

Survey Research Operations

Monthly Project Report

Sponsored Projects

January 2014



Sponsored Projects

(CogEcon2013 Web/Mail Study) *Cognitive Economics 2013*
 (COGUSA 6_7) *Assessing and Improving Cognitive Measures in the HRS*
 (DUST II 2013) *Health and Daily Life*
 (H&C) *The Role of Housing in Healthy Child Development*
 (HRS CAMS13) *HRS Consumption and Activity Study*
 (HRS HCNS) *HRS Health and Nutrition Mail Study*
 (MCEE) *Michigan Council on Educator Effectiveness*
 (MDRC) *MDRC - Reading Partners Program Evaluation Project*
 (MRRS III) *Effects of Recession and Economic Stimulus in Southeast Michigan Wave III*
 (MTF-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*
 (SRS W3) *Social Relations, Aging and Health: Competing Theories and Emerging Complexities, Wave 3*
 (TA 2013) *Transition to Adulthood (2013)*
 (Transcript Study) *Impact of the Michigan Merit Curriculum & Michigan Promise Scholarship on Studen*

Project Name Assessing and Improving Cognitive Measures in the HRS (COGUSA 6_7)

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

Project Type Sponsored Projects **Project Status** Current

Budget **Direct Budget:** 391,530.00 **Indirect Budget:** 213,384.00 **Total Budget:** 604,914.00

Principal Investigator/Client Robert Willis (University of Michigan)
Jack McArdle (University of Southern California)
Gwen Fisher (Colorado State University)

Project Team

Project Lead: Zoanne Blackburn
Budget Analyst: Dean E Stevens
Production Manager: Esther H Ullman
Senior Project Advisor: Kirsten Haakan Alcser
Production Manager: Lisa J Carn
Production Manager:

Description: The purpose of this study is to continue the work done for Assessing and Improving Cognitive Measurements in the HRS last conducted in 2012/2013 (CogUSA 4/5 and CogUSA NGCS Supplement) – exploring the ways to best collect cognitive ability information from respondents across various modes. One of the research goals of this project is to consider whether unbiased cognitive measures of adults can be collected in a reliable and valid fashion via the Web.

Project Period 07/2011 - 04/2015 **Proposal No:** SO #: 10-0032R02

Data Collection 02/2014 - 07/2014

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

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

Report Period Jan, 2014 (COGUSA 6_7) **Project Phase** Implementing

Risk Level On Track

Monthly Update Activities in January included testing both instruments, fine tuning the logic, and testing our sample management systems. In addition, we began meeting with Lisa Carn to go over staffing needs. She then worked with the Lab staff to obtain interviewers for our February training. Work was done on the interviewer training manual as well. Data Operations received production preload from the Project Staff and began work to format the files so we can request respondent incentive checks, create invitation letters and load production sample in both SMS and Illume.

Special Issues In response to a request from SSL Manager, we will be releasing the Wave 6 telephone sample in 3 replicates. This is because there was a problem with Wave 4 respondents calling in to do the interview and overwhelming the available staff. Releasing in replicates may stretch out the data collection into August, but Project Staff is fine with this.

Cost

Dec 31, 2013 **Total Cost to Date (Direct + Indirect):** 83,606.73
Estimated Cost at Completion 576,131.97
Total Budget: 604,914.00
Variance (Budget minus E\$AC): 28,782.03

Measures

Units Complete

RR

HPI

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

Project Name Cognitive Economics 2013 (CogEcon2013 Web/Mail Study)

Project Mode Primary: Mixed Total of Modes: 2

Project Type Sponsored Projects **Project Status** Current

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

Principal Investigator/Client Robert Willis (SRO)

Project Team

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

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

Project Period 06/2013 - 03/2014 **Proposal No:** SRO# 13-0040
Data Collection 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 Jan, 2014 (CogEcon2013) **Project Phase** Closing

Risk Level On Track

Monthly Update Project close-out is underway, final project review held in December. Final RR is .81 which is higher than last wave. We are within budget.

Special Issues

Cost

Jan 31, 2014

Total Cost to Date (Direct + Indirect):	100,012.01
Estimated Cost at Completion	134,110.20
Total Budget:	134,797.00
Variance (Budget minus E\$AC):	685.80

Measures

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

Other Measures

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

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

Project Type Sponsored Projects **Project Status** Current

Budget **Direct Budget:** 575,516.00 **Indirect Budget:** 78,409.00 **Total Budget:** 653,925.00

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

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
Data Collection 06/2013 - 10/2013

Proposal No: #13-0019R01

Milestone Dates

PreProduction Start:03/05/2013
Pretest End:
Staffing Completed:04/16/2013
SS Train Start:06/11/2013
DC Start:06/17/2013

Pretest Start:
Recruitment Start:03/15/2013
GIT Start:
SS Train End:06/12/2013
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

Report Period Jan, 2014 (MRRS III) **Project Phase** Implementing

Risk Level On Track

Monthly Update

The MRRS missing data only callbacks began Thursday, October 31, 2013 and the reconsent callbacks began Thursday, November 7th in the SSL. As of Tuesday, January 28, 2014, As of Tuesday, January 28, 2014, 457 (87.2%) respondents fully completed the callback, two (0.4%) respondent partially completed the callback, five (1%) respondents refused to complete the callback, one informant refused (0.2%) on behalf of the respondent, and eleven (2.1%) were coded final other reason due to non-working phone numbers. The SSL will wrap-up their calling effort on 2/1/14.

