

Survey Research Operations

Monthly Project Report

Sponsored Projects

June 2014



Sponsored Projects

(Army STARRS) *Army Study to Assess Risk and Resilience in Servicemembers*
 (COGUSA 6_7) *Assessing and Improving Cognitive Measures in the HRS*
 (BAM) *Becoming A Man*
 (CogEcon2013 Web/Mail Study) *Cognitive Economics 2013*
 (MRRS III) *Effects of Recession and Economic Stimulus in Southeast Michigan Wave III*
 (DUST II 2013) *Health and Daily Life*
 (HRS 2014) *Health and Retirement Study 2014*
 (CogVal) *HRS Cognitive Diagnosis Validation Study*
 (HRS CAMS13) *HRS Consumption and Activity Study*
 (HRS HCNS) *HRS Health and Nutrition Mail Study*
 (HRS Screening Initiatives) *HRS Screening Initiatives*
 (MILES) *MILES Lupus Study*
 (MTF BY 2014) *Monitoring the Future 2014 Base Year*
 (MTF-WPSP Year 2) *Monitoring the Future Web Programming and Survey Pilot*
 (NSFG 2010-2020) *National Survey of Family Growth*
 (PSID 2013) *Panel Study of Income Dynamics 2013 (Family Economics Study)*
 (PSID-CE (aka FES-CE)) *Panel Study of Income Dynamics Childhood Experiences Web/Mail Project*
 (SRS W3) *Social Relations, Aging and Health: Competing Theories and Emerging Complexities, Wave 3*
 (SCA 2014) *Surveys of Consumer Attitudes*
 (SCIP) *Sustainability Cultural Indicators Project*
 (H&C) *The Role of Housing in Healthy Child Development*
 (TA 2013) *Transition to Adulthood (2013)*
 (CDS 2014) *Transitions from Preschool through High School: Family, Schools and Neighborhoods*
 (WHO-MDS) *World Health Organization Model Disability Survey*

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

Project Mode Primary: Class SAQ Secondary: Mixed Total of Modes: 8

Project Type Sponsored Projects **Project Status** Current

Budget **Direct Budget:** 25,662,847.00 **Indirect Budget:** 6,656,304.00 **Total Budget:** 32,319,151.00

Principal Investigator/Client Steve Heeringa (University of Michigan)

Funding Agency

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

Project Team **Project Lead:** Nancy J Gebler
Budget Analyst: William Lokers
Production Manager: Ruth B Philippou
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, the University of California-San Diego, and the National Institute of Mental Health will conduct an epidemiologic study of mental health, psychological resilience, suicide risk, suicide-related behaviors, and suicide deaths in the Army. The study will evaluate representative samples of Soldiers across all phases of Army service, both retrospectively and prospectively. Army STARRS is not a single study, but rather an integrated design of seven epidemiologic and neurobiologic studies: All Army Study (AAS), New Soldier Study (NSS), Historical Administrative Data Study (HADS), Pre-Post Deployment Study (PPDS), Clinical Reappraisal Study (CRS), and two Soldier Health Outcomes Studies (SHOS-A and SHOS-B).

Project Period 07/2009 - 06/2015 **Proposal No:** 09-0046, and multipl

Data Collection Period 01/2011 - 04/2014

Security Plan Yes

Milestone Dates

PreProduction Start: 07/01/2009

Pretest End:

Staffing Completed:

SS Train Start:

DC Start:

Pretest Start:

Recruitment Start:

GIT Start:

SS Train End:

DC End: 04/30/2014

Other Project Team Members Lead Team: Lisa Holland, Lisa Lewandowski-Romps, Lisa Wood, ZoAnne Blackburn, Theresa Short, Andrew Hupp, Margaret Hudson, Kathy LaDronka, Bill Lokers, Andrew Piskowrowski, Kyle Kwaiser, Ryan Yoder, Ruth Phillippou, Lisa Carn, Nancy Gebler

Other Project Names

Report Period June, 2014 (Army STARRS) **Project Phase** Implementing

Risk Level On Track

Monthly Update

1. Finance:
 - a. We updated cost projections for June, and reviewed Year 6 cost projections.
 - b. The Monthly PI report was distributed 24 June (attached)
 - c. We are working to close down accounts that will no longer be used in Year 5 and open up a new DDIA (Design, Development, Implementation and Analysis) account for Year 6.
2. STARRS2:
 - a. We received word that funding is still being pursued (and "looking bright"), current estimate is that pre-production will start June or July 2015.
 - b. No news on scope or available budget for data collection.
3. Staffing:
 - a. Team members who are transitioning off the project in June have been asked to complete the appropriate project termination checklist (it varies depending on type of background check and role on the project).
 - b. Some staff who are leaving the project have Army STARRS laptop issued for home office or other work-related use. We plan to either transfer those laptops to DCO, or have the employee turn in their Army STARRS laptop and check a different one out from DCO. We want to keep our records "clean" (i.e., all laptops still in Army STARRS inventory limited to project use).

4. Data Management:
 - a. We are working to finish all survey data loading by 30 June, are on track for the most part (a few issues continue to arise that require investigation, but no serious setbacks so far)
 - b. We continue to load Quarter 12 Army/DoD data. Data will be requested on a quarterly basis, but the data will be stored and not processed or loaded into the enclave in Year 6.
 - c. The integrated AAS/PPDS dataset has been loaded into the enclave, and is ready for users.
 - d. Biomarker data requests continue, as new assays are being planned.
 - e. There will be some data management work in Year 6, we will work with the research team to define the scope and priority, since that effort will take away from time spent on analysis activities.
5. Analysis:
 - a. We are creating a longitudinal sample control file for PPDS (result codes across the four waves of data collection) to facilitate analysis
 - b. We are working on assigning the statistical and data management staff into four groups:
 - i. PPDS group: Psychiatric epidemiology (Steve)
 - ii. AAS/PTSD group: Suicide (replication of Harvard's work and risk modeling) (Lisa LR)
 - iii. Biomarker group: genetic analyses & integration with psychiatric epidemiology analyses (Colter)
 - iv. Methods group: methodological analyses of paradata, survey data (James)
6. Enclave:
 - a. On schedule for July 2 increase in capacity (to 9TB), we are closely monitoring available space
 - b. We have funding to support the enclave through Year 6 (June 2015), are starting to work with the PI's and the Army to plan for enclave support and approval to retain Army data beyond 2015.
 - c. Drop box activity continues to be heavy. We expect this to be the case through Year 6 as the focus turns from data collection to data analysis.
7. Security:
 - a. Theresa is training ZoAnne in security procedures this month as 30 June is Theresa's last day at SRO.
8. Archiving and project documentation:
 - a. Jas is assisting with technical documentation for the month of June.
 - b. Barb Ward is putting together a piece on laptop procurement and setup.
 - c. Margaret is finishing up field methods reports (AAS, NSS, PPDS, SHOS-B)
 - d. Kathy and Charlotte are finishing up SRO/DCO documentation.
 - e. Lisa H. is finishing up draft of CRS (CCS) documentation
 - f. SHOS-A will be primarily technical documentation (Jas)
 - g. ZoAnne continues to work on selecting and copying files into the archive structure.
 - h. Kelly is putting finishing touches on file archiving.
 - i. Andrew Hupp is putting finishing touches on PPDS Time 3 technical documentation and will coordinate a follow-up debriefing with selected SSL and other project staff to make sure lessons learned and ideas for STARRS2 are captured while they are fresh.
 - j. Jas is coordinating a debriefing to capture lessons learned on technical system development.
 - k. Nancy will take over any remaining documentation as of July 1 and finish it up in Year 6.
9. Public use dataset: Progressing on our end, waiting for Army to respond to request for decision on level of restricted access. Integrated datasets have been delivered to ICPSR for AAS and NSS. Final QC is completed.
10. Upcoming Meetings:
 - a. Interim Progress Review (IPR) with the Army: date TBD, expected in early September
11. Other:
 - a. Nancy wrote an article on Army STARRS for an upcoming Happening in SRO newsletter
 - b. Steve and James have been asked to meet with the UM IRB board 19 June to provide a final report of activities. (slides attached)
 - c. As the project winds down, the PI meetings have been reduced to twice/month (they were being held weekly); and Steering Committee meetings once/month (they were twice/month). We continue to meet with NIMH/ODUSA and the PI's weekly (those meetings are usually very brief).
12. Related projects:
 - a. Workplace Violence Grant: No change, work continues.
13. Attachments for June's activities:
 - a. Slides for UM IRB briefing
 - b. Monthly PI report
 - c. Quarter progress report

Special Issues

None

**Cost
Jun 19, 2014**

| | |
|--|---------------|
| Total Cost to Date (Direct + Indirect): | 29,504,740.00 |
| Estimated Cost at Completion (E\$AC): | 31,409,089.00 |
| Total Budget: | 32,319,151.00 |
| Variance (Budget minus E\$AC): | 910,061.00 |
| Reason For Variance: | |

Fewer staff hours have been charged than were projected. we have been asked to return unused funds to our research partners, which have been reallocated for Year 6.

Projections
Jun 19, 2014

Dollars Projected For Month: 315,242.00
Actual Dollars Used: 300,394.00
Variance (Projected minus Actual): 14,847.00
Reason For Variance: Fewer staff hours were charged than projected. We also had some equipment purchases which resulted in lower indirect cost charges.

Measures

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

Other Measures

Data collection on all components is complete.

| | | | | | |
|--|---|------------------------------------|---------------------------------|--|---|
| Project Name | Assessing and Improving Cognitive Measures in the HRS (COGUSA 6_7) | | | | |
| Project Mode | Primary: Telephone | Secondary: Web | Total of Modes: 2 | | |
| Project Type | Sponsored Projects | Project Status | Current | | |
| Budget | Direct Budget: 391,530.00 | Indirect Budget: 213,384.00 | Total Budget: 604,914.00 | | |
| Principal Investigator/Client | Robert Willis (University of Michigan) Jack McArdle (University of Southern California) Gwen Fisher (Colorado State University) | | | | |
| Funding Agency | Subcontract from University of Southern California. USC funder is National Institutes on Aging. | | | | |
| IRB | HUM#: HUM00001406 | Period Of Approval: | 4/1/2014-4/1/2014 | | |
| 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 Period | 02/2014 - 07/2014 | | | | |
| Security Plan | Yes | | | | |
| Milestone Dates | <table border="1"> <tr> <td> PreProduction Start: Pretest End: Staffing Completed: SS Train Start:02/13/2014 DC Start:02/20/2014 </td> <td> Pretest Start: Recruitment Start: GIT Start: SS Train End:02/13/2014 DC End:07/31/2014 </td> </tr> </table> | | | 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 |
| 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 | | | | |
| Other Project Names | CogUSA2014 | | | | |
| Report Period | June, 2014 (COGUSA 6_7) | Project Phase | Implementing | | |
| Risk Level | On Track | | | | |
| Monthly Update | Workable sample is down to a small amount. Lisa adjusted staffing levels in the SSL appropriately. After discussion with PI, we came up with an end game plan that is very much like what was done for Waves 4/5. SSL TIs will call all web cases that have been started, but not completed to see if the respondent needs any assistance and ask them to complete iw. All Wave 6 web cases that have a phone number will be transferred to SSL for interviewing. Hard to Reach persuasion letters will be sent. In July, we will send final persuasion letters to all remaining sample and plan to close interviewing at the end of the month. | | | | |
| Special Issues | none | | | | |
| Cost May 31, 2014 | Total Cost to Date (Direct + Indirect): 478,413.24 Estimated Cost at Completion (E\$AC): 602,921.75 Total Budget: 604,914.00 Variance (Budget minus E\$AC): 1,992.25 Reason For Variance: Needed fewer interviewer hours than projected to cover telephone sample. | | | | |
| Projections May 31, 2014 | Dollars Projected For Month: 28,756.76 Actual Dollars Used: 19,678.76 Variance (Projected minus Actual): 9,078.00 Reason For Variance: Needed fewer interviewer hours than projected to cover telephone sample. | | | | |

Measures

| | Units Complete | RR | HPI |
|-------------------------------------|-----------------------|-----------|------------|
| <i>Current Goal:</i> | 1716 | 82% | 2.5 |
| <i>Goal at Completion:</i> | 1900 | 90% | 3.5 |
| <i>Current actual:</i> | 1716 | 82% | 1.8 |
| <i>Estimate at Complete:</i> | 1820 | 85% | 3.5 |
| <i>Variance:</i> | -80 | -5% | 0 |

