Survey Research Operations

Monthly Project Report

Sponsored Projects

May 2013

Sponsored Projects

(CogUSA Supp) NGCS Supplement to Cognition and Aging in the USA
(DUST II 2013) Health and Daily Life
(HealthDisp) Health Disparities
(HRS 2012) Health and Retirement Study
(HRS Internet 2013) HRS Internet 2013
(HRS Screening Initiative) HRS Screening Initiative
(IMDU) Intensive Measurement of Drug Use during Transition to Adulthood
(iPhone) Responding to Surveys on Mobile Multimodal Devices
(MCEE) Michigan Council on Educator Effectiveness
(MDRC) MDRC - Reading Partners Program Evaluation Project
(MTF-WPSP) Monitoring the Future Web Programming and Survey Pilot
(PSID 2013) Panel Study of Income Dynamics 2013 (Family Economics Study)
(Transcript Study) Impact of the Michigan Merit Curriculum & Michigan Promise Scholarship on Studen
(UMCOP Alum Study) UM College of Pharmacy Alumni Study

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

Project Team

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

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

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

Data Collection 06/2013 - 01/2014

Milestone Dates

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

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

Report Period May, 2013 (DUST II 2013) **Project Phase** Planning

Monthly Update In the month of May the development of the technical tools needed for the project continued in preparation for Production training and data collection start in June. SSL continued recruitment for its staffing needs for the Production phase of the project. Production training materials were prepared. Regular meetings between the PI and the Survey Director were held.

Special Issues

Cost
May 31, 2013

Total Cost to Date (Direct + Indirect):	241,525.21
Estimated Cost at Completion	1,204,227.00
Total Budget:	1,204,227.00
Variance (Budget minus E$AC):	0.00

Measures

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

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

Project Name Health and Retirement Study (HRS 2012)

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

Project Type Sponsored Projects **Project Status** Current

Budget ***Direct Budget:*** 13,160,794.00 ***InDirect Budget:*** 4,737,885.00 ***Total Budget:*** 17,898,679.00

Principal Investigator/Client
David Weir (UM, ISR, SRC)
Mary Beth Ofstedal (UM, ISR, SRC)
Kenneth Langa (UM, ISR, SRC)

Project Team

Project Lead:	Heidi Marie Guyer
Budget Analyst:	Jeffrey Keeler
Production Manager:	Stephanie Sullivan
Senior Project Advisor:	Mary P Maher
Production Manager:	Rebecca Gatward
Production Manager:	Robert Lee

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

Project Period 08/2011 - 04/2012 **Proposal No:** 12-0044
Data Collection 04/2012 - 02/2013

Milestone Dates

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

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

Report Period May, 2013 (HRS 2012) **Project Phase** Closing

Monthly Update Interviewing closed in April. SAQ follow-ups continued throughout the month. Some final deliverables were prepared and delivered, others were worked on.

Special Issues

Cost May 31, 2013

Total Cost to Date (Direct + Indirect):	17,989,227.14
Estimated Cost at Completion	18,022,824.19
Total Budget:	17,898,679.00
Variance (Budget minus E$AC):	-124,145.19

Measures

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

Other Measures

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

Project Team

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

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

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

Milestone Dates

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

Other Project Team Members Marta Murray Close, Paul Schulz

Report Period May, 2013 (HealthDisp)   **Project Phase** Implementing

Monthly Update

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

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

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

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

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

July '12
Paul has most of the instrument programmed. There are a few remaining items that need to be fixed. Once those items work, Paul will begin working on the follow-up instruments. Stephanie C. has been working with the client on all

of the scope changes and getting more funds from them. They have agreed to provide more funds, but they are awaiting all of the funds from SPH.

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

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

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

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

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

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

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

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

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

Special Issues

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

Cost
May 31, 2013

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

Measures

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

Other Measures

Project Name HRS Internet 2013 (HRS Internet 2013)

Project Mode Primary: Web Total of Modes: 1

Project Type Sponsored Projects **Project Status** Current

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

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

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

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

Project Period 03/2013 - 08/2013 **Proposal No:** 13-PAF05070
Data Collection 04/2013 - 07/2013

Milestone Dates

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

Important Project Dates

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

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

Report Period May, 2013 (HRS Internet 2013) **Project Phase** Implementing

Monthly Update On May 15th the initial invitation mailing was sent to 7544 sample. Production started within two days of the mailing. By the end of the month there were 2467 surveys completed on the production sample and 128 pilot interviews. This is only slightly behind previous waves of data collection.

There were 2 pilot reminder letters sent in May and one Production reminder letter sent in May.