During main data collection, 781 interviews were completed (93.4% response rate). R781 interviews were completed (93.4% response rate) during main data collection. If we remove the 26 cases that still need to be reconsented, the response rate would be 90.3%. With the callback effort, we have achieved getting back to the minimum 90% response rate required for MRRS 3.

On January 31st, a mailing will be sent out to the respondents that we were unable to reach during the callback asking them to sign the paper consent form and/or answer the questions on paper and mail them back to Ann Arbor by February 10, 2014. Any completes received as of 2/16/14 will be included in the final data delivery. Stats group will receive the final data set around 2/17/14 for weighting.

Special Issues

Cost

Dec 31, 2013

Total Cost to Date (Direct + Indirect): 564,864.44
Estimated Cost at Completion 632,060.07
Total Budget: 653,925.00
Variance (Budget minus E\$AC): 21,864.93

Measures	Units Complete	RR	HPI
Current Goal:	752	90%	4.34
Goal at Completion:	752	90%	4.34
Current actual:	781	93.4%	4.79
Estimate at Complete:			
Variance:			

Other Measures

Project Name	Health and Daily Life (DUST II 2013)		
Project Mode	Primary: Telephone Total of Modes: 1		
Project Type	Sponsored Projects		Project Status Current
Budget	Direct Budget: 744,423.00	InDirect Budget: 459,804.00	Total Budget: 1,204,227.00
Principal Investigator/Client	Vicki Freedman (UM, ISR, SRC)		

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:	02/28/2014

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

Report Period Jan, 2014 (DUST II 2013) **Project Phase** Implementing

Risk Level On Track

Monthly Update DUST is a diary study of English-speaking PSID respondents, age 60 and older, who completed the 2013 PSID interview, plus their spouse or communal partner. Each respondent is asked to complete two telephone interviews, each on specified days of the week, and report on their activities over a 24-hour period. Studies of this sort are often referred to as "Time Use" studies. There is a screening interview (CS) that is used to verify eligibility and to set specific appointments with the eligibles. The first time diary (TD1) averages about 55 minutes in length, while the second one (TD2) averages about 35 minutes. Both TD1 and TD2 also contain a small amount of non-diary content. The months of August and September have been spent in completing diaries. All of the CS sample has been attempted now (although a small bit of additional sample will be provided at the end of October), and a lot of effort is being made to complete more CS, which will in turn generate appointments for the diaries. We are working to try to

determine whether or not the desired response rate will be attainable, given the status of the sample. Our initial projections were that the 80% response rate would be difficult to attain, however a number of interventions in the last month have helped to boost production and these now make that projected rate more likely. Following the interventions mentioned in the previous month's report, plans have begun to announce a bonus incentive of \$25 additional that will be provided to all remaining sample member after they complete their diaries. The added bonus was implemented on December 2 and has had a positive effect on production activity, with a significant increase in the number of completed cover screens, even among lines that had never previously picked up the phone to speak with us. In fact the number of never contacted lines has been cut by more than 50%; there are now fewer than 2.4% of the sample that has never been reached. In January, we enacted our final end game measures by sending a post card (inside an envelope for confidentiality purposes) that informed them that the "Holiday bonus" of \$25 was extended into this month. This effort generated a nice increase in the number of completed cover screens. Cover screen production is nearly exhausted at the end of January and through the month of February we will concentrate on completing the remaining time diaries as we close out the data collection.

Special Issues

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

Cost
Jan 31, 2014

Total Cost to Date (Direct + Indirect): 889,137.48
Estimated Cost at Completion 1,064,795.20
Total Budget: 1,204,227.00
Variance (Budget minus E\$AC): 139,431.80

Measures

	Units Complete	RR	HPI
Current Goal:	1321	75.5%	8.78
Goal at Completion:	1336	80%	8.99
Current actual:	1324	69.3%	7.09
Estimate at Complete:	1336	80%	8.00
Variance:	0	0.00%	0.99