Other Measures

Telephone: 946 Total; 568 W6; 378 W7. RR2: 83%
 Web: 770 Total; 404 W6; 366 W7. RR2: 82%

| | | | |
|--------------------------------------|--|------------------------------------|---------------------------------|
| Project Name | Becoming A Man (BAM) | | |
| Project Mode | Primary: Face to Face Total of Modes: 1 | | |
| Project Type | Sponsored Projects | Project Status | Current |
| Budget | Direct Budget: 692,972.00 | Indirect Budget: 107,028.00 | Total Budget: 800,000.00 |
| Principal Investigator/Client | Dr. Jens Ludwig (University of Chicago) | | |
| Funding Agency | | | |
| IRB | HUM#: 00086048 | Period Of Approval: | 4/4/2014-4/3/2015 |
| Project Team | Project Lead: Sarah Crane Budget Analyst: Dean E Stevens Production Manager: Sharon K Parker Senior Project Advisor: Nicole G Kirgis Production Manager: Veronica Connors-Burge Production Manager: | | |
| Description: | The purpose of this study is to complete in-person interviews with approximately 300 male students aged 12-18 from 12 pre-selected Chicago Public Schools. | | |
| Project Period | 02/2014 - 10/2014 | Proposal No: | 14-PAF03557/14-PAF |
| Data Collection Period | 05/2014 - 08/2014 | | 0 |
| Security Plan | No | | |
| Milestone Dates | <div style="border: 1px solid black; padding: 5px;"> <div style="display: flex; justify-content: space-between;"> <div> PreProduction Start:02/15/2014 Pretest End: Staffing Completed:03/07/2014 SS Train Start:04/26/2014 DC Start:05/01/2014 </div> <div> Pretest Start: Recruitment Start:02/28/2014 GIT Start:04/24/2014 SS Train End:04/28/2014 DC End:08/29/2014 </div> </div> </div> | | |
| Other Project Team Members | Brant Zhang SurveyTrak Holly Ackerman WebTrak Jim Hagerman CAI Brad Goodwin Data Manager Andrea Pierce Help Desk Hongyu Johnson Proj Assistant | | |
| Other Project Names | | | |
| Report Period | June, 2014 (BAM) | Project Phase | Implementing |
| Risk Level | On Track | | |
| Monthly Update | BAM production has remained strong, exceeding weekly goals for 5 out of the 7 weeks so far. | | |
| Special Issues | | | |
| Cost Jun 30, 2014 | Total Cost to Date (Direct + Indirect): 146,646.65 Estimated Cost at Completion (E\$AC): 953,011.54 Total Budget: 800,000.00 Variance (Budget minus E\$AC): -153,011.54 Reason For Variance: EAC is based on projections that include all 5 funding sources confirmed by client (University of Chicago). However, only 3 funding sources are in hand. | | |
| Projections Jun 30, 2014 | Dollars Projected For Month: 167,917.00 Actual Dollars Used: 170,290.00 Variance (Projected minus Actual): -2,373.00 Reason For Variance: Non-salary costs came in under what was projected, but salary items overran what was projected. | | |

Measures

| | Units Complete | RR | HPI |
|------------------------------|----------------|--------|-----|
| <i>Current Goal:</i> | 542 | 88-90% | 9 |
| <i>Goal at Completion:</i> | | | |
| <i>Current actual:</i> | 469 | 54% | 7.4 |
| <i>Estimate at Complete:</i> | | | |
| <i>Variance:</i> | | | |

Other Measures

| | | | | | | | | | | | | | |
|--------------------------------------|---|---|---------------------------------|-----------------------------|-----------------------|---------------------|---------------------------|----------------------------|-------------------|------------------------|----------------------|------------------|----------------|
| Project Name | Cognitive Economics 2013 (CogEcon2013 Web/Mail Study) | | | | | | | | | | | | |
| Project Mode | Primary: Mixed Total of Modes: 2 | | | | | | | | | | | | |
| Project Type | Sponsored Projects | Project Status | Current | | | | | | | | | | |
| Budget | Direct Budget: 87,247.00 | Indirect Budget: 47,550.00 | Total Budget: 134,797.00 | | | | | | | | | | |
| Principal Investigator/Client | Robert Willis (SRO) | | | | | | | | | | | | |
| Funding Agency | | | | | | | | | | | | | |
| IRB | HUM#: HUM00016894 | Period Of Approval: | 5/30/2013 - 5/29/14 | | | | | | | | | | |
| 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: | <p>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.</p> | | | | | | | | | | | | |
| Project Period | 06/2013 - 03/2014 | Proposal No: | SRO# 13-0040 | | | | | | | | | | |
| Data Collection Period | 09/2013 - 01/2014 | | | | | | | | | | | | |
| Security Plan | Yes | | | | | | | | | | | | |
| Milestone Dates | <table border="1"> <tr> <td>PreProduction Start:</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start:</td> </tr> <tr> <td>Staffing Completed:</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start:</td> <td>SS Train End:</td> </tr> <tr> <td>DC Start:</td> <td>DC End:</td> </tr> </table> | | | PreProduction Start: | Pretest Start: | Pretest End: | Recruitment Start: | Staffing Completed: | GIT Start: | SS Train Start: | SS Train End: | DC Start: | DC End: |
| PreProduction Start: | Pretest Start: | | | | | | | | | | | | |
| Pretest End: | Recruitment Start: | | | | | | | | | | | | |
| Staffing Completed: | GIT Start: | | | | | | | | | | | | |
| SS Train Start: | SS Train End: | | | | | | | | | | | | |
| DC Start: | DC End: | | | | | | | | | | | | |
| Other Project Team Members | Winter Freeman (Project Associate), Emily Blasczyk, Hueichun Peng, Maryam Buageila | | | | | | | | | | | | |
| Other Project Names | | | | | | | | | | | | | |
| Report Period | June, 2014 (CogEcon2013 Web/Mail Study) | Project Phase | Closing | | | | | | | | | | |
| Risk Level | On Track | | | | | | | | | | | | |
| Monthly Update | Client requested we try and find funds to return to parent for other work they need to do for analysis. We reduced projections for project and clarified with client this means no additional work expected on project and if they have requests we will need to discuss charging for that work. | | | | | | | | | | | | |
| Special Issues | | | | | | | | | | | | | |
| Cost | | | | | | | | | | | | | |
| Jun 30, 2014 | Total Cost to Date (Direct + Indirect): | 128,520.35 | | | | | | | | | | | |
| | Estimated Cost at Completion (E\$AC): | 133,989.65 | | | | | | | | | | | |
| | Total Budget: | 134,797.00 | | | | | | | | | | | |
| | Variance (Budget minus E\$AC): | 806.35 | | | | | | | | | | | |
| | Reason For Variance: | Client has requested we return funds if at all possible to allow for project work. We have stopped projections for any further work (but will charge if work requested) | | | | | | | | | | | |
| Projections | | | | | | | | | | | | | |
| Jun 30, 2014 | Dollars Projected For Month: | 0.00 | | | | | | | | | | | |
| | Actual Dollars Used: | 0.00 | | | | | | | | | | | |
| | Variance (Projected minus Actual): | 0.00 | | | | | | | | | | | |
| | Reason For Variance: | We still anticipate an underrun because we expect outstanding respondent checks will be voided soon- | | | | | | | | | | | |

Measures

| | Units Complete | RR | HPI |
|------------------------------|----------------|-----|-----|
| <i>Current Goal:</i> | 690 | 80% | |
| <i>Goal at Completion:</i> | 690 | 80% | |
| <i>Current actual:</i> | 693 | 81% | |
| <i>Estimate at Complete:</i> | 693 | 81% | |
| <i>Variance:</i> | | 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) | | | | | | | | | | | | |
| Funding Agency | MacArthur Foundation, Rockefeller Foundation, and UM Office of the Vice President for Research | | | | | | | | | | | | |
| IRB | HUM#: HUM00031622 | Period Of Approval: | 05/6/2015 | | | | | | | | | | |
| 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 Period | 06/2013 - 10/2013 | | | | | | | | | | | | |
| Security Plan | Yes | | | | | | | | | | | | |
| Milestone Dates | <table border="1"> <tr> <td>PreProduction Start:03/05/2013</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start:03/15/2013</td> </tr> <tr> <td>Staffing Completed:04/16/2013</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start:06/11/2013</td> <td>SS Train End:06/12/2013</td> </tr> <tr> <td>DC Start:06/17/2013</td> <td>DC End:10/31/2013</td> </tr> </table> | | | 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 |
| PreProduction Start: 03/05/2013 | Pretest Start: | | | | | | | | | | | | |
| Pretest End: | Recruitment Start: 03/15/2013 | | | | | | | | | | | | |
| Staffing Completed: 04/16/2013 | GIT Start: | | | | | | | | | | | | |
| SS Train Start: 06/11/2013 | SS Train End: 06/12/2013 | | | | | | | | | | | | |
| DC Start: 06/17/2013 | DC End: 10/31/2013 | | | | | | | | | | | | |
| Other Project Team Members | Jeff Smith - Tech Lead/STrak Programmer Jim Hagerman - Blaise Programmer Holly Ackerman - WebTrak/Weblog Programmer Data Manager - Jennie Williams Help Desk Supervisor - Genise Pattullo Help Desk Lead - Deb Wilson Instrument Testing - ZoAnne Blackburn Tech Specs/Project Assistant - Jeannie Baker | | | | | | | | | | | | |
| Other Project Names | Michigan Recession and Recovery Study | | | | | | | | | | | | |
| Report Period | June, 2014 (MRRS III) | Project Phase | Closing | | | | | | | | | | |
| Risk Level | On Track | | | | | | | | | | | | |
| Monthly Update | June activities have included previous wave imputations and weighting. Past wave imputations have been added to SRO workscope in order to complete the wave 3 weights. The PIs are transferring \$5,000 to SRO to cover this additional workscope. We are working on an account extension through August 2014 to allow time to finish the work on weights. | | | | | | | | | | | | |
| Special Issues | | | | | | | | | | | | | |
| Cost May 31, 2014 | Total Cost to Date (Direct + Indirect): 631,293.84 Estimated Cost at Completion (E\$AC): 640,648.85 Total Budget: 653,925.00 Variance (Budget minus E\$AC): 13,276.15 | | | | | | | | | | | | |

Reason For Variance:

In winter 2013, additional workscope was budgeted for the callback effort although SRO informed the PIs that the callbacks might be completed within the current under-run. The agreement was that the PIs would pay SRO costs incorporated over the original budget. We have monitored to the full budget but also to the amount SRO has received (\$636,280.91). This month PIs are transferring funds in the amount of \$5,000 to cover estimated costs to complete.

Projections
May 31, 2014

Dollars Projected For Month:

7,130.10

Actual Dollars Used:

5,961.84

Variance (Projected minus Actual):

4,748.75

Reason For Variance:

Some staff did not charge as many hours in May as had been projected. Hours have been pushed forward into June due to continued work on the weighing effort.

Measures

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

Other Measures

Project Name Health and Daily Life (DUST II 2013)

Project Mode Primary: Telephone Total of Modes: 1

Project Type Sponsored Projects **Project Status** Current

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

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

Funding Agency National Institutes of Health - National Institute on Aging

IRB ***HUM#:*** 00010551 ***Period Of Approval:*** 11/6/2013 - 11/5/

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

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

Project Period 01/2013 - 04/2017 **Proposal No:** 10-0055R06

Data Collection Period 06/2013 - 01/2014

Security Plan Yes

Milestone Dates

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

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

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

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

Risk Level On Track

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

us. In fact the number of never contacted lines has been cut by more than 50%; there are now fewer than 2.4% of the sample that has never been reached. Data collection was completed on February 17, 2014. Final data files were delivered to the PI on February 23. The primary project activities in March are activity coding and the survey director is preparing a final report for the PI. During this time period, March into April, revisions have been made to the final report, and, as noted above in "Reason for Variance", re-coding of some cases has been done in order to finalize the response rate calculations. For April - June, final work was done on the Household FPR to make sure it lined up with other calculations. In June, SRO attended a meeting to reconcile our final production counts and rates with those calculated by PSID Staff. Further reconciliation of RR calculations and further documentation of spawning rules was requested.

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. A total of 1,331 were completed at the time of the end of data collection.

