1), AAPOR (4), IFDTC (2). Beginning in June work will focus on writing the first set of paper manuscripts.

June '13
The remaining SRO project funds will be covering conference expenses for Lloyd (IFDTC) and Andrew (Interviewer/Respondent Interaction Workshop/AAPOR/IFDTC) and for others on the project team to travel to conferences (AAPOR/IFDTC/ESRA). Project team members gave presentations at the following conferences in May: Interviewer/Respondent Interaction Workshop (1), AAPOR (4), IFDTC (2). Work this month focused on reconciliation of the May travel expenses and work began to focus on writing the first set of paper manuscripts. In July travel arrangements will be made for the members of the team going to SIGdial in Metz, France.

July '13

The remaining SRO project funds will be covering conference expenses for travel arrangements for the members of the team going to SIGdial in Metz, France. Work over the summer has been light since the graduate students working on the project are out of town. The focus will move back to writing the first set of paper manuscripts once everyone is back from travel/vacations/etc. in September.

August '13
Two members of the team traveled to France to give a presentation at a conference (SIGdial). Expenses are being reconciled from that trip. Focus in September has returned to writing the first set of paper manuscripts. The SRO account close at the end of September. A final report with the costs incurred on the SRO side will be submitted as the final monthly report.

**Special Issues**

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

Working on how to recruitn participants and pay the via iTunes.

**Cost**
**Aug 31, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 194,561.15 |
| ***Estimated Cost at Completion*** | 205,777.56 |
| ***Total Budget:*** | 221,976.00 |
| ***Variance (Budget minus E$AC):*** | 16,198.44 |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| ***Current Goal:*** | 300/600 | | |
| ***Goal at Completion:*** | 300/600 | | |
| ***Current actual:*** | 341/625 | | |
| ***Estimate at Complete:*** | | | |
| ***Variance:*** | | | |

**Other Measures**

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**Project Name** Surveys of Consumer Attitudes (SCA 2013)

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

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

**Budget** ***Direct Budget:*** 855,961.00 ***InDirect Budget:*** 0.00 ***Total Budget:*** 855,961.00

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

**Project Team**

| | |
|---|---|
| ***Project Lead:*** | Joseph Matthew |
| ***Budget Analyst:*** | |
| ***Production Manager:*** | Bonnie C Andree |
| ***Senior Project Advisor:*** | Mary P Maher |
| ***Production Manager:*** | |
| ***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** 01/2013 - 12/2013 **Proposal No:** 13-0036
**Data Collection** 01/2013 - 12/2013

**Milestone Dates**

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

**Other Project Team Members**
Dave Dybicki
Pamela Swanson
Bonnie C Andree
Ann Munster

**Report Period** Sep, 2013 (SCA 2013) **Project Phase** Implementing

***Risk Level*** *Not Rated*

**Monthly Update** No update information added for September.

**Special Issues**

**Cost**
**Sep 30, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 0.00 |
| ***Estimated Cost at Completion*** | 0.00 |
| ***Total Budget:*** | 855,961.00 |
| ***Variance (Budget minus E$AC):*** | 0.00 |

**Measures**

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

**Other Measures**

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**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)

**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** 10/2012 - 12/2016

**Milestone Dates**

| | |
|---|---|
| ***PreProduction Start:*** 01/01/2012 | ***Pretest Start:*** 09/04/2012 |
| ***Pretest End:*** 09/12/2012 | ***Recruitment Start:*** 10/21/2013 |
| ***Staffing Completed:*** | ***GIT Start:*** |
| ***SS Train Start:*** | ***SS Train End:*** |
| ***DC Start:*** 10/23/2012 | ***DC End:*** 11/26/2012 |

**Other Project Team Members**

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

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**Report Period** Sep, 2013 (SCIP) **Project Phase** Planning

***Risk Level*** *Some Concerns*

**Monthly Update** Totals above reflect Year 2 budget & estimates.

**Special Issues** Although we'd hoped Dave might be able to handle the programming, given SCA and TA demands, I am doing the Illume programming myself but will need assistance from Hueichun to include a graphic/map (not interactive; just informative), and I will need assistance setting up the paradata collection and with sample management.