Other Measures

Project Name	HRS Consumption and Activity Study (HRS CAMS13)																								
Project Mode	Primary: Mail Total of Modes: 1																								
Project Type	Sponsored Projects			Project Status	Current																				
Budget	Direct Budget:	336,960.00	Indirect Budget:	121,307.00	Total Budget: 458,267.00																				
Principal Investigator/Client	David Weir (SRC) Mary Beth Ofstedal (SRC) Michael Hurd (RAND)																								
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	<table><tr><td>PreProduction Start:</td><td>08/07/2013</td><td>Pretest Start:</td><td></td></tr><tr><td>Pretest End:</td><td></td><td>Recruitment Start:</td><td></td></tr><tr><td>Staffing Completed:</td><td></td><td></td><td></td></tr><tr><td>SS Train Start:</td><td></td><td>SS Train End:</td><td></td></tr><tr><td>DC Start:</td><td></td><td>DC End:</td><td></td></tr></table>					PreProduction Start:	08/07/2013	Pretest Start:		Pretest End:		Recruitment Start:		Staffing Completed:				SS Train Start:		SS Train End:		DC Start:		DC End:	
PreProduction Start:	08/07/2013	Pretest Start:																							
Pretest End:		Recruitment Start:																							
Staffing Completed:																									
SS Train Start:		SS Train End:																							
DC Start:		DC End:																							

Important Project Dates

Initial Mailing:10/10/2013
2nd Follow Up (postcard):11/20/2013

1st Follow Up Mailing:11/06/2013
3rd Follow Up Mailing:12/06/2013

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)

Report Period

Jan, 2014 (HRS CAMS13)

Project Phase

Implementing

Risk Level

On Track

Monthly Update

The final CAMS mailing was sent via USPS Priority Mailer on 12/06/13 to 2309 nonresponders. CAMS response rate continues to trail last wave by about 2%. We mailed to new addresses found through batch searching respondents whose packets were returned as undeliverable, and for whom we had no alternate address as well as to respondents with an alternate address in HRS ST. This produced 67 additional IWs. We have ceased contacting CAMS respondent to leave a window of time before contacts begin for HRS 2014 Core Data Collection on March 3rd.

Special Issues

Low response rates from new respondents screened in in 2010-11 continue to lower overall response rate. Although our internal goal has been 73%, the IRB application states desired goal to be at least 70% which we have just reached.

Cost Jan 23, 2014

Total Cost to Date (Direct + Indirect): 397,273.80
Estimated Cost at Completion 414,020.36
Total Budget: 458,267.00
Variance (Budget minus E\$AC): 31,071.64

Measures

	Units Complete	RR	HPI
Current Goal:	na	na	
Goal at Completion:	6412	73%	
Current actual:	5686	70%	
Estimate at Complete:	6412	73%	
Variance:			

Other Measures**Project Name**

HRS Health and Nutrition Mail Study (HRS HCNS)

Project Mode

Primary: Mail Total of Modes: 1

Project Type

Sponsored Projects

Project Status

Current

Budget

Direct Budget: 647,082.00 **Indirect Budget:** 258,491.00 **Total Budget:** 976,523.00

Principal Investigator/Client

David Weir (SRC)
Kenneth Langa (SRC)
Mary Beth Ofstedal (SRC)

Project Team

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

Description:

The Health Care and Nutrition Mail Study (HCNS) is a part of the Health and Retirement Study (HRS) umbrella of studies. The content of the study includes sections on health care access similar to content included in the HRS 2011 mail survey to determine health care access and satisfaction pre-health care reform; food security measures; and a food frequency questionnaire. The benefits of collecting nutritional data on HRS include the large, national sample, and representation of minority populations, as well as the breadth of health, economic and social variable. This will provide important new opportunities for researchers across multiple disciplines. The questionnaire is expected to take approximately 40 minutes to complete. The protocol will be similar to other HRS mail studies although condensed slightly to accommodate HRS core data collection. An initial questionnaire mailing with a \$20 incentive check will be followed up by reminder mailings at 3 weeks (questionnaire), 5 weeks (postcard), and 7 weeks (questionnaire). Printing, mailing, logging, and data scan will be done by Apperson. Respondent concerns will be addressed by SRO/SSL.

Project Period

07/2013 - 04/2014

Proposal No: 14-0024**Data Collection**

11/2013 - 02/2015

Milestone Dates**PreProduction Start:**08/01/2013**Pretest Start:****Pretest End:****Recruitment Start:****Staffing Completed:****GIT Start:****SS Train Start:****SS Train End:****DC Start:**11/20/2013**DC End:**04/30/2014**Important Project Dates****Eng Initial Mailing:**11/20/2013**Eng 1st Follow Up:**12/11/2013**Eng 2nd Follow Up:**12/23/2013**Eng 3rd Follow Up:**01/08/2013**Spanish Initial Mailing:**12/20/2013**Spanish 1st Follow Up:**01/11/2014**Spanish 2nd Follow Up:**01/27/2014**Other Project Team Members**

Maryam Buageila, Project Lead; Heidi Guyer, HRS Study Director; Patty Maher, SPA; Bonnie Andree, Help Desk supervisor; Rick Krause, budget analyst; Holly Ackerman, WebLog programmer; Joel Devonshire, data manager; Winter Taylor, project assistant

Report Period

Jan, 2014 (HRS HCNS)

Project Phase

Implementing

Risk Level

On Track

Monthly Update

English mail outs were all completed in 2013, except for re-mails to alternate addresses which have produced 67 completed questionnaires. Current response rate (66%) is lower than anticipated.