**Cost
May 31, 2014**

| | |
|--|---|
| Total Cost to Date (Direct + Indirect): | 994,619.69 |
| Estimated Cost at Completion (E\$AC): | 996,345.15 |
| Total Budget: | 1,204,227.00 |
| Variance (Budget minus E\$AC): | 207,881.84 |
| Reason For Variance: | A larger than anticipated proportion of cases were found to be ineligible or could not be interviewed, due to them being non-English speaking, the need for a proxy interview, or physical limitations. |

**Projections
May 31, 2014**

| | |
|---|---|
| Dollars Projected For Month: | 6,042.21 |
| Actual Dollars Used: | 2,222.41 |
| Variance (Projected minus Actual): | 3,819.80 |
| Reason For Variance: | May work was limited to finalizing the project's final report. The amount of remaining work was dependent upon the PI's assessment of the draft report and subsequent requests for revision, so was difficult to project 100% accurately. |

Measures

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

Other Measures

| | | | | | | | | | | | | | |
|--|---|--------------------------------------|------------------------------------|--|----------------------------------|--------------------------------|---------------------------|----------------------------|------------------------------|-----------------------------------|---------------------------------|-----------------------------|---------------------------|
| Project Name | Health and Retirement Study 2014 (HRS 2014) | | | | | | | | | | | | |
| Project Mode | Primary: Mixed Total of Modes: 2 | | | | | | | | | | | | |
| Project Type | Sponsored Projects | Project Status | Current | | | | | | | | | | |
| Budget | Direct Budget: 12,565,944.00 | Indirect Budget: 4,523,742.00 | Total Budget: 17,089,686.00 | | | | | | | | | | |
| Principal Investigator/Client | David Weir (SRC) Mary Beth Ofstedal (SRC) Ken Langa (SRC) | | | | | | | | | | | | |
| Funding Agency | | | | | | | | | | | | | |
| IRB | HUM#: | Period Of Approval: | | | | | | | | | | | |
| Project Team | Project Lead: Nicole G Kirgis Budget Analyst: Richard Warren Krause Production Manager: Stephanie Sullivan Senior Project Advisor: Mary P Maher Production Manager: Rebecca Gatward Production Manager: Piotr Dworak | | | | | | | | | | | | |
| Description: | <p>The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort will be added. A series of physical measures and biomarkers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records and Veterans Administration (VA) records is requested. The HRS 2014 sample size is 23,029.</p> | | | | | | | | | | | | |
| Project Period | 01/2014 - 01/2015 | | Proposal No: | | | | | | | | | | |
| Data Collection Period | 02/2015 - 12/2014 | | | | | | | | | | | | |
| Security Plan | | | | | | | | | | | | | |
| Milestone Dates | <table border="1"> <tr> <td>PreProduction Start:06/01/2013</td> <td>Pretest Start:11/06/2013</td> </tr> <tr> <td>Pretest End:11/20/2013</td> <td>Recruitment Start:</td> </tr> <tr> <td>Staffing Completed:</td> <td>GIT Start:03/19/2014</td> </tr> <tr> <td>SS Train Start:02/24/2014</td> <td>SS Train End:02/26/2014</td> </tr> <tr> <td>DC Start:02/28/2014</td> <td>DC End:12/13/2014</td> </tr> </table> | | | PreProduction Start: 06/01/2013 | Pretest Start: 11/06/2013 | Pretest End: 11/20/2013 | Recruitment Start: | Staffing Completed: | GIT Start: 03/19/2014 | SS Train Start: 02/24/2014 | SS Train End: 02/26/2014 | DC Start: 02/28/2014 | DC End: 12/13/2014 |
| PreProduction Start: 06/01/2013 | Pretest Start: 11/06/2013 | | | | | | | | | | | | |
| Pretest End: 11/20/2013 | Recruitment Start: | | | | | | | | | | | | |
| Staffing Completed: | GIT Start: 03/19/2014 | | | | | | | | | | | | |
| SS Train Start: 02/24/2014 | SS Train End: 02/26/2014 | | | | | | | | | | | | |
| DC Start: 02/28/2014 | DC End: 12/13/2014 | | | | | | | | | | | | |
| Other Project Team Members | Jaime Koopman (Project Manager), Ian Ogden (Project Assistant), Heather Rejto (Project Assistant), | | | | | | | | | | | | |
| Other Project Names | | | | | | | | | | | | | |
| Report Period | June, 2014 (HRS 2014) | Project Phase | Implementing | | | | | | | | | | |
| Risk Level | On Track | | | | | | | | | | | | |
| Monthly Update | In June, data collection continued in both the field and SSL. Production continues to go well; yield is exceeding cumulative interview projections and HPI is lower than projected for this point in data collection. We are currently in our 17th week of production. Work in the SSL is winding down and cases are being transferred to the field on a flow basis. SSL data collection is expected to be closed out completely by mid July. | | | | | | | | | | | | |
| Special Issues | IRB approval came through on a modification to our field procedures in response to blood pressure readings in the hypertensive crisis range. While the trigger values remains the same, the revised procedures allow the respondent to decide whether he/she would like to continue with the interview (not require the interviewer to stop the interview). | | | | | | | | | | | | |
| Cost May 31, 2014 | Total Cost to Date (Direct + Indirect): 8,438,729.58 Estimated Cost at Completion (E\$AC): 17,513,593.78 Total Budget: 17,089,686.00 Variance (Budget minus E\$AC): 423,907.78 Reason For Variance: Adjustments were made in May to refine interviewer hour projections, which led to a projected overrun. We are in the process of refining projections to bring the projected amount in line with the budget, re-evaluating field projections and non-salary projections. | | | | | | | | | | | | |

Projections
May 31, 2014

Dollars Projected For Month: 2,669,448.05

Actual Dollars Used: 1,939,438.08

Variance (Projected minus Actual): 730,010.00

Reason For Variance: Costs in May came in under projections by a substantial amount. Salary costs were under overall and several non-salary categories came in under as well. We are looking closely at these categories as we try to refine projections moving forward to get the currently projected overrun in balance with the budget.

Measures

| | Units Complete | RR | HPI |
|------------------------------|------------------|-------|------|
| Current Goal: | 20,381 | 88.5% | 7.4 |
| Goal at Completion: | 20,381 | 88.5% | 7.4 |
| Current actual: | 12,773 (6/29/14) | 55% | 5.79 |
| Estimate at Complete: | 20,381 | 88.5% | 7.4 |
| Variance: | 0 | 0 | 0 |

Other Measures

Physical Measures consent 97, Saliva consent 67, Blood consent 92

| | | | | | |
|--|--|----------------------------------|--------------------------------|--|---|
| Project Name | HRS Cognitive Diagnosis Validation Study (CogVal) | | | | |
| Project Mode | Primary: Face to Face Total of Modes: 1 | | | | |
| Project Type | Sponsored Projects | Project Status | Current | | |
| Budget | Direct Budget: 23,075.00 | Indirect Budget: 8,306.00 | Total Budget: 31,381.00 | | |
| Principal Investigator/Client | David Weir (ISR) Mary Beth Ofstedal (ISR) Ken Langa (ISR) | | | | |
| Funding Agency | | | | | |
| IRB | HUM#: | Period Of Approval: | | | |
| Project Team | Project Lead: Evanthia Leissou Budget Analyst: Richard Warren Krause Production Manager: Kathleen S Ladronka Senior Project Advisor: Mary P Maher Production Manager: Production Manager: | | | | |
| Description: | For this project a sample of 20 main subjects and 20 family informants of those main subjects will be interviewed in person. The goal will be to complete interviews with 3 main sample members who have normal cognitive function (as determined by Michigan Alzheimer's Disease Center [MADC] information), 4 with mild cognitive impairment, and 3 with dementia, as well as to interview a family informant of each of the main sample members. SRO will administer a one-hour cognitive assessment to the main subjects and a 15 minute proxy assessment to the family informants. Both of those interview types will be completed with a Blaise instrument. In addition, SRO will obtain feedback from respondents regarding their experiences with the assessments via a brief paper and pencil interview. | | | | |
| Project Period | 01/2014 - 06/2014 | Proposal No: | 13-0082R02 | | |
| Data Collection Period | 04/2014 - 05/2014 | | | | |
| Security Plan | | | | | |
| Milestone Dates | <table border="1"> <tr> <td> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table> | | | PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: | Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: |
| PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: | Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: | | | | |
| Other Project Team Members | The team will be comprised of a survey director, production manager, two field interviewers, a Blaise programmer, help desk supervisor, help desk specialist, application programming supervisor, data ops research associate, office assistant, and a SPA. | | | | |
| Other Project Names | | | | | |
| Report Period | June, 2014 (CogVal) | Project Phase | Initiation | | |
| Risk Level | Some Concerns | | | | |
| Monthly Update | <p>Production interviewing has not started for this project due to a delay in receiving the license for one of the tests administered in the interview. The license was received on May 10th, but by that time the research team was exploring the idea of increasing the sample size and perform data analysis for use in a proposal due in November. Discussions between the PI (Ken Langa) and Michigan Alzheimer's Disease Center (MADC) regarding the additional sample started on May 19th. The sample is anticipated to increase to about 60 primary respondents.</p> <p>In June the PI team decided to also add a new interview component(Raven's test), and started the process to receive permission to program the Raven's test. As of June 27, the material and license have not arrived. A new IRB amendment will be submitted by the co-PI to include the increased sample size, the data analysis plan, and the Raven's test protocol.</p> <p>A new schedule was prepared and the PIs agreed to it. The new schedule assumes data collection to start in early August and last for 6 weeks.</p> <p>To accommodate the increased sample, we estimate needing to staff 6 interviewers. Discussions started with SSL management, but may need to look for a field interviewer to cover interviews in Detroit. The increased sample will include respondents who live further away from the Ann Arbor area. MADC has two meeting sites, one in Detroit and one in Ann Arbor, which were offered for the interviews, but some coordination will be required with MADC staff.</p> <p>A new budget was prepared to estimate the effort to complete 60 interviews in two locations. Once material arrive for the Raven's test (new lw component) we will have additional information about the length of the new test and we will</p> | | | | |

modify the budget (increase HPI).

Special Issues

Delay in production start due to IRB approval and interview material. New work scope was added--increased interviews from 10 to 60, a new test will be included in the interview, and respondents will be interviewed in two locations, Ann Arbor and Detroit.

Cost

Jun 30, 2014

| | |
|--|-----------|
| Total Cost to Date (Direct + Indirect): | 26,001.24 |
| Estimated Cost at Completion (E\$AC): | 29,153.38 |
| Total Budget: | 31,381.00 |
| Variance (Budget minus E\$AC): | 2,227.62 |
| Reason For Variance: | |

Projections

Jun 30, 2014

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

Measures

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

Other Measures

| | | | | | | | | | | | | | |
|--|--|---|---------------------------------|--|-----------------------|---------------------|---------------------------|----------------------------|-------------------|------------------------|----------------------|------------------|----------------|
| Project Name | HRS Consumption and Activity Study (HRS CAMS13) | | | | | | | | | | | | |
| Project Mode | Primary: Mail Total of Modes: 1 | | | | | | | | | | | | |
| Project Type | Sponsored Projects | Project Status | Current | | | | | | | | | | |
| Budget | Direct Budget: 336,960.00 | Indirect Budget: 121,307.00 | Total Budget: 458,267.00 | | | | | | | | | | |
| Principal Investigator/Client | David Weir (SRC) Mary Beth Ofstedal (SRC) Michael Hurd (RAND) | | | | | | | | | | | | |
| Funding Agency | National Institutes of Health | | | | | | | | | | | | |
| IRB | HUM#: HUM00079949 | Period Of Approval: | 9/27/13 - 9/26/14 | | | | | | | | | | |
| Project Team | Project Lead: Maryam N Buageila Budget Analyst: Richard Warren Krause Production Manager: Stanley W Hasper Senior Project Advisor: Mary P Maher Production Manager: Heidi Marie Guyer Production Manager: Bonnie C Andree | | | | | | | | | | | | |
| Description: | <p>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.</p> | | | | | | | | | | | | |
| Project Period | 07/2013 - 04/2014 | Proposal No: | 14-0008 | | | | | | | | | | |
| Data Collection Period | 10/2013 - 03/2014 | | | | | | | | | | | | |
| Security Plan | Yes | | | | | | | | | | | | |
| Milestone Dates | <table border="1"> <tr> <td>PreProduction Start:08/07/2013</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start:</td> </tr> <tr> <td>Staffing Completed:</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start:</td> <td>SS Train End:</td> </tr> <tr> <td>DC Start:</td> <td>DC End:</td> </tr> </table> | | | PreProduction Start: 08/07/2013 | Pretest Start: | Pretest End: | Recruitment Start: | Staffing Completed: | GIT Start: | SS Train Start: | SS Train End: | DC Start: | DC End: |
| PreProduction Start: 08/07/2013 | Pretest Start: | | | | | | | | | | | | |
| Pretest End: | Recruitment Start: | | | | | | | | | | | | |
| Staffing Completed: | GIT Start: | | | | | | | | | | | | |
| SS Train Start: | SS Train End: | | | | | | | | | | | | |
| DC Start: | DC End: | | | | | | | | | | | | |
| Other Project Team Members | Maryam Buageila (management), Heidi Guyer (management), Stan Hasper (management), Heather Rejto (management), Bonnie Andree (management), Holly Ackerman (Programming), Joel Devonshire (Data Ops), Qi Zhu (Data Ops), Karen Donahue (Respondent Payment), Vicki Wagner (assembly coordinator) | | | | | | | | | | | | |
| Other Project Names | NA | | | | | | | | | | | | |
| Report Period | June, 2014 (HRS CAMS13) | Project Phase | Closing | | | | | | | | | | |
| Risk Level | On Track | | | | | | | | | | | | |
| Monthly Update | Close out activities concluded in June. | | | | | | | | | | | | |
| Special Issues | | | | | | | | | | | | | |
| Cost | | | | | | | | | | | | | |
| Jun 09, 2014 | Total Cost to Date (Direct + Indirect): | 408,509.32 | | | | | | | | | | | |
| | Estimated Cost at Completion (E\$AC): | 409,874.39 | | | | | | | | | | | |
| | Total Budget: | 458,267.00 | | | | | | | | | | | |
| | Variance (Budget minus E\$AC): | 35,217.61 | | | | | | | | | | | |
| | Reason For Variance: | The actual sample size was lower than given estimate used for the budget. Some printing and postage estimates were based on 2011 costs, but 2013 costs were actually lower. | | | | | | | | | | | |
| Projections | | | | | | | | | | | | | |
| Jun 09, 2014 | Dollars Projected For Month: | 1,624.31 | | | | | | | | | | | |
| | Actual Dollars Used: | -3,994.36 | | | | | | | | | | | |
| | Variance (Projected minus Actual): | 2,370.05 | | | | | | | | | | | |
| | Reason For Variance: | Respondent payment credits hit in May. | | | | | | | | | | | |