**Cost**
**Sep 30, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 497.88 |
| ***Estimated Cost at Completion*** | 63,029.01 |
| ***Total Budget:*** | 426,980.00 |
| ***Variance (Budget minus E$AC):*** | 6,108.99 |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| ***Current Goal:*** | 6600 | | |
| ***Goal at Completion:*** | 6600 | | |
| ***Current actual:*** | 0 | | |
| ***Estimate at Complete:*** | | | |
| ***Variance:*** | | | |

**Other Measures**

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**Project Name** The Role of Housing in Children's Healthy Development (H&C)

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

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

**Budget** ***Direct Budget:*** 257,031.00 ***InDirect Budget:*** 48,931.00 ***Total Budget:*** 305,962.00

**Principal Investigator/Client**

Dan Keating (University of Michigan)
Sandra Newman (Johns Hopkins University)
Tama Leventhal (Tufts University)

**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** 06/2014 - 12/2015

**Milestone Dates**

| | |
|---|---|
| ***PreProduction Start:***07/01/2013 | ***Pretest Start:***02/01/2014 |
| ***Pretest End:***02/22/2014 | ***Recruitment Start:***01/06/2014 |
| ***Staffing Completed:***05/15/2014 | ***GIT Start:***06/18/2014 |
| ***SS Train Start:***06/20/2014 | ***SS Train End:***06/25/2014 |
| ***DC Start:***06/26/2014 | ***DC End:***12/31/2015 |

**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)

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**Report Period** Sep, 2013 (H&C) **Project Phase** Planning

***Risk Level*** *Attention!*

**Monthly Update** Funding: A format budget was prepared and submitted for the period September through December 2013. This budget has not yet been approved by the PIs. The SRC Director and SRO Pre-Award staff have established a regular meeting with the PIs to discuss funding and workscope. When total funding for the project is known, a Wave 1 workscope and budget must be established. We do know that the federal proposals for the project are being cut by 17-18%, which implies work scope cuts.

Project Schedule: A project schedule was delivered to the PIs and discussed. The current plan is to train pretest interviewers during the last week of January 2014, and pretest during the month of February. Production training is currently planned for the end of June 2014.

Sampling: Several meetings have been held with the research team to discuss sampling. The research team would like to obtain a 3:2:1 ratio of low-middle-high income families by selecting block groups within each city-area. The plan to sample block groups was thought to alleviate the need to conduct doorstep screening for household income. Unfortunately, income distribution in block groups is more heterogeneous that anticipated, especially in Seattle and Denver. A SDG meeting was held on Sept 13, 2013 to discuss options for sampling that do not include screening for income. The SRO sampling team continues to meet to work through possible options.

Questionnaire Design: The questionnaire received from the team in June 2013 had not been thoroughly vetted by the research team and was missing a few key elements. A few sections require extensive work, and a few key elements of the questionnaire are still under discussion by the research team. The research team has requested in-depth assistance with the adult questionnaire design. Grant Benson and Lisa Holland have been assigned to work a limited number of hours to develop several sections or key questions in the questionnaire. A draft, fully specified questionnaire for the adult was delivered to the research team on September 11. As of 9/26/2013, no modules for the adult questionnaire have been approved for programming by the research team.

The screening instrument is being discussed, and will be modified to meet the requirements of the new research team. A fully-specified child-session and child-post interview observations was delivered to the research team on Sept 23, and is currently under discussion. In addition to this, we are working with the research team to develop several new measures, including training and certification for those measures (q-sort observations, household laser tape measurements).

IRB: Johns Hopkins approved an IRB submission prepared by the JHU PI in July 2013. The UM IRB was reviewed on September 19. We have received approval with minor contingencies, and expect to receive full approval in early October. A Certificate of Confidentiality application will be prepared by the PI in October 2013.

Programming/Technical Systems: The project management team is testing the Hearts & Flowers program on several platforms. Some adjustments to the programming may be required. Preliminary programming on the adult

questionnaire that was required to eliminate sections removed by the research team and calibrate to the June 2013 version of the questionnaire is underway. SurveyTrak has been restored. The design is under review to determine if it is still applicable to the current work scope. SurveyTrak specifications are being updated to reflect the current state of the instrument. Work is also being done to test several mobile applications and reduce the amount of equipment carried into the field by interviewers. Testing is being done on an application that will allow the laptop camera to read barcodes (eliminating the need for a separate and costly barcode reading device). Testing is also being done on small tablet computers that could be used by interviewers to complete in-home observations while the respondent is completing ACASI. Applications designed to use mobile devices to conduct laser tape measurements were found to be inaccurate and therefore not suitable for use in data collection. A small team is developing specifications for a tracking/address update system.
Production Mgt/Field Recruitment & Hiring: The production team is in the process of revising and preparing materials for training and data collection, recruitment & hiring, and field communications & management. Position postings for team leaders and a PC have been posted.
Procurement: A small procurement team is working to create a list of materials to be procured, specifications for those materials, and a list of preferred vendors. One sole-source procurement will be required for noise meters, and at least one bidded procurement will be needed for printing/scanning services. We are investigating using an outside vendor for kitting.