Spanish 1st and postcard reminders were mailed in January. Response is light with a 33% response rate for Spanish at the time of 2nd reminder.

Due to lower response, the expected response goal has been lowered to the actual IRB application goal of at least 70%. The SRO goal had been entered as 73% due to last wave response.

Special Issues

The holiday closure and holiday mail schedule, in addition to the shortened interval between the initial mail out and first reminder resulted in many respondents receiving reminders after having mailed their questionnaire. This contributed to high Help Desk call volume which continued through the middle of January.

The budget currently entered was the allocation from the 6 year HRS budget which was estimated with a larger sample size and a more expensive data processor. They are still discussing the benefit of submitting a budget that more accurately reflects the the work scope this late in production.

Cost

Jan 09, 2014

Total Cost to Date (Direct + Indirect): 386,376.05
Estimated Cost at Completion 657,234.17
Total Budget: 976,523.00
Variance (Budget minus E\$AC): 319,243.48

Measures

	Units Complete	RR	HPI
Current Goal:	na	na	na
Goal at Completion:	8400	70%	na
Current actual:	7498	61%	na
Estimate at Complete:	8400	70%	na
Variance:	248	0%	

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 Grey-Farquharson
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

Report Period Jan, 2014 (Transcript Study)

Project Phase

Closing

Risk Level *Not Rated*

Monthly Update SROs involvement in data collection is now over. Tenrox is closed. Deltex is also closed except for Donnalee Grey-Farquharson and Chrissy Evanchek (Financial analyst) in order to wrap up any loose ends that may appear. All accounts will be closed at the end of February 2014.

At the end of our involvement, 122 schools out of 140 had agreed to participate in the study.

Special Issues

Cost	Total Cost to Date (Direct + Indirect):	283,241.61
Dec 31, 2013	Estimated Cost at Completion	283,241.61
	Total Budget:	350,113.00
	Variance (Budget minus E\$AC):	66,871.39

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 End: Staffing Completed: 08/22/2012 SS Train Start: 09/25/2012 DC Start: 10/01/2012	Pretest Start: Recruitment Start: 07/27/2012 GIT Start: SS Train End: 09/27/2012 DC End: 06/15/2012
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Other Project Team Members	Becky Loomis Jessica Huff Rachel Rifkin
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Report Period	Jan, 2014 (MDRC)	Project Phase	Closing
Risk Level	On Track		
Monthly Update	<p>The supplementary budget for MDRC, in the amount of \$10,338.00, was approved and became available on 1/24/2014.</p> <p>We immediately resumed the work that had been put on hold while awaiting this transaction. The client reached out on 1/30/2014 to say the remaining data support pieces are a high priority, in that they will enable the client to finalize their work by their deadline.</p> <p>The project's lead and data manager have scheduled a client phone call for 1/31/2014 to field questions and finalize submissions.</p>		
Special Issues	<p>In CRS The project is currently projecting an overrun of \$10,265.01.</p> <p>The approved supplementary budget is in the amount of \$10,338.00, which should be reflected in next month's CRS.</p>		

Cost
Jan 31, 2014

Total Cost to Date (Direct + Indirect):	740,879.00
Estimated Cost at Completion	745,155.01
Total Budget:	734,890.00
Variance (Budget minus E\$AC):	-10,265.01

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%

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 End:****Staffing Completed:****SS Train Start:****DC Start:****Pretest Start:****Recruitment Start:****GIT Start:****SS Train End:****DC End:****Other Project
Team Members**

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

Report Period

Jan, 2014 (MCEE)

Project Phase

Closing

Risk Level*Not Rated***Monthly Update**

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

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

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

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

Special Issues

Cost	Total Cost to Date (Direct + Indirect):	3,080,281.75
Dec 31, 2013	Estimated Cost at Completion	3,253,755.42
	Total Budget:	4,900,000.00
	Variance (Budget minus E\$AC):	1,646,244.58

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

Other Measures

Project Name	Monitoring the Future Web Programming and Survey Pilot (MTF-WPSP Year 2)				
Project Mode	Primary: Web	Secondary: Mail	Total of Modes: 2		
Project Type	Sponsored Projects		Project Status	Current	
Budget	Direct Budget:	168,852.00	Indirect Budget:	93,713.00	Total Budget: 262,564.00
Principal Investigator/Client	Megan Patrick (UM-SRC)				