Measures

| | Units Complete | RR | HPI |
|------------------------------|----------------|-----|-----|
| <i>Current Goal:</i> | na | na | |
| <i>Goal at Completion:</i> | 6000 | 70% | |
| <i>Current actual:</i> | 5954 | 71% | |
| <i>Estimate at Complete:</i> | 5954 | 71% | |
| <i>Variance:</i> | -46 | 1% | |

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) | | | | | | | | | | | | |
| Funding Agency | Health and Human Services (HHS), Department of National Institutes of Health | | | | | | | | | | | | |
| IRB | HUM#: UM00080925 | Period Of Approval: | 10/12/13 - 10/11/ | | | | | | | | | | |
| Project Team | Project Lead: Maryam N Buageila Budget Analyst: Richard Warren Krause Production Manager: Bonnie C Andree Senior Project Advisor: Mary P Maher Production Manager: Heidi Marie Guyer Production Manager: | | | | | | | | | | | | |
| Description: | <p>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.</p> | | | | | | | | | | | | |
| Project Period | 07/2013 - 04/2014 | Proposal No: | 14-0024 | | | | | | | | | | |
| Data Collection Period | 11/2013 - 02/2015 | | | | | | | | | | | | |
| Security Plan | Yes | | | | | | | | | | | | |
| Milestone Dates | <table border="1"> <tr> <td>PreProduction Start:08/01/2013</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start:</td> </tr> <tr> <td>Staffing Completed:</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start:</td> <td>SS Train End:</td> </tr> <tr> <td>DC Start:11/20/2013</td> <td>DC End:04/30/2014</td> </tr> </table> | | | 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 |
| PreProduction Start: 08/01/2013 | Pretest Start: | | | | | | | | | | | | |
| Pretest End: | Recruitment Start: | | | | | | | | | | | | |
| Staffing Completed: | GIT Start: | | | | | | | | | | | | |
| SS Train Start: | SS Train End: | | | | | | | | | | | | |
| DC Start: 11/20/2013 | DC End: 04/30/2014 | | | | | | | | | | | | |
| Other Project Team Members | Maryam Buageila, Project Lead; Heidi Guyer, HRS Study Director; Patty Maher, SPA; Bonnie Andree, Help Desk supervisor; Rick Krause, budget analyst; Holly Ackerman, WebLog programmer; Joel Devonshire, data manager; Winter Taylor, project assistant | | | | | | | | | | | | |
| Other Project Names | HRS Health Care and Nutrition Mail Study, HCNMS | | | | | | | | | | | | |
| Report Period | June, 2014 (HRS HCNS) | Project Phase | Closing | | | | | | | | | | |
| Risk Level | On Track | | | | | | | | | | | | |
| Monthly Update | Final production invoice received and paid. HRS signed off on secure destruction of booklets since all data and scanned images have been received. | | | | | | | | | | | | |
| Special Issues | The expected overall response goal in the IRB application was at least 70%. The target response rate was not reached. The PIs have been informed throughout data collection and are consoled by the fact that we have more than 8000 questionnaires logged which they feel is a substantial amount of data. Upon review, the HRS study staff felt that the questionnaire was quite dense and they will be reviewing the scanned documents for respondent comments. We at SRO will also review call records from help desk calls for insight into respondent perception of the questionnaire. | | | | | | | | | | | | |
| Cost Jun 30, 2014 | Total Cost to Date (Direct + Indirect): 578,900.45 Estimated Cost at Completion (E\$AC): 590,756.50 Total Budget: 976,523.00 Variance (Budget minus E\$AC): 385,766.50 Reason For Variance: Budgets total amount allocated at time of HRS 6 year grant. Estimates made by HRS study staff were based on previous vendors and larger estimated sample size. | | | | | | | | | | | | |

**Projections
Jun 30, 2014**

Dollars Projected For Month: 63,529.14
Actual Dollars Used: 63,485.45
Variance (Projected minus Actual): 43.69
Reason For Variance:

Measures

| | Units Complete | RR | HPI |
|------------------------------|----------------|-----|-----|
| Current Goal: | na | na | na |
| Goal at Completion: | 8400 | 70% | na |
| Current actual: | 8084 | 66% | na |
| Estimate at Complete: | 8084 | 66% | na |
| Variance: | -316 | -4% | |

Other Measures

| | | | | |
|--------------------------------------|--|----------------------------|-------------------------|------------------|
| Project Name | HRS Screening Initiatives (HRS Screening Initiatives) | | | |
| Project Mode | Primary: Face to Face | Secondary: Telephone | Total of Modes: 2 | |
| Project Type | Sponsored Projects | | Project Status | Current |
| Budget | Direct Budget: | 512,452.00 | Indirect Budget: | 184,484.00 |
| | | | Total Budget: | 696,936.00 |
| Principal Investigator/Client | David Weir (UM Survey Research Center) Mary Beth Ofstedal (UM Survey Research Center) | | | |
| Funding Agency | | | | |
| IRB | HUM#: | Period Of Approval: | | |
| Project Team | Project Lead: | Frost Alexander Hubbard | | |
| | Budget Analyst: | Richard Warren Krause | | |
| | Production Manager: | Theresa Camelo | | |
| | Senior Project Advisor: | Nicole G Kirgis | | |
| | Production Manager: | | | |
| | Production Manager: | | | |
| Description: | <p>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. In addition, since the funding for the sampling work for HRS 2016 new cohort screening will not be received by the ISR until January 2015, the production sampling work of determining the number of PSUs and segments to select, creating the PSU sampling frame, and selecting PSUs, were all done under this budget.</p> <p>The following were all conducted under this project's budget in order to design the optimal 2016 screening methods:</p> <p>(1) A detailed analysis of the HRS 2010-11 screening results</p> <p>(2) 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)</p> <p>(3) a tracking experiment to determine the most cost effective method(s) for determining the current address of the LBB birth cohort members identified during the 2010,</p> <p>(4) developing a 2016 sample design which was submitted as part of the proposal sent to NIA for sending for the 2016 new birth cohort screening.</p> <p>Note: After a 9/18/2013 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. However, the PI's did not specify the amount to which the budget should be limited</p> <p>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.</p> <p>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.</p> <p>Address lists will be compiled utilizing information from external databases such as MSG and Aristotle. The DMV data was too difficult to obtain for states other than Michigan and the Valassis data did not have commercial data at the address level. Three PSUs and 3 segments per PSU were selected to reflect geographic and demographic variations. Experienced interviewers were be hired and trained for the screening experiment during August 2013. Each interviewer completed screening interviews in at least one segment.</p> | | | |
| Project Period | 09/2012 - 12/2014 | | Proposal No: | SRO # 11-0010R01 |
| Data Collection Period | 08/2013 - 10/2013 | | | |
| Security Plan | Yes | | | |

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

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

**Other Project
Names****Report Period**June, 2014 (HRS Screening Initiatives) **Project Phase** Implementing**Risk Level***On Track***Monthly Update**

2013 SCREENING EXPERIMENT

Budget:

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

Final Reports:

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

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

Exploration with the Census Bureau

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

Aristotle

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

HRS2016 Sample Design:

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

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

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

LBB Tracking Experiment (Total Spent thus far \$21,817.84. Cost at Complete: \$44,565.62)

In April, Kyle Kwaiser processed all of the address updates for each person in the LBB tracking experiment from Lorton Data and Accurint. In early May, we will send out the 2014 HRS newsletter to 2/3's of the address in mid-April. The experimental design calls for 2/3's of the LBBs in the experiment to be sent an HRS newsletter each year. The remaining third will only be tracked passively via these commercial data sources until we attempt to locate them and request participation in the HRS in 2016.

Special Issues

Cost
May 08, 2014

Total Cost to Date (Direct + Indirect): 500,357.30
Estimated Cost at Completion (E\$AC): 613,592.25
Total Budget: 696,936.00
Variance (Budget minus E\$AC): 58,731.00
Reason For Variance:

Projections
May 08, 2014

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

Measures

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

Other Measures

Project Name MILES Lupus Study (MILES)

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

Project Type Sponsored Projects **Project Status** Current

Budget ***Direct Budget:*** 134,862.00 ***Indirect Budget:*** 74,848.00 ***Total Budget:*** 209,710.00

Principal Investigator/Client Emily Somers (University of Michigan School of Public Health)
Sioban Harlow (University of Michigan School of Public Health)

Funding Agency Department of Health and Human Services - Centers for Disease Control and Prevention

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

Project Team ***Project Lead:*** Robert Lee
Budget Analyst: Janelle P Cramer
Production Manager: Lisa J Carn
Senior Project Advisor: Heidi Marie Guyer
Production Manager: Cheryl Wiese
Production Manager: _UnAssigned

Description: This project is designed to recruit a population-based control group that is frequency matched on key demographic characteristics of lupus cases selected from a registry. To do so, SRO will sample households from Washtenaw and Wayne counties in Michigan, mail a screener questionnaire, and make follow-up phone calls to those who did not return the screener SAQ in order to complete the screener by phone. The goal is to recruit a sample of 720 participants between the ages of 18 and 74 of whom 90% are female and 56% are African American. Phone calls will be made to identify respondents that meet these characteristics based on the shortfall from the mail returns. The expectation is that 70% will then agree to complete a clinic visit when contacted by the School of Public Health project staff.

A total of approximately 2,700 addresses will be selected in Washtenaw and Wayne counties in Michigan. The addresses will be sent to a sample vendor to obtain the names and phone numbers associated with those addresses, and those names will be used in the mailings. Those in which a name cannot be found will be mailed to "resident" at the selected address. After a full round of SAQ effort (pre-notification letter, initial mailing with SAQ, post card reminder, and 2nd SAQ mailing to the unresolved), SSL interviewers will conduct recruitment calls to either complete the screener interview by phone or encourage respondents to return the SAQ. It is anticipated that the mail phase of the project will yield about a 40% response rate, and that the telephone follow-up will boost the overall response rate to approximately 55%. An SRO sampling statistician will select the Address Based Sample (ABS) in Wayne and Washtenaw counties from a Delivery Sequence File (DSF) or similar with a 2-1 oversample of residents of the City of Detroit to account for the demographics of the cases.

A pretest or pilot will not take place. However, data collection will be conducted in three phases. An initial release of 500 cases will first be released to determine whether the assumptions are accurate. Releases 2 and 3 will be released in August and September. The sample may be augmented depending on the achieved rates compared to the estimated.

Returned paper screeners will be data entered by the SSL staff and telephone interviews will be completed by the SSL as well. A Blaise instrument will be used to data enter the paper screeners and to conduct the telephone interview. SMS will be used for sample management. Client reports will be generated and provided on a weekly basis.