**Special Issues**

Finance/Budget: The project is not currently funded for operations, for pretest or production. There is no Wave 1 budget, and the work scope appears to be out of sync with what will be available funding. We risk developing/programming questionnaires and measurements that cannot be used due to lack of funding. (NOTE: this is being worked by the ISR PI, the SRC Director's Office, and SRO PreAward).
Schedule: The PIs have not approved any part of the questionnaire or measurements for programming, which will quickly begin to impact project schedule. Several measurements require development by the research team. The PIs have been given a project schedule. While technically they have not yet missed a deadline, the first deadline is next week. It appears unlikely that the deadline will be met.

**Cost**
**Aug 31, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 203,737.88 |
| ***Estimated Cost at Completion*** | 1,315,216.00 |
| ***Total Budget:*** | 305,962.00 |
| ***Variance (Budget minus E$AC):*** | 0.00 |

**Measures**

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

**Other Measures**

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**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)

**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** 10/2013 - 04/2014

**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

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**Report Period** Sep, 2013 (TA 2013) **Project Phase** Implementing

***Risk Level*** *On Track*

**Monthly Update** Transition to SMS has been completed and most issues worked out. Conducting final production tests before the data collection launch on 10/01.

Staffing: 33 interviewers, 4 TLs. Most interviewers are on-staffers from DUST, PSID, T3, and SCA. Only 2 new-hires.

**Special Issues** DRI system will not be operational for launch (approved by PIs). QC will use live monitoring.

**Cost**
**Sep 11, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 66,856.75 |
| ***Estimated Cost at Completion*** | 673,399.72 |
| ***Total Budget:*** | 686,749.00 |
| ***Variance (Budget minus E$AC):*** | 13,350.00 |

**Measures**

| | Units Complete | RR | HPI |
|---|---|---|---|
| ***Current Goal:*** | n/a | n/a | 4.0 |
| ***Goal at Completion:*** | 2163 | 92% | 5.0 |
| ***Current actual:*** | n/a | n/a | n/a |
| ***Estimate at Complete:*** | n/a | n/a | n/a |
| ***Variance:*** | | | |

**Other Measures**

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

**Project Mode** Primary: Web

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

**Budget** ***Direct Budget:*** 47,765.00 ***InDirect Budget:*** 0.00 ***Total Budget:*** 47,765.00

**Principal Investigator/Client** Mr. Peter Niedbala (Director of Pharmacy Advancement U of M)

**Project Team**

| | |
|---|---|
| ***Project Lead:*** | Esther H Ullman |
| ***Budget Analyst:*** | |
| ***Production Manager:*** | |
| ***Senior Project Advisor:*** | Zoanne Blackburn |
| ***Production Manager:*** | |
| ***Production Manager:*** | |

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

**Project Period** 12/2012 - 06/2013 **Proposal No:** 13-0005R01

**Data Collection** 02/2013 - 05/2013

**Milestone Dates**

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

**Other Project Team Members**

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**Report Period** Sep, 2013 (UMCOP Alum Study) **Project Phase** Closing

***Risk Level*** *On Track*

**Monthly Update** In August the final Project Review was held for this project. During end of August, beginning of September some additional data requests were made by the client and data ops delivered this file. No additional charges to the account expected. Budget analyst will move to close accounts and final reports and archive materials will be completed.

**Special Issues**

**Cost**
**Aug 31, 2013**

| | |
|---|---|
| ***Total Cost to Date (Direct + Indirect):*** | 45,964.22 |
| ***Estimated Cost at Completion*** | 45,964.22 |
| ***Total Budget:*** | 47,765.00 |
| ***Variance (Budget minus E$AC):*** | 1,800.78 |

**Measures**

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

**Other Measures**