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

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

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

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

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

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

Project Period	08/2012 - 08/2015	Proposal No:	12-0003R04
Data Collection	04/2014 - 08/2014		

Milestone Dates	PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
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Other Project Team Members	Gina-Qian Yang Cheung, Donnalee Grey-Farquharson, Hueichun Peng, Andrew Piskorowski, Aaron Pearson, Max Malhotra, Lloyd Hemingway
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Report Period	Jan, 2014 (MTF-WPSP Year 2)	Project Phase	Implementing
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Risk Level	Not Rated
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Monthly Update	<p>The fixes from testing have been tested and we will be meeting with study staff for sign-off on these fixes. 2014 updates to the survey have been received and will be programmed after the sign-off is complete. We are gearing up to go through a second round of in-depth tests in February. 2014 after all updates have been done and tested internally.</p>
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On Jan. 14 we trained four Survey Techs for MTF Web Winter Location alongside staff assigned to the main MTF Winter Location project. We assigned four staff to the Web project to allow for coverage during almost all hours of operation in the SSL. However, because the amount of sample generated for Web Location calling was significantly less than projected (204 lines vs. an anticipated 300), we soon had to move two of these callers exclusively to the main project due to lack of work. As of January 30, there have been 210 lines released, and 74% have been completed--39 found, 113 lost, 3 refusals, and 1 ineligible.

Special Issues

Cost	Total Cost to Date (Direct + Indirect):	86,825.57
Dec 31, 2013	Estimated Cost at Completion	183,628.96
	Total Budget:	262,564.00
	Variance (Budget minus E\$AC):	78,935.04

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

Other Measures

Project Name	National Survey of Family Growth (NSFG 2010-2020)			
Project Mode	Primary: Face to Face	Total of Modes: 1		
Project Type	Sponsored Projects	Project Status	Current	
Budget	Direct Budget: 29,713,370.00	Indirect Budget: 10,439,833.00	Total Budget:	40,153,203.00
Principal Investigator/Client	William Mosher (NCHS) Mick Couper (ISR)			
Project Team	Project Lead: Heidi Marie Guyer 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:	<p>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.</p>
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Project Period 09/2010 - 07/2020
Data Collection 09/2011 - 09/2019

Proposal No:

Milestone Dates

PreProduction Start:03/01/2011

Pretest End:

Staffing Completed:08/17/2011

SS Train Start:09/15/2011

DC Start:09/20/2011

Pretest Start:

Recruitment Start:06/01/2011

GIT Start:09/13/2011

SS Train End:09/19/2011

DC End:07/01/2019

Other Project Team Members

Chrissy Evanchek--Budget Analyst, Dan Tomlin--Project Support, Maureen O'Brien--Project Manager

Report Period

Jan, 2014 (NSFG 2010-2020)

Project Phase

Implementing

Risk Level

Not Rated

Monthly Update

In this reporting period, data collection continued for Year 3 (Quarter 10). The experimental work on model-based listing reduction (not listing in some segments for the next quarter) was put on hold for Quarter 10 but will be in place in Quarter 11. We continue our feasibility testing of data entry of interview observations on a smart phone application. After struggling with low eligibility in Quarters 7 and 8, eligibility in Quarter 9 resumed to a normal level (52%), yet it slipped to 48% in Quarter 10 (week 4). 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. Quarter 9 was the first quarter of the incentive experiment and the results were promising- response rates were higher and calls per case were lower in the \$60 group compared to the \$40 group.

Special Issues

We have loaded the full contract budget into the CRS (instead of only Cycle 8). We currently show an overrun in the CRS until we can work on projection edits for Cycles 9 and 10 to get the budget back in-line. Contract modification 7 raised the contract amount by \$95,037 to fund the incentive experiment (this modification has now been processed). Modification 8 provided additional funding to the contract. Modification 9 changed the field director to Heidi Guyer and will also provides further details (flexibility) for data destruction at the end of the contract.

Cost

Jan 31, 2014

Total Cost to Date (Direct + Indirect): 11,811,896.13

Estimated Cost at Completion 40,153,203.00

Total Budget: 40,153,203.00

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:	332	30.2%	10.3
Estimate at Complete:	1300	75%	9.8
Variance:	0	0	.7

Other Measures

Project Name Panel Study of Income Dynamics 2013 (Family Economics Study) (PSID 2013)

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

Project Type Sponsored Projects **Project Status** Current

Budget **Direct Budget:** 3,238,350.00 **Indirect Budget:** 1,797,280.00 **Total Budget:** 5,035,630.00

Principal Investigator/Client Charles Brown (Director) (ISR-SRC)
Vicki Freedman & Narayan Sastry (Associate Dirs) (ISR-SRC)
Katherine McGonagle (Assistant Dir) (ISR-SRC)

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: 12/31/2013

Other Project Team Members

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

Report Period Jan, 2014 (PSID 2013) **Project Phase** Closing

Risk Level On Track

Monthly Update PSID 2013 production concluded on December 31st! A total of 9,107 interviews were completed for a response rate of 92.1%. The final week of production was unexpectedly strong. The reasons aren't entirely clear but the Winter postcard may have played a role. Also, the increasing proportion of households that use primarily or exclusively cell phones seems to have led to more Rs having iwers' UM numbers (from caller ID) and contacting them directly in the final days of the production period.