Project Period 04/2014 - 08/2015 **Proposal No:** 14-0001R02

Data Collection Period 07/2014 - 12/2014

Security Plan NA

Milestone Dates

| | |
|---|---|
| <i>PreProduction Start:</i> 04/01/2014 | <i>Pretest Start:</i> |
| <i>Pretest End:</i> | <i>Recruitment Start:</i> 05/01/2014 |
| <i>Staffing Completed:</i> 06/12/2014 | <i>GIT Start:</i> |
| <i>SS Train Start:</i> 06/18/2014 | <i>SS Train End:</i> 06/18/2014 |
| <i>DC Start:</i> 06/19/2014 | <i>DC End:</i> 01/31/2015 |

Other Project Team Members James Hagerman (Blaise/SMS), Dave Dybicki (Blaise/SMS), Jennie Williams (data manager), Dan Zahs (senior statistician), Paul Schultz (statistician)

Other Project Names The Michigan Lupus Epidemiology & Surveillance Program Cohort and Biobank - Control Group Recruitment

Report Period June, 2014 (MILES) **Project Phase** Initiation

Risk Level On Track

Monthly Update

Pre-production activities that have taken place on the MILES project in the month of June including drafting and revising all project materials, submitting the materials to the IRB, refining the project goals and plan, developing and updating the project timeline, determining the sample selection criteria, selecting and delivering the sample, programming of the screener questionnaire in Blaise and developing SMS specifications. An important point to note is that SRO is recruiting a control group that is frequency matched to cases from a registry of lupus cases identified between 2002-2005. As such, we will recruit specific numbers of control participants meeting key demographic criteria (age, gender, race). Additionally, the controls that we recruit must have been residents of Wayne or Washtenaw Co. between 2002 and 2005. Thus, the telephone calls will be scripted to meet these eligibility criteria based on the sample needs remaining once the mail questionnaires have been entered and eligibility determined.

Special Issues

The Project Lead is on unexpected medical leave. Cheryl Wiese will fill in as the Project Lead and Heidi Guyer as the SPA on the project. The client has been informed and is in agreement. Additionally, the project timeline has shifted slightly as well. Regarding the budget, year 1 funding must be spent by the end of September 2014. This should be possible based on the current budget projections.

**Cost
Jun 20, 2014**

| | |
|--|------------|
| Total Cost to Date (Direct + Indirect): | 10,814.85 |
| Estimated Cost at Completion (E\$AC): | 209,710.00 |
| Total Budget: | 209,710.00 |
| Variance (Budget minus E\$AC): | 0.00 |
| Reason For Variance: | |

**Projections
Jun 20, 2014**

| | |
|---|---|
| Dollars Projected For Month: | 0.00 |
| Actual Dollars Used: | 10,814.85 |
| Variance (Projected minus Actual): | 10,814.85 |
| Reason For Variance: | May was the first month of activity on the MILES project. An initial set of projections have been entered in CRS and will be updated. |

Measures

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

Other Measures

| | | | | | |
|--|---|------------------------------------|---------------------------------|--|--|
| Project Name | Monitoring the Future 2014 Base Year (MTF BY 2014) | | | | |
| Project Mode | Primary: Class SAQ Total of Modes: 1 | | | | |
| Project Type | Sponsored Projects | Project Status | Current | | |
| Budget | Direct Budget: 606,449.00 | Indirect Budget: 336,579.00 | Total Budget: 943,028.00 | | |
| Principal Investigator/Client | Lloyd Johnston (SRC) Jerry Bachman (SRC) Patrick O'Malley (SRC) | | | | |
| Funding Agency | | | | | |
| IRB | HUM#: 00063656 | Period Of Approval: | 8/7/2013-8/6/2014 | | |
| Project Team | Project Lead: Lloyd Fate Hemingway Budget Analyst: Christine Evanchek Production Manager: Sarah Crane Senior Project Advisor: Jody Dougherty Production Manager: Production Manager: | | | | |
| Description: | For the Base Year component of Monitoring the Future, approximately 500,000 8th-, 10th, and 12th grade students complete self-administered questionnaires at a national cross-section of approximately 415 schools. There are several different forms of the questionnaire, which deals with a wide variety of respondent attitudes and behaviors, including such topics as alcohol, drug, and tobacco use; social and political attitudes; and leisure time activities. Project staff recruits the schools to participate, and field interviewers conduct the questionnaire administrations. | | | | |
| Project Period | 10/2013 - 07/2014 | Proposal No: | 11-0050R01 | | |
| Data Collection Period | 02/2014 - 06/2014 | | | | |
| Security Plan | Yes | | | | |
| Milestone Dates | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center; padding: 5px;"> PreProduction Start:11/01/2013 Pretest End: Staffing Completed:11/30/2013 SS Train Start:01/07/2014 DC Start:02/15/2014 </td> <td style="text-align: center; padding: 5px;"> Pretest Start: Recruitment Start:11/01/2013 GIT Start: SS Train End:01/24/2014 DC End:05/31/2014 </td> </tr> </table> | | | PreProduction Start: 11/01/2013 Pretest End: Staffing Completed: 11/30/2013 SS Train Start: 01/07/2014 DC Start: 02/15/2014 | Pretest Start: Recruitment Start: 11/01/2013 GIT Start: SS Train End: 01/24/2014 DC End: 05/31/2014 |
| PreProduction Start: 11/01/2013 Pretest End: Staffing Completed: 11/30/2013 SS Train Start: 01/07/2014 DC Start: 02/15/2014 | Pretest Start: Recruitment Start: 11/01/2013 GIT Start: SS Train End: 01/24/2014 DC End: 05/31/2014 | | | | |
| Other Project Team Members | Marsha Skoman Jennie Williams Holly Ackerman | | | | |
| Other Project Names | | | | | |
| <hr/> | | | | | |
| Report Period | June, 2014 (MTF BY 2014) | Project Phase | Initiation | | |
| Risk Level | Not Rated | | | | |
| Monthly Update | No update information available on June activities. | | | | |
| Special Issues | | | | | |
| Cost | | | | | |
| Jul 31, 2014 | Total Cost to Date (Direct + Indirect): 0.00 Estimated Cost at Completion (E\$AC): 0.00 Total Budget: 943,028.00 Variance (Budget minus E\$AC): 0.00 Reason For Variance: | | | | |
| Projections | | | | | |
| Jul 31, 2014 | Dollars Projected For Month: 0.00 Actual Dollars Used: 0.00 Variance (Projected minus Actual): 0.00 Reason For Variance: | | | | |

Measures

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

Other Measures

Project Name Monitoring the Future Web Programming and Survey Pilot (MTF-WPSP Year 2)

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

Project Type Sponsored Projects **Project Status** Current

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

Principal Investigator/Client Megan Patrick (UM-SRC)

Funding Agency U.S. Department of Health & Human Services, National Institutes of Health

IRB **HUM#:** 00081391 **Period Of Approval:** 8/1/2012 - 4/30/21

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 Period 04/2014 - 08/2014

Security Plan Yes

Milestone Dates

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

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

Other Project Names MTF Web

Report Period June, 2014 (MTF-WPSP Year 2) **Project Phase** Implementing

Risk Level Not Rated

Monthly Update 760 web questionnaires have been completed and 662 paper questionnaires have been received., & there are 35 web surveys started but not completed.

Non-response training went well and non-response calling has begun. 285 R's have been reminded, 62 lost. Approximately 1900 cases (a bit less than half) have no attempts so far.

Special Issues

| | | |
|------------------------------------|--|------------|
| Cost May 31, 2014 | <i>Total Cost to Date (Direct + Indirect):</i> | 169,484.49 |
| | <i>Estimated Cost at Completion (E\$AC):</i> | 240,522.69 |
| | <i>Total Budget:</i> | 262,564.00 |
| | <i>Variance (Budget minus E\$AC):</i> | 22,041.31 |
| | <i>Reason For Variance:</i> | |

| | | |
|---|---|-----------|
| Projections May 31, 2014 | <i>Dollars Projected For Month:</i> | 11,892.37 |
| | <i>Actual Dollars Used:</i> | 8,307.79 |
| | <i>Variance (Projected minus Actual):</i> | 3,584.58 |
| | <i>Reason For Variance:</i> | |

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

Other Measures

| | | | | | | |
|--|---|---------------|----------------------------|--|--|---|
| Project Name | National Survey of Family Growth (NSFG 2010-2020) | | | | | |
| Project Mode | Primary: Face to Face Total of Modes: 1 | | | | | |
| Project Type | Sponsored Projects | | Project Status | Current | | |
| Budget | Direct Budget: | 29,713,370.00 | Indirect Budget: | 10,439,833.00 Total Budget: 40,153,203.00 | | |
| Principal Investigator/Client | William Mosher (NCHS) Mick Couper (ISR) | | | | | |
| Funding Agency | NCHS, CDC, NICHD | | | | | |
| IRB | HUM#: | 0002716 | Period Of Approval: | 7/17/13 - 7/17/14 | | |
| Project Team | Project Lead: Heidi Marie Guyer Budget Analyst: Nancy Oeffner Production Manager: Sharon K Parker Senior Project Advisor: Mary P Maher Production Manager: Maureen Joan O'Brien Production Manager: Daniel Tomlin | | | | | |
| Description: | <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> | | | | | |
| Project Period | 09/2010 - 07/2020 | | Proposal No: | | | |
| Data Collection Period | 09/2011 - 06/2019 | | | | | |
| Security Plan | Yes | | | | | |
| Milestone Dates | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center; padding: 5px;"> PreProduction Start:03/01/2011 Pretest End: Staffing Completed:08/17/2011 SS Train Start:09/15/2011 DC Start:09/20/2011 </td> <td style="text-align: center; padding: 5px;"> Pretest Start: Recruitment Start:06/01/2011 GIT Start:09/13/2011 SS Train End:09/19/2011 DC End:07/01/2019 </td> </tr> </table> | | | | 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 |
| 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, Jennifer Kelley--Project Manager, Theresa Camelo-- Production Manager | | | | | |
| Other Project Names | | | | | | |
| <hr style="border-top: 1px dashed #000;"/> | | | | | | |
| Report Period | June, 2014 (NSFG 2010-2020) | | Project Phase | Implementing | | |
| Risk Level | Not Rated | | | | | |
| Monthly Update | <p>Q11 finished on Saturday, June 21st. 1,280 interviews were completed in Q11 at an HPI of 9.8 and an eligibility rate of 49.4%. The number of completed interviews exceeded the minimum goal of 1250. The HPI is higher than estimated (9.8 vs 9.0) and the eligibility rate is lower than predicted (49.4% vs 54%). The increased HPI appears to be somewhat attributable to the low eligibility rate and the increased rate of travel. However, the yield was excellent given these constraints. Q12 began on Sunday, June 22nd. A slightly larger sample size was released for Q12 to account for the low eligibility trend and to ensure that we will exceed the minimum target of 5000 annual interviews (Q12 is the last quarter of the year). Year 4 recruitment is underway with current on-staffers confirmed, non-NSFG on-staff recruitment in areas new for year 4 complete and new hire recruitment currently taking place. We estimate 7 new hires and 10 on-staffers at the year 4 training. Some updates will be made to technical systems and reports for year 4. In June, the first round of hands-on testing took place of potential hardware options for 2015.</p> | | | | | |
| Special Issues | <p>Two issues to note regarding the budget: updates are needed to the technical systems as well as the reports and the paradata dashboard. Such updates were not originally included in the Cycle 8 budget. FISMA-related time and costs appear to exceed our initial expectations. We will provide a cost impact analysis to NCHS as they are requesting additional funds to cover these unanticipated costs. The NCHS NSFG Project Officer, William Mosher, has resigned, effective August 1st. Joyce Abma will assume the role of Project Officer.</p> | | | | | |
| Cost | | | | | | |
| Jun 09, 2014 | Total Cost to Date (Direct + Indirect): | | 13,728,817.57 | | | |
| | Estimated Cost at Completion (E\$AC): | | 40,153,203.00 | | | |
| | Total Budget: | | 40,153,203.00 | | | |
| | Variance (Budget minus E\$AC): | | 0.00 | | | |

Reason For Variance:

CRS shows a variance due to projections entered through 2020. As of June 2014, total costs through year 3 of data collection are in line with the projections and funding.