January work (to-date) included:

- Final disposition coding (and decision to code out very late-generated Splitoffs as NI)
- Evaluation of final production outcomes
- Field Debriefing conference call
- Special analysis work on production questions (e.g. iw length Field vs. SSL, relationship of DRI to of Occ/Ind data quality, impact cell phones on contactability), etc.
- On-going Budget Monitoring including reassessment of future projections
- Final data deliverables (Blaise and STrak data sets)
- On-going coding with target 2/28 completion date

Special Issues

Cost	
Jan 31, 2014	
Total Cost to Date (Direct + Indirect):	4,847,211.24
Estimated Cost at Completion	5,016,542.33
Total Budget:	5,035,630.00
Variance (Budget minus E\$AC):	19,086.67

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

Other Measures

Note: HPI is Cumulative Production HPI.

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

Project Name	Social Relations, Aging and Health: Competing Theories and Emerging Complexities, Wave 3 (SRS W3)				
Project Mode	Primary: Telephone		Secondary: Web	Total of Modes: 2	
Project Type	Sponsored Projects			Project Status	Current
Budget	Direct Budget:	950,999.00	Indirect Budget:	527,805.00	Total Budget: 1,478,804.00
Principal Investigator/Client	Toni Antonucci (SRC) Kira Birditt (SRC)				
Project Team	Project Lead: Esther H Ullman Budget Analyst: Bethany Benton Production Manager: Joseph Matthew Matuzak Senior Project Advisor: Kirsten Haakan Alcser Production Manager: Maryam N Buageila Production Manager:				
Description:	SRO's work on this project will include the conduct of centralized telephone interviews with panel respondents and identified members of their 'core network'. After completing their centralized telephone interview, all respondents (both panel respondents and core network members) will be asked to complete monthly web-based journals for twelve months to demonstrate instances where they have relied on their “core network” to assist in dealing with life course events that they have faced, or in the case of core network members (CNMs) instances where they have provided support to the panel respondents in dealing with life course events that they have faced. The sample for the panel respondents will include the surviving members of the 1993 adult and child Social Relations cohorts (panel).				
Project Period	01/2014 - 01/2017			Proposal No:	SRO #13-0020
Data Collection					
Milestone Dates	<div><div>PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:</div><div>Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:</div></div>				
	<div>Charter: Kick-off: Training: Main Data Collection- SSL: Journal Data Collection:</div>				
Other Project Team Members	Rebecca Loomis, Dave Dybicki, Dan Zahs, Hueichun Peng, Max Malhorta, Minako Edgar, Robert Fenton, Shaowei Sun				
Report Period	Jan, 2014 (SRS W3)		Project Phase	Initiation	
Risk Level	Not Rated				
Monthly Update	The Project team was assembled. The Charter was written and approved. A kick-off meeting was held with the team and the P.I. staff attended. The budget is being entered into CRS. A Project review is scheduled for mid-February				
Special Issues	The budget will require about a 20% reduction, the first year funds came with the reduction. It is a smoothed 5 year budget so "over-runs" may appear for the first year as pre-production activities get underway.				

Cost	Total Cost to Date (Direct + Indirect):	0.00
Jan 31, 2014	Estimated Cost at Completion	0.00
	Total Budget:	1,478,804.00
	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	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 Matuzak
	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 End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
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Other Project Team Members	Dave Dybicki Pamela Swanson Bonnie C Andree Ann Munster
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Report Period	Jan, 2014 (SCA 2013)	Project Phase	Implementing
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Risk Level	Not Rated
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Monthly Update	No update on January activities.
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Special Issues	
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Cost	Total Cost to Date (Direct + Indirect):	0.00
Feb 28, 2014	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

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 Sustainability 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 End: 09/12/2012 Staffing Completed: SS Train Start: DC Start: 11/04/2013	Pretest Start: 09/04/2012 Recruitment Start: GIT Start: SS Train End: DC End: 12/23/2013
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Other Project Team Members Dave Dybicki & Meredith House providing Illume programming support.
Becky Loomis providing some administrative assistance.
Heather Schroeder providing weighting and data prep-to-analysis.

Report Period	Jan, 2014 (SCIP)	Project Phase	Initiation
Risk Level	Not Rated		
Monthly Update	No update on January activities.		
Special Issues			

Cost	Total Cost to Date (Direct + Indirect):	0.00
Feb 28, 2014	Estimated Cost at Completion	0.00
	Total Budget:	426,980.00
	Variance (Budget minus E\$AC):	0.00

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

Other Measures

Project Name	The Role of Housing in Healthy Child Development (H&C)			
Project Mode	Primary: Face to Face Total of Modes: 1			
Project Type	Sponsored Projects		Project Status	Current
Budget	Direct Budget:	543,892.00	Indirect Budget:	81,584.00 Total Budget: 625,476.00
Principal Investigator/Client	Dan Keating (University of Michigan) Sandra Newman (Johns Hopkins University) Tama Leventhal (Tufts University)			
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	09/2014 - 03/2016		

Milestone Dates

PreProduction Start: 07/01/2013	Pretest Start: 04/09/2014
Pretest End: 04/30/2014	Recruitment Start: 03/03/2014
Staffing Completed: 07/18/2014	GIT Start:
SS Train Start:	SS Train End:
DC Start:	DC End:

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

Report Period	Jan, 2014 (H&C)	Project Phase	Implementing
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Risk Level	Attention!
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Monthly Update

During January 2013, SRO activities included the following:

Task 1: Management, Budget and Work Plan

- Held one weekly project management meeting with the research team to discuss the project schedule, requirements for final sign off on questionnaire modules, screening procedures, adult questionnaire specification, procedures development, and IRB plan.

- Delivered updated project schedule, list of deadlines and near-term deliverables for the research team.

- Delivered monthly activity reports for the period September – December 2013.

- Budget/Contracts/Cost Estimate:

- o Communicated with JHU grants and contracts specialists regarding outstanding awards.

- o Revised budget estimates at the request of JHU and submitted to SRO for review/approval.

- o Prepared cost estimate for “thin slice” behavior coding training and submitted to the research team.

- o Updated staffing estimates and began preparation of pretest cost estimate.

- Prepared for the pretest IRB submission:

- o Consulted with the SRC IRB specialist regarding changes in the data collection protocol and best options for presenting questionnaire and protocol changes in an amendment.

- o Revised consent forms and other documents for PI review, in preparation for an IRB submission.

- o Developed a module-by-module comparison document for the IRB to outline questionnaire changes.

Task 2: Sampling

- No activity

Task 3: Questionnaire and Protocol Development/Pretest

- Incorporated last-minute adult questionnaire specification changes at the request of the research team and submitted for review. Updated and delivered the household roster section of the adult instrument. Delivered an updated concatenated adult Questionnaire and all December 16, 2013-approved project documentation to the research team.

- Continued work on a detailed comparison of the Dec 2013 finalized adult questionnaire with the existing, programmed questionnaire from 2012, in order to assess the ability to re-use 2012 programmed code.

- Communicated with researchers from the University of Toronto regarding development of “thin slice” behavior coding as a replacement for the Q-Sort in the child data collection protocol. Arranged training dates for protocol training, updated and delivered building block instructions to research team.

- Issued RFQs for the noise meter, time stamper, and other data collection supplies.

- Began development of RFQ for child time diary printing and scanning.

- Delivered a list of data products with detail on file formats. Held discussion with research team and began to incorporate modifications based on feedback.

Task 4: CAI Programming

- Began programming the adult questionnaire, post-interview observations and child session.

- Set up CTT for internal-testing. Began development of scenarios for testing. Began development of detailed testing plan and assignments.

- Established secure FTP file folders for data delivery.

Task 5: Systems Programming

- Began revisions to SurveyTrak specifications

- Began revisions to preload specifications (data that is passed between data collection programs)

Task 6: Recruitment & Hiring

- Finalized recruitment timeline

- Communicated with Detroit interviewers regarding pretest training and interviewing timeline.

Task 7: Training

- Continued work to develop the detailed pretest training agenda.

Task 8: Main Data Collection

Task 9: Post Collection Processing

Task 10: Weighting

Task 11: Final Data Deliverables

Cost information: H&C subcontract funded by the MacArthur Foundation authorized through 2/28/2014.

Total survey funding available:	\$	625,476
Invoiced Expenses for Dec 2013:	\$	54,272
Estimated Total Expended to Date	\$	316,119
Expected cost to complete:	\$	625,476
Variance:	\$	0

Cost explanation:

The cost estimated reflects total survey funding available and awarded to Michigan, current expenditures, and estimated expenses to the end of the award. The estimates represent an expectation that Michigan will work to the end of the award amount or period, whichever comes first. The final work scope has not been defined, and costs are estimated only to the end of the current subcontract.

Special Issues

Special issues

SRO has received a no-cost time extension for the current award, but has not received awards that would allow continued operations into March 2014.

The project does not appear to have the funding available to launch the scope that is being requested.

Other areas of high risk:

There is a high level of schedule risk due to IRB concerns. The research team has undertaken major revisions to all consent forms less than two weeks prior to the IRB submission deadline, and is not accepting SRO's advice on acceptable consent language. We have undertaken repeated rounds of consent revisions. Thus it will be extremely difficult for the SRO team to prepare all materials for the Michigan IRB deadline given these continued exchanges on document language.