Projections
Jun 09, 2014

Dollars Projected For Month:

480,634.16

Actual Dollars Used:

476,976.84

Variance (Projected minus Actual):

3,657.32

Reason For Variance:**Measures**

| | Units Complete | RR | HPI |
|------------------------------|----------------|------|-------|
| Current Goal: | 1250 | 75% | 9.0 |
| Goal at Completion: | 1250 | 75% | 9.0 |
| Current actual: | 45 | 1.2% | 12.85 |
| Estimate at Complete: | 1250 | 75% | 10.0 |
| Variance: | 0 | 0 | 1.0 |

Other Measures

| | | | | | | | | | | | | | |
|--|---|--------------------------------------|-----------------------------------|--|----------------------------------|--------------------------------|--------------------------------------|---------------------------------------|-------------------|-----------------------------------|---------------------------------|-----------------------------|---------------------------|
| Project Name | Panel Study of Income Dynamics 2013 (Family Economics Study) (PSID 2013) | | | | | | | | | | | | |
| Project Mode | Primary: Telephone | Secondary: Face to Face | Total of Modes: 2 | | | | | | | | | | |
| Project Type | Sponsored Projects | Project Status | Current | | | | | | | | | | |
| Budget | Direct Budget: 3,238,350.00 | Indirect Budget: 1,797,280.00 | Total Budget: 5,035,629.00 | | | | | | | | | | |
| Principal Investigator/Client | Charles Brown (Director) (ISR-SRC) Vicki Freedman & Narayan Sastry (Associate Dirs) (ISR-SRC) Katherine McGonagle (Assistant Dir) (ISR-SRC) | | | | | | | | | | | | |
| Funding Agency | | | | | | | | | | | | | |
| IRB | HUM#: HUM00062417 | Period Of Approval: | 1/17/2014 - 1/16/ | | | | | | | | | | |
| Project Team | Project Lead: Shonda R Kruger-Ndiaye Budget Analyst: Steve Bright Production Manager: Sara D Freeland Senior Project Advisor: Stephanie A Chardoul Production Manager: _UnAssigned Production Manager: Jennifer C Arrieta | | | | | | | | | | | | |
| Description: | <p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p> | | | | | | | | | | | | |
| Project Period | 04/2012 - 03/2014 | Proposal No: | SO # 10-0056 | | | | | | | | | | |
| Data Collection Period | 03/2013 - 12/2013 | | | | | | | | | | | | |
| Security Plan | Yes | | | | | | | | | | | | |
| Milestone Dates | <table border="1"> <tr> <td>PreProduction Start:06/14/2012</td> <td>Pretest Start:10/31/2012</td> </tr> <tr> <td>Pretest End:11/13/2012</td> <td>Recruitment Start:09/28/2012</td> </tr> <tr> <td>Staffing Completed:01/01/2013</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start:02/23/2013</td> <td>SS Train End:03/08/2013</td> </tr> <tr> <td>DC Start:03/11/2013</td> <td>DC End:12/31/2013</td> </tr> </table> | | | 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 |
| PreProduction Start: 06/14/2012 | Pretest Start: 10/31/2012 | | | | | | | | | | | | |
| Pretest End: 11/13/2012 | Recruitment Start: 09/28/2012 | | | | | | | | | | | | |
| Staffing Completed: 01/01/2013 | GIT Start: | | | | | | | | | | | | |
| SS Train Start: 02/23/2013 | SS Train End: 03/08/2013 | | | | | | | | | | | | |
| DC Start: 03/11/2013 | DC End: 12/31/2013 | | | | | | | | | | | | |
| Other Project Team Members | 2011 Study Director/Advisor--Eva Leissou Tech Lead--Jeff Smith Blaise Programming--Youhong Liu STrak Programming--Brant Zhang Data Ops--Brad Goodwin, Minako Edgar, and Emily Blasczyk WTrak/WLog Programming--Holly Ackerman Help Desk Lead--Andrea Pierce Production Manager Support--Peggy Lavanger | | | | | | | | | | | | |
| Other Project Names | Family Economics Study (FES) | | | | | | | | | | | | |
| Report Period | June, 2014 (PSID 2013) | Project Phase | Closing | | | | | | | | | | |
| Risk Level | On Track | | | | | | | | | | | | |
| Monthly Update | There was no active May/June work. We just need to finalize this cost report. | | | | | | | | | | | | |
| Special Issues | | | | | | | | | | | | | |

Cost
May 31, 2014

Total Cost to Date (Direct + Indirect): 5,026,516.65
Estimated Cost at Completion (E\$AC): 5,026,516.65
Total Budget: 5,035,629.00
Variance (Budget minus E\$AC): 9,112.35
Reason For Variance:

The Total Cost-to-Complete is now estimated to be underrun (as shown above) but the Direct Cost-to-Complete is estimated be \$19,018.33 overrun. This discrepancy is due to the projections of Indirects being made in CRS at a different rate than is authorized for one of our funders. So, we always have an Indirect surplus. The direct overrun is less than was projected last month and is \$34,399.27 *less* than the overrun that was estimated at the time of the March baseline projection with Project Staff. Since then, a large variety of factors have influenced costs in both directions. It's difficult to pin this small variation to a single or even a small set of factors.

Projections
May 31, 2014

Dollars Projected For Month: 0.00
Actual Dollars Used: -1,343.54
Variance (Projected minus Actual): -1,343.54
Reason For Variance:

Some misdirected charges were reversed. It appears that the \$610.67 in misdirected April non-sal charges still need to be reversed too.

Measures

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

Other Measures

Note: HPI is Cumulative Production HPI.

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

| | | | | | |
|---|---|-----------------------|--------------|---|--|
| Project Name | Panel Study of Income Dynamics Childhood Experiences Web/Mail Project (PSID-CE (aka FES-CE)) | | | | |
| Project Mode | Primary: Web Secondary: Mail Total of Modes: 2 | | | | |
| Project Type | Sponsored Projects | Project Status | Current | | |
| Budget | Direct Budget: 284,283.00 Indirect Budget: 157,778.00 Total Budget: 442,061.00 | | | | |
| Principal Investigator/Client | Vicki Freedman (U of M Survey Research Center) James Smith (RAND) Kate McGonagle (U of M Survey Research Center) | | | | |
| Funding Agency | | | | | |
| IRB | HUM#: HUM00051456 Period Of Approval: Approved w/Cont | | | | |
| Project Team | Project Lead: Shonda R Kruger-Ndiaye Budget Analyst: Steve Bright Production Manager: Anthony Romanowski Senior Project Advisor: Stephanie A Chardoul Production Manager: Production Manager: | | | | |
| Description: | <p>PSID-CE is the first web survey associated with the PSID. The sample for the study is comprised of virtually all PSID respondents and spouses and will include approximately 13,100 individuals. Potential respondents will be invited either to complete an on-line instrument or—in the case of those who have not reported Internet access at home—given the option to complete the instrument on-line or on paper. Follow-up efforts will consist of both hard-copy and e-mailed reminders as well as non-response calling. The interview content includes questions about childhood health conditions, socioeconomic status, neighborhood(s), friendships, school experiences, criminal activity as well as the parenting experienced as children. To help respondents accurately recall their ages when various events occurred, the on-line version of the questionnaire features a custom-built dynamic life history calendar. Due to the sensitivity of the content, a Certificate of Confidentiality will be obtained.</p> | | | | |
| Project Period | 08/2013 - 10/2014 | Proposal No: | 11-0026R06 | | |
| Data Collection Period | 05/2014 - 09/2014 | | | | |
| Security Plan | Yes | | | | |
| Milestone Dates | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center; padding: 5px;"> PreProduction Start:08/01/2013 Pretest End:03/31/2014 Staffing Completed: SS Train Start: DC Start:05/08/2014 </td> <td style="text-align: center; padding: 5px;"> Pretest Start:02/10/2014 Recruitment Start:03/10/2014 GIT Start: SS Train End: DC End:09/30/2014 </td> </tr> </table> | | | PreProduction Start: 08/01/2013 Pretest End: 03/31/2014 Staffing Completed: SS Train Start: DC Start: 05/08/2014 | Pretest Start: 02/10/2014 Recruitment Start: 03/10/2014 GIT Start: SS Train End: DC End: 09/30/2014 |
| PreProduction Start: 08/01/2013 Pretest End: 03/31/2014 Staffing Completed: SS Train Start: DC Start: 05/08/2014 | Pretest Start: 02/10/2014 Recruitment Start: 03/10/2014 GIT Start: SS Train End: DC End: 09/30/2014 | | | | |
| Other Project Team Members | Emily Blasczyk--Data Manager and Report Programmer Hueichun Peng--Custom Project SMS Programmer Donnalee Grey-Farquharson--Custom Project SMS Design/Specifications Robert Fenton--Illume Programmer Youhong Liu--Illume Programmer Consultant Meredith House--Web Consultant Becky Loomis & Gail Arnold--R Materials Assistance | | | | |
| Other Project Names | Family Economics Study Childhood Experiences Project PSID Web/Mail | | | | |
| Report Period | June, 2014 (PSID-CE (aka FES-CE)) | Project Phase | Implementing | | |
| Risk Level | Some Concerns | | | | |
| Monthly Update | June work included: <ul style="list-style-type: none"> • June 20th launch of non-response calling. • On-going implementation of follow-up protocol (mailings and e-mail reminders). • On-going tweaking of follow-up protocol in response to observed production trends. • Training of TLs in the TL functions of the SMS. • Training of the iwers in non-response calling and the SMS. • Design and programming work on the PAPI data entry application. • Report specification and programming. | | | | |

Special Issues

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

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

The project has determined it must take a very hard line on R confidentiality including forbidding any reference to the study name in e-mail correspondence to the Rs, even disallowing sending the URL to Rs.

Cost
May 31, 2014

Total Cost to Date (Direct + Indirect): 209,604.33

Estimated Cost at Completion (E\$AC): 479,242.56

Total Budget: 442,061.00

Variance (Budget minus E\$AC): -37,181.56

Reason For Variance:

The project's scope has changed significantly since originally budgeted. The number of interventions (mailings and e-mail reminders has increased). The number of versions of intervention materials has increased and the amount of sample reaching each intervention point has increased (due to lower than target production).

Shonda and Steve have not yet finished updating projections to ensure adequate coverage of future planned scope. We will do so using the June cost report in order to use actual data from more Rel 1 interventions to predict the cost of Rel 2 and Rel 3 work.

Projections
May 31, 2014

Dollars Projected For Month: 80,339.57

Actual Dollars Used: 50,176.62

Variance (Projected minus Actual): 30,162.95

Reason For Variance:

The main driver for the variance was that projections reflected an earlier production launch. This is not a reflection of reduced scope.

Measures

| | Units Complete | RR | HPI |
|------------------------------|----------------|-------|-----|
| Current Goal: | 1,604 | 70% | |
| Goal at Completion: | 19,482 | 85% | .8 |
| Current actual: | 948 | 41.4% | |
| Estimate at Complete: | | | |
| Variance: | | | |

Other Measures

Units completed and RR are as of 6/20 (the start of NR calling) and reflect Release 1 only.

HPI isn't recorded as NR calling had not yet begun.

| | | | | | |
|---|--|------------------------------------|-----------------------------------|---|---|
| Project Name | Social Relations, Aging and Health: Competing Theories and Emerging Complexities, Wave 3 (SRS W3) | | | | |
| Project Mode | Primary: Telephone | Secondary: Web | Total of Modes: 2 | | |
| Project Type | Sponsored Projects | Project Status | Current | | |
| Budget | Direct Budget: 950,999.00 | Indirect Budget: 527,805.00 | Total Budget: 1,478,804.00 | | |
| Principal Investigator/Client | Toni Antonucci (SRC) Kira Birditt (SRC) | | | | |
| Funding Agency | National Institute of Health | | | | |
| IRB | HUM#: 00074983 | Period Of Approval: | Exp3-11-15 | | |
| 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: | <p>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).</p> | | | | |
| Project Period | 01/2014 - 01/2017 | Proposal No: | SRO #13-0020 | | |
| Data Collection Period | 07/2014 - 10/2016 | | | | |
| Security Plan | Yes | | | | |
| Milestone Dates | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center; padding: 5px;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: 06/24/2014 DC Start: </td> <td style="text-align: center; padding: 5px;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table> | | | PreProduction Start: Pretest End: Staffing Completed: SS Train Start: 06/24/2014 DC Start: | Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: |
| PreProduction Start: Pretest End: Staffing Completed: SS Train Start: 06/24/2014 DC Start: | Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: | | | | |
| Other Project Team Members | Rebecca Loomis, Dave Dybicki, Dan Zahs, Hueichun Peng, Max Malhortra, Minako Edgar, Robert Fenton, Shaowei Sun | | | | |
| Other Project Names | Social Relations 2014 | | | | |
| Report Period | June, 2014 (SRS W3) | Project Phase | Planning | | |
| Risk Level | On Track | | | | |
| Monthly Update | <p>Weekly meetings continued with Project Staff to assist in clarifying details of project. In June we continued testing and pretesting with training scheduled and held end of June.</p> <p>Budget strategy is to wait for re-budget until real production costs are known. Client wants highest possible response for baseline interviews. Follow-up on journals may need to be reduced to save funds and/or client may have other ideas for a re-budget or additional funds.</p> | | | | |
| 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 Jun 30, 2014 | Total Cost to Date (Direct + Indirect): 94,939.87 Estimated Cost at Completion (E\$AC): 1,335,847.64 Total Budget: 1,478,804.00 Variance (Budget minus E\$AC): -130,472.06 Reason For Variance: We are still projecting full costs for approved workscope. Client has informed us there will be at least an 18% cut so we are showing this as overrun | | | | |