The extent of the revisions that are being made, combined with the extensive changes to the adult questionnaire will almost certainly trigger a full-board review of the protocol. This will leave only a few weeks between the full-board review and the start of pretest production. Extensive negotiations with the IRB regarding language or contingencies will result in delays to the start of the pretest.

Against the repeated advice of SRO, the PI at JHU declined to submit any IRB modifications that would enable the project to seek a Certificate of Confidentiality. The UM IRB may not allow SRO to pretest without having a Certificate of Confidentiality in place. This was discussed with the PI in early October, 2013 and again on December 6, 2013 with a request to seek JHU approval of the Michigan consent form.

The PI has expressed reluctance to ask the JHU IRB for a deferral to Michigan for data collection. In addition, it does not appear that the PI has begun preparation of an IRB modification at JHU. This is another risk to the start of the pretest, assuming that SRO needs JHU approval to begin pretest interviewing.

Other areas of schedule risk: the PI is responsible for providing funding to Northwestern University for creation of dried blood spot supplies. We have issued notifications of this requirement on at least a monthly basis starting in September or October of 2013, and most recently delivered a list of requirements in mid-January 2014. The PIs are responsible for purchase of Woodcock-Johnson easels for the interviewers to use. We have issued notifications of this requirement on at least a monthly basis starting in September or October of 2013, and most recently delivered a list of requirements in mid-January 2014. Notifications to the PI have been both verbal and in writing.

Total funding for the project is unknown, as is the final work scope. The PIs have repeatedly refused to discuss the project budget or funding and continue to request further budget estimates. The project team is moving forward based on the preliminary, 9.5 million work scope provided by the research team, and used to establish the ballpark budget (13-00071). We are incorporating additional work scope changes on an ongoing basis. Financial risk exists that work is being done on scope that will eventually be cut. Delays in the project schedule lead to increased project cost. Requested questionnaire consultation and specification work continues to exceed assumptions used to prepare budgets, as does project management cost.

Cost
Dec 31, 2013

Total Cost to Date (Direct + Indirect):	321,759.94
Estimated Cost at Completion	625,476.00
Total Budget:	625,476.00
Variance (Budget minus E\$AC):	303,716.06

Measures

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

Other Measures

Project Name	Transition to Adulthood (2013) (TA 2013)				
Project Mode	Primary: Telephone Total of Modes: 1				
Project Type	Sponsored Projects		Project Status	Current	
Budget	Direct Budget:	441,640.00	Indirect Budget:	245,109.00	Total Budget: 686,749.00

Principal Investigator/Client Narayan Sastry (SRC)
Kate McGonagle (SRC)

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
Data Collection 10/2013 - 04/2014

Proposal No:

Milestone Dates

PreProduction Start:07/01/2013

Pretest End:

Staffing Completed:08/28/2013

SS Train Start:09/20/2013

DC Start:10/01/2013

Pretest Start:

Recruitment Start:08/01/2013

GIT Start:09/17/2013

SS Train End:09/21/2013

DC End:04/30/2014

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

Report Period Jan, 2014 (TA 2013) **Project Phase** Implementing

Risk Level Some Concerns

Monthly Update Last sample release: total 2013 TA sample was depended on PSID interviews - PSID completed on 12/31 and TA received final 93 cases for the total TA sample of 2150.

Progress: To achieve 92% RR we need 1899 interviews. We are currently at 66.6% and need additional 504 in 13 weeks.

Concerns: the "polar vortex" related to some loss of productivity and momentum ... in addition, we are now facing extremely low contact rate (dropped to 10% in week 17). Most of the sample has had limited contacts - average attempts are at 36 and max at 81.

Short-term solutions: moving lines out of tracking, focusing on lines that ever had contact, and changing SMS prioritization to increase PST contact attempts later in the day, following up on hard-to-reach letters, sending hard-to-reach emails, issuing appt reminder phone calls and emails, texting appt reminders, expanding shifts to work on weekends.

Long-term solutions: switching outgoing numbers (may help if passive resistance promotes no answer to the 734 number registered on cell phones), additional mailings (postcards), preparing for any end-game strategies.

Special Issues

Cost
Dec 31, 2013

Total Cost to Date (Direct + Indirect):	455,995.11
Estimated Cost at Completion	682,174.27
Total Budget:	686,749.00
Variance (Budget minus E\$AC):	4,570.73

Measures

	Units Complete	RR	HPI
<i>Current Goal:</i>	1410	68%	4.28
<i>Goal at Completion:</i>	1899	92%	5.00
<i>Current actual:</i>	1357	66%	4.05
<i>Estimate at Complete:</i>	1842	89%	5.35
<i>Variance:</i>	-57	3%	-0.35

Other Measures