Projections
Jun 30, 2014

Dollars Projected For Month: 54,792.19
Actual Dollars Used: 35,513.47
Variance (Projected minus Actual): 19,278.72
Reason For Variance: SSL costs for pretest have been postponed to end of May due to changes in instrument by client and testing schedule. Production now slated for early July

Measures

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

Other Measures

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

| | | | | | | | | | | | | | |
|--------------------------------------|---|------------------------------|---------------------------------|-----------------------------|-----------------------|---------------------|---------------------------|----------------------------|-------------------|------------------------|----------------------|------------------|----------------|
| Project Name | Surveys of Consumer Attitudes (SCA 2014) | | | | | | | | | | | | |
| Project Mode | Primary: Telephone Total of Modes: 1 | | | | | | | | | | | | |
| Project Type | Sponsored Projects | Project Status | Current | | | | | | | | | | |
| Budget | Direct Budget: 649,196.00 | Indirect Budget: 0.00 | Total Budget: 649,196.00 | | | | | | | | | | |
| Principal Investigator/Client | Dr. Richard T. Curtin (SRC) | | | | | | | | | | | | |
| Funding Agency | Thompson-Reuters, others for riders | | | | | | | | | | | | |
| IRB | HUM#: B03-00002545-R2 | Period Of Approval: | thru 10/30/2014 | | | | | | | | | | |
| Project Team | Project Lead: Joseph Matthew Matuzak Budget Analyst: Steve Bright Production Manager: Senior Project Advisor: Mary P Maher Production Manager: Andrea Sims Production Manager: | | | | | | | | | | | | |
| Description: | <p>The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations.</p> <p>The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 500 interviews.</p> | | | | | | | | | | | | |
| Project Period | 01/2014 - 12/2014 | Proposal No: | 14-0038 | | | | | | | | | | |
| Data Collection Period | 01/2014 - 12/2014 | | | | | | | | | | | | |
| Security Plan | Yes | | | | | | | | | | | | |
| Milestone Dates | <table border="1"> <tr> <td>PreProduction Start:</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start:</td> </tr> <tr> <td>Staffing Completed:</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start:</td> <td>SS Train End:</td> </tr> <tr> <td>DC Start:</td> <td>DC End:</td> </tr> </table> | | | PreProduction Start: | Pretest Start: | Pretest End: | Recruitment Start: | Staffing Completed: | GIT Start: | SS Train Start: | SS Train End: | DC Start: | DC End: |
| PreProduction Start: | Pretest Start: | | | | | | | | | | | | |
| Pretest End: | Recruitment Start: | | | | | | | | | | | | |
| Staffing Completed: | GIT Start: | | | | | | | | | | | | |
| SS Train Start: | SS Train End: | | | | | | | | | | | | |
| DC Start: | DC End: | | | | | | | | | | | | |
| Other Project Team Members | Dave Dybicki Ann Munster Pamela Swanson Jennie Williams LaVelvet Harrison SCA | | | | | | | | | | | | |
| Other Project Names | | | | | | | | | | | | | |
| Report Period | June, 2014 (SCA 2014) | Project Phase | Implementing | | | | | | | | | | |
| Risk Level | Some Concerns | | | | | | | | | | | | |
| Monthly Update | SCA completed its June study on time, with 507 completed interviews, 346 RDDs and 161 Recons. The RDD split was 129 landline cases and 217 cell phones, which meant we missed our goal of completing 225 cell RDDs. The instrument was 33.1 minutes in length, the third long instrument of the year. Our HPI was about 2.74, higher than our target of 2.5, and our average number of attempts per interview jumped to 2.99, the highest of the year. This was primarily because we released less sample lines and ended up working the ones that remained more than we have been doing under SCA's model of discarding sample without an identified respondent after three dials. This month we ran out of sample and tried going back to likely cases to give them additional dials. This yielded more interviews, but drove the dials per interview numbers higher. | | | | | | | | | | | | |
| Special Issues | | | | | | | | | | | | | |
| Cost | | | | | | | | | | | | | |
| Jun 30, 2014 | Total Cost to Date (Direct + Indirect): | 282,944.39 | | | | | | | | | | | |
| | Estimated Cost at Completion (E\$AC): | 665,200.10 | | | | | | | | | | | |
| | Total Budget: | 649,196.00 | | | | | | | | | | | |
| | Variance (Budget minus E\$AC): | -16,004.10 | | | | | | | | | | | |

Reason For Variance:

Instruments in January, April, and June were all longer than projected in the original budget. We have also added a large number of interviewers in the early part of the year, something we do not expect to continue.

Projections
Jun 30, 2014

Dollars Projected For Month:

56,481.28

Actual Dollars Used:

3,392.79

Variance (Projected minus Actual):

-2,917.28

Reason For Variance:

For May/June: Added length of instrument, higher than expected hours per interview.

Measures

| | Units Complete | RR | HPI |
|------------------------------|----------------|----|------|
| Current Goal: | | | |
| Goal at Completion: | 500 | 10 | 2.50 |
| Current actual: | | | |
| Estimate at Complete: | 507 | 10 | 2.74 |
| Variance: | 7 | 0 | 0.74 |

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) | | | | | | | | | | | | |
| Funding Agency | | | | | | | | | | | | | |
| IRB | HUM#: | Period Of Approval: | | | | | | | | | | | |
| Project Team | Project Lead: | Cheryl Wiese | | | | | | | | | | | |
| | Budget Analyst: | Rhonda R McCammon | | | | | | | | | | | |
| | Production Manager: | | | | | | | | | | | | |
| | Senior Project Advisor: | Stephanie A Chardoul | | | | | | | | | | | |
| | Production Manager: | | | | | | | | | | | | |
| | Production Manager: | | | | | | | | | | | | |
| Description: | <p>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.</p> <p>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.</p> | | | | | | | | | | | | |
| Project Period | 07/2012 - 06/2017 | Proposal No: | 11-0042R03 | | | | | | | | | | |
| Data Collection Period | 10/2012 - 12/2016 | | | | | | | | | | | | |
| Security Plan | | | | | | | | | | | | | |
| Milestone Dates | <table border="1"> <tr> <td>PreProduction Start:01/01/2012</td> <td>Pretest Start:09/04/2012</td> </tr> <tr> <td>Pretest End:09/12/2012</td> <td>Recruitment Start:</td> </tr> <tr> <td>Staffing Completed:</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start:</td> <td>SS Train End:</td> </tr> <tr> <td>DC Start:11/04/2013</td> <td>DC End:12/23/2013</td> </tr> </table> | | | PreProduction Start: 01/01/2012 | Pretest Start: 09/04/2012 | Pretest End: 09/12/2012 | Recruitment Start: | Staffing Completed: | GIT Start: | SS Train Start: | SS Train End: | DC Start: 11/04/2013 | DC End: 12/23/2013 |
| PreProduction Start: 01/01/2012 | Pretest Start: 09/04/2012 | | | | | | | | | | | | |
| Pretest End: 09/12/2012 | Recruitment Start: | | | | | | | | | | | | |
| Staffing Completed: | GIT Start: | | | | | | | | | | | | |
| SS Train Start: | SS Train End: | | | | | | | | | | | | |
| DC Start: 11/04/2013 | DC End: 12/23/2013 | | | | | | | | | | | | |
| Other Project Team Members | Dave Dybicki & Meredith House providing Illume programming support. Becky Loomis providing some administrative assistance. Heather Schroeder providing weighting and data prep-to-analysis. | | | | | | | | | | | | |
| Other Project Names | | | | | | | | | | | | | |
| Report Period | June, 2014 (SCIP) | Project Phase | Implementing | | | | | | | | | | |
| Risk Level | On Track | | | | | | | | | | | | |
| Monthly Update | May'14 The management of the project has transitioned to Andrew. Cheryl is working on finalizing the 2013 methodology report. She has provided a draft version to the PIs. They have asked for some additional items that she will work on once she returns from IFDTC. Andrew has been attending the weekly meetings and has begun working on the 2014 survey. | | | | | | | | | | | | |
| | June '14 Cheryl provided a final 2013 methodology report. Andrew attended the weekly meetings with the PIs and a meeting with the campus stakeholders to provide some findings from 2012 and 2013 and have a chance for the stakeholders to provide feedback on the survey (things they may want to add, tweak, etc.). Andrew set-up a separate MPR project for the upcoming 2014 survey to better report and keep track of costs associated with each wave of data collection, rather than have just one MPR for the entire project. There will likely be another monthly report (or two) for this project as things related to the 2013 survey wrap up. Minako has been working on updating the maps and the dataset with the analysis team (largely related to the panel of student participants that we now have. Andrew met with the PIs about making the survey more mobile friendly. Project resources will be invested in adding the mobile style sheet and adding javascript on specific questions to make the survey have a better look and feel on smaller devices. Andrew also met with the PIs about doing something methodological experiments (for methodological reasons and to address issues during the 2013 wave) on the 2014 wave. Andrew will meet with Mick, James and Gregg (who has been looking at past data) to come up with a proposal and bring it back to John and Bob. They (John and Bob) are very | | | | | | | | | | | | |

open to the idea. Brady has been helping advise the graduate student with the panel weights.

Special Issues

| | | |
|-----------------------------|--|--|
| Cost Jun 30, 2014 | Total Cost to Date (Direct + Indirect): | 52,665.12 |
| | Estimated Cost at Completion (E\$AC): | 62,034.95 |
| | Total Budget: | 426,980.00 |
| | Variance (Budget minus E\$AC): | 7,103.05 |
| | Reason For Variance: | Using fiscal year totals for the cost numbers. |

| | | |
|------------------------------------|---|----------|
| Projections Jun 30, 2014 | Dollars Projected For Month: | 5,669.01 |
| | Actual Dollars Used: | 0.00 |
| | Variance (Projected minus Actual): | 0.00 |
| | Reason For Variance: | |

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

Other Measures

| | | | | |
|--------------------------------------|---|----------------------------|----------------------------|-------------------|
| Project Name | The Role of Housing in Healthy Child Development (H&C) | | | |
| Project Mode | Primary: Face to Face | Total of Modes: 1 | | |
| Project Type | Sponsored Projects | Project Status | Current | |
| Budget | Direct Budget: | 543,892.00 | Indirect Budget: | 81,584.00 |
| | | | Total Budget: | 625,476.00 |
| Principal Investigator/Client | Dan Keating (University of Michigan) Sandra Newman (Johns Hopkins University) Tama Leventhal (Tufts University) | | | |
| Funding Agency | MacArthur, HUD, NICHD | | | |
| IRB | HUM#: | 77724 | Period Of Approval: | 7/17/2013-7/16/21 |
| 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: | Grant D Benson | | |

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 Period | 09/2014 - 03/2016 | | |
| Security Plan | No | | |
| 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 Barbara Ward (Proj Lead), Eva Leissou (Surv Dir), Genise Pattullo (Tech Lead), Judi Clemens, (SSS), DonnaLee Grey-Farquharson (SSI), Becky Loomis, Mike Zeddies, Winter Freeman, Alicia Giordimaina (SSAs), Barb Homburg (Prod Mgr Lead), Veronica Connors-Burge (Prod Mgr), Jim Hagerman (Blaise), Holly Ackerman (Weblog/Webtrak), Pam Swanson, Jeff Smith (SurveyTrak), Emily Blasczyk (Data Mgt), Andrea Pierce (Helpdesk)

Other Project Names

| | | | |
|-----------------------|---|----------------------|--------------|
| Report Period | June, 2014 (H&C) | Project Phase | Implementing |
| Risk Level | <i>Attention!</i> | | |
| Monthly Update | Survey Research Operations Housing & Children Monthly Report Period Covered: June 2014 | | |

Prepared by: Barbara Ward, SRO

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

During June 2014, SRO activities included the following:

Task 1: Management, Budget and Work Plan

- Prepared monthly activity and billing reports for May 2014.
- Reviewed and updated spending projections.
- Submitted IRB Continuing Review
- Processed a return of 37 noise meters.

Task 2: Sampling

Task 3: Questionnaire and Protocol Development/Pretest

Task 4: CAI Programming

Task 5: Systems Programming

Task 6: Recruitment & Hiring

Task 7: Training

Task 8: Main Data Collection

Task 9: Post Collection Processing

Task 10: Weighting

Task 11: Final Data Deliverables

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

| | | |
|---------------------------------|----|--------------------|
| Total survey funding available: | \$ | 625,476 |
| Feb activities expensed in May: | \$ | 2,032 |
| Total Expended to Date | \$ | 646,520 |
| Variance: | \$ | (21,044) (overrun) |

Additional March, April & May Costs Incurred In Support

Of the Project and Charged to an SRC

| | | |
|---------|----|---------|
| Account | \$ | 117,355 |
|---------|----|---------|

| | | |
|-----------------------------|----|---------------------|
| Total Variance All Sources: | \$ | (138,399) (overrun) |
|-----------------------------|----|---------------------|

Cost explanation:

The cost estimated above reflects total survey funding available and awarded to Michigan and current expenditures charged through the end of May 2014. May expense on the MacArthur account includes the SO R&D fees that were not previously applied to the study. May expense includes timesheet corrections and effort expended to prepare project deliverables.

37 noise meters were returned to the vendor. This may result in a credit to the MacArthur account. UM appears to have charged the MacArthur account when the check was created, however the check was never mailed to the vendor. The full check amount should be credited, and the MacArthur account charged for 3 noise meters and one calibration device which were opened for testing.

Special Issues

Areas of risk:

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

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

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

Cost
Jun 30, 2014

| | |
|--|------------|
| Total Cost to Date (Direct + Indirect): | 763,875.00 |
|--|------------|

| | |
|--|------------|
| Estimated Cost at Completion (E\$AC): | 767,015.00 |
|--|------------|

| | |
|----------------------|------------|
| Total Budget: | 625,476.00 |
|----------------------|------------|

| | |
|---------------------------------------|------------|
| Variance (Budget minus E\$AC): | 141,539.00 |
|---------------------------------------|------------|

Reason For Variance:

Work scope and funding for the project is being negotiated. SRC continued to work on the project at a low level under the assumption that the project would be funded by the research team. This has not turned out to be the case.

Projections
Jun 30, 2014

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

Measures

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

Other Measures

Project Name Transition to Adulthood (2013) (TA 2013)

Project Mode Primary: Telephone Total of Modes: 1

Project Type Sponsored Projects **Project Status** Current

Budget **Direct Budget:** 441,640.00 **Indirect Budget:** 245,109.00 **Total Budget:** 686,749.00

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

Funding Agency

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

Project Team **Project Lead:** Piotr Dworak
Budget Analyst: William Lokers
Production Manager:
Senior Project Advisor: Stephanie A Chardoul
Production Manager:
Production Manager:

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

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

Project Period 06/2013 - 08/2014 **Proposal No:**

Data Collection Period 10/2013 - 04/2014

Security Plan

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

Other Project Names

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

Risk Level Some Concerns

Monthly Update TA project is closing - data collection needed to be extended by three weeks (until 5/26) from the planned date of 04/30 to maximize the opportunity to reach goals.

In the closing month we announced the end date to Respondents and significantly scaled down data collection operations to rely less on outbound calling and more on emails, text messages, and subsequent call-ins to reach the goal. Despite scaling down, the last few weeks were fairly productive yielding > 30 interviews and bringing us to 89% RR.

In the end, we had reached 89% RR (against the goal of 92%).

TA 2013 collected 1807 interviews from the sample of 2156. This represents 100 interviews less than 2011 (1909 from a sample of 2219). However, 2013 project was much more efficient and ended up costing \$106K less in total and \$72K less in direct costs.

However, with respect to 2013 projections we look to end with the total overrun of \$50K which will require some adjustments to the projected TA 2015 budget.

Special Issues

Cost
May 24, 2014

Total Cost to Date (Direct + Indirect): 661,677.00
Estimated Cost at Completion (E\$AC): 725,612.00
Total Budget: 686,749.00
Variance (Budget minus E\$AC): -50,867.00
Reason For Variance: Increased data collection effort/hours, under-projection of April hours, technical development cost.

Projections
May 24, 2014

Dollars Projected For Month: 63,317.00
Actual Dollars Used: 63,696.00
Variance (Projected minus Actual): -378.00
Reason For Variance: Fluctuations in staffing and hours charged by different type of interviewers (ST I and STII)

Measures

| | Units Complete | RR | HPI |
|------------------------------|-----------------------|-----------|------------|
| Current Goal: | 1865 | 92% | 5.0 |
| Goal at Completion: | 1865 | 92% | 5.00 |
| Current actual: | 1807 | 89% | 6.1 |
| Estimate at Complete: | 1807 | 89% | 6.1 |
| Variance: | 58 | 5% | +1.01 |

Other Measures

Project Name Transitions from Preschool through High School: Family, Schools and Neighborhoods (CDS 2014)

Project Mode Primary: Telephone Secondary: Face to Face Total of Modes: 3

Project Type Sponsored Projects **Project Status** Current

Budget ***Direct Budget:*** 0.00 ***Indirect Budget:*** 0.00 ***Total Budget:*** 0.00

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

Funding Agency National Institute of Child Health and Human Development

IRB ***HUM#:*** HUM00075944 ***Period Of Approval:***

Project Team ***Project Lead:*** Jennifer C Arrieta
Budget Analyst: William Lokers
Production Manager: Dianne G Casey
Senior Project Advisor: Stephanie A Chardoul
Production Manager: Shonda R Kruger-Ndiaye
Production Manager: Maryam N Buageila

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

Data collection will be conducted in a variety of modes (FTF, TEL, MAIL) and will include the following:

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

Project Period 03/2014 - 08/2015

Data Collection Period 10/2014 - 04/2014

Security Plan Yes

Proposal No:

Milestone Dates

PreProduction Start:03/01/2014
Pretest End:08/12/2014
Staffing Completed:09/08/2014
SS Train Start:10/06/2014
DC Start:10/15/2014

Pretest Start:07/22/2014
Recruitment Start:06/01/2014
GIT Start:10/04/2014
SS Train End:10/11/2014
DC End:04/15/2015

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

| | | | |
|----------------------|-----------------------|----------------------|------------|
| Report Period | June, 2014 (CDS 2014) | Project Phase | Initiation |
|----------------------|-----------------------|----------------------|------------|

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|-------------------|----------------------|
| Risk Level | <i>Some Concerns</i> |
|-------------------|----------------------|

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|-----------------------|---|
| Monthly Update | During the month of June, the project manager and survey director joined weekly instrument design meetings with the PI and PSID staff and have been able to assist discussions regarding operationalizing suggested protocols, cost implications, etc. Technical design discussions and development have continued with both SRO and PSID technical team members assuming the full design slated for pretest. Instrument programming, Sample Management Systems programming, CTT testing, and integrated testing continued. Testing focus is on identifying show-stoppers for pretest training and pretest data collection. Additional efforts included preparing for and conducting round 2 of cognitive interviews, pretest training preparation, and production staff recruitment. The IVR vendor delivered the first test version of the IVR instrument. In June, discussions continued with the PI team regarding the formal budget submitted for 50% FTF. |
|-----------------------|---|

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|-----------------------|--|
| Special Issues | <ul style="list-style-type: none"> •The timeline is tight for FTF budget, revisions, and final design decisions in order to implement for an October data collection period. •Questionnaire development is behind schedule although every effort is being made to ensure deliverables are met to maintain current schedule. •The budgeted scope of work requires a short field period while aiming to obtain a high response rate. Obtaining this response rate may require more effort, including a longer data collection period. |
|-----------------------|--|

| | | |
|------------------------------|--|---|
| Cost May 31, 2014 | Total Cost to Date (Direct + Indirect): | 234,094.07 |
| | Estimated Cost at Completion (E\$AC): | 0.00 |
| | Total Budget: | 0.00 |
| | Variance (Budget minus E\$AC): | 0.00 |
| | Reason For Variance: | Final study design and budget still to be determined. |

| | | |
|-------------------------------------|---|---|
| Projections May 31, 2014 | Dollars Projected For Month: | 80,204.20 |
| | Actual Dollars Used: | 69,562.53 |
| | Variance (Projected minus Actual): | 10,641.67 |
| | Reason For Variance: | The team charged a 89 hours less than projected for the month of May and some non-sal items did not hit in May. The hours and non-sal projections will be pushed forward. |

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

Other Measures

| | | | | | | | | | | | | | |
|--------------------------------------|---|------------------------------|---------------------------------|-----------------------------|-----------------------|---------------------|---------------------------|----------------------------|-------------------|------------------------|----------------------|------------------|----------------|
| Project Name | World Health Organization Model Disability Survey (WHO-MDS) | | | | | | | | | | | | |
| Project Mode | Primary: Cognitive IW | | | | | | | | | | | | |
| Project Type | Sponsored Projects | Project Status | Current | | | | | | | | | | |
| Budget | Direct Budget: 120,509.00 | Indirect Budget: 0.00 | Total Budget: 120,509.00 | | | | | | | | | | |
| Principal Investigator/Client | Ting Yan (ISR, SMP) Dr. Somnath Chatterji (World Health Organization) Alarcos Cieza (University of Southampton) | | | | | | | | | | | | |
| Funding Agency | | | | | | | | | | | | | |
| IRB | HUM#: | Period Of Approval: | | | | | | | | | | | |
| Project Team | Project Lead: | Jennifer M Kelley | | | | | | | | | | | |
| | Budget Analyst: | William Lokers | | | | | | | | | | | |
| | Production Manager: | | | | | | | | | | | | |
| | Senior Project Advisor: | Beth-Ellen Pennell | | | | | | | | | | | |
| | Production Manager: | | | | | | | | | | | | |
| | Production Manager: | | | | | | | | | | | | |
| Description: | <p>The purpose of this study is to develop a questionnaire for the World Health Organization Model Disability Survey. Specifically, SRC will develop and conduct a virtual train-the-trainer session for cognitive interviewing in three countries - China, Ghana, and Nepal.</p> <p>Update: A new work scope was added to the project to conduct 60 cognitive interviews locally to test revisions that were implemented after the first round of English cognitive interviews and SRC's expert review.</p> | | | | | | | | | | | | |
| Project Period | 09/2013 - 06/2014 | | Proposal No: | | | | | | | | | | |
| Data Collection Period | | | | | | | | | | | | | |
| Security Plan | | | | | | | | | | | | | |
| Milestone Dates | <table border="1"> <tr> <td>PreProduction Start:</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start:</td> </tr> <tr> <td>Staffing Completed:</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start:</td> <td>SS Train End:</td> </tr> <tr> <td>DC Start:</td> <td>DC End:</td> </tr> </table> | | | PreProduction Start: | Pretest Start: | Pretest End: | Recruitment Start: | Staffing Completed: | GIT Start: | SS Train Start: | SS Train End: | DC Start: | DC End: |
| PreProduction Start: | Pretest Start: | | | | | | | | | | | | |
| Pretest End: | Recruitment Start: | | | | | | | | | | | | |
| Staffing Completed: | GIT Start: | | | | | | | | | | | | |
| SS Train Start: | SS Train End: | | | | | | | | | | | | |
| DC Start: | DC End: | | | | | | | | | | | | |
| Other Project Team Members | Lisa Carn, Production Manager for local cognitive interviews | | | | | | | | | | | | |
| Other Project Names | | | | | | | | | | | | | |
| Report Period | June, 2014 (WHO-MDS) | Project Phase | Implementing | | | | | | | | | | |
| Risk Level | On Track | | | | | | | | | | | | |
| Monthly Update | <p>Cognitive interviews wrapped up the first week of June and coding and analysis work has begun. A preliminary report will be delivered to WHO on July 1, 2014. The final and executive report will be delivered mid July.</p> <p>Jennifer Kelley will be traveling to Nepal in at the end of July to conduct training and oversee data collection for 40 respondents at ISER-Nepal. Kristen Cibelli will also be traveling to Nepal to help with training. Ting Yan will be traveling to China in July/August to oversee the China cog testing.</p> | | | | | | | | | | | | |
| Special Issues | | | | | | | | | | | | | |
| Cost | | | | | | | | | | | | | |
| Jun 19, 2014 | Total Cost to Date (Direct + Indirect): | 86,885.30 | | | | | | | | | | | |
| | Estimated Cost at Completion (E\$AC): | 99,867.40 | | | | | | | | | | | |
| | Total Budget: | 120,509.00 | | | | | | | | | | | |
| | Variance (Budget minus E\$AC): | 20,641.60 | | | | | | | | | | | |
| | Reason For Variance: | | | | | | | | | | | | |
| Projections | | | | | | | | | | | | | |
| Jun 19, 2014 | Dollars Projected For Month: | 0.00 | | | | | | | | | | | |
| | Actual Dollars Used: | 0.00 | | | | | | | | | | | |
| | Variance (Projected minus Actual): | 0.00 | | | | | | | | | | | |
| | Reason For Variance: | | | | | | | | | | | | |

Measures

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

Other Measures