Special Issues

The new panel members screened in HRS 2010/2011 have been slower to respond. The EBB cohort also is slower and less robust in response. We will be closely watching these cohorts for negative impact on response and budget since they may drive up our reminder mailing rates.
There were 2 new data models released during May. May 15th and 31st. On May 8th a new participant list was attached to the survey. It was unknown at the time but these changes caused replication errors in the system.

Cost
May 31, 2013

Total Cost to Date (Direct + Indirect):	344,094.83
Estimated Cost at Completion	373,003.11
Total Budget:	400,933.00
Variance (Budget minus E$AC):	373,003.11

Measures

	Units Complete	RR	HPI
Current Goal:	2840	37%	NA
Goal at Completion:	5808	75%	
Current actual:	2595	34%	NA
Estimate at Complete:	5808	75%	
Variance:	2	1%	

Other Measures

Project Name HRS Screening Initiative (HRS Screening Initiative)

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

Project Type Sponsored Projects **Project Status** Current

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

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

Project Team

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

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

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

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

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

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

Project Period 09/2012 - 12/2014 **Proposal No:** SRO # 11-0010R01
Data Collection 08/2013 - 11/2013

Milestone Dates

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

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

Report Period May, 2013 (HRS Screening **Project Phase** Planning
Monthly Update March updated by task:

2013 Screening Experiment

Sample Design
June
Selected the three tracts in which we will collect data. Learn from HRS PIs that age eligible persons who are partnered with a person who is in an older HRS age cohort range will NOT be eligible for the HRS in this experiment or in 2016. This is very good to know because we assumed the opposite, given the procedures from the HRS 2010/11 screening.

May
Decide to make each of the 9 segments a Census Tract. 3 Census tracts within each PSU. Each PSU is a separate county (Dallas County, LA County, Denver County)

SurveyTrak and Blaise Specs

June
Received first test versions of both the Blaise and SurveyTrak instruments. Frost Hubbard tested extensively. Others will test more extensively in July while Frost is on vacation.

May
Continued working with M. Skoman on SurveyTrak specs. Began honing in on how to revise the Blaise screening questionnaire to make it shorter as well as reduce the number of HU obs and contact obs

April
Continued working with M. Skoman on SurveyTrak specs

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

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

Budget
May
Continued to meet with Rick Krause and Heidi Guyer to review budget specs. Continue to tweak budget by revising interviewer hours as necessary based on more concrete sample design.

April
Brought Heidi Guyer in to help with budget estimates. Meet with separate TSG staff to get estimated of hours needed

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

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

Obtaining DMV lists

June
David Weir following up with UM General Counsel to see if we meet any of the DPPA exceptions - (1) are we working on behalf of UM, a state agency and (2) can we say that we will not use this information to contact anyone, only as a stratification variable in our sampling design.

May
DMV lists look dead in the water after finding out that NIA will not write us a letter saying we are working behalf of their agency. It does not look promising that we will meet any of the exceptions to the Driver's Privacy Proctection Act that will help us get access to the DMV lists from the states

April

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

Commercial Data Exploration with the Census Bureau
June
Wen Chang made a few other revisions to the file to send to the Census Bureau based on suggestions from S. Lee. Still waiting on the confidentiality agreement which seems to be in the hands of the Bureau at this point.

May
Came up with what we felt was a final version to send to the Census Bureau.
Waiting to hear back from UM OSRP regarding a confidentiality agreeement with the CB.

April
With Wen Chang's help, revised the file we will present to the Census Bureau. Continued to clarify the spec to the Census Bureau with Sunghee Lee's help.

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

Other commercial sources (Aristotle and Valassis)

Aristotle
June
Preliminary analyses show that Aristotle data is not more than MSG data for eligibility models for eligibility prediction prior to data collection. Analyses also show that commercial data of any sort not much more helpful than iwer observations for eligibility prediction for 2nd phase.

May
Preliminary analyses ongoing by Haley Gu with Brady West and James Wagner's oversight

April
Received and processed the data as well as began preliminary analyses

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

Valassis
June
1. Purchase and received data for NSFG Q9 listing from Valassis. Turns out Valassis doesn't provide any commercial data at the HH level, only the carrier route level. This is supremely disappointing since we want the commercial data at the HH level and not carrier route.

May
1. Continued talks with reps at Valassis and spoke in person at AAPOR conference

April
1. Began talks with reps at Valassis

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

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

AARP
June
Nothing new here for June

May

Met with John Fries at AAPOR along with Sunghee Lee and Piotr Dworak. Learned that AARP does similar things to ourselves and that they use Merck for HH level commercial data. May try them in the future.

April
Plans to meet with John Fries, an AARP representative at AAPOR

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

LBB Tracking Experiment:
June
Brought up the idea of including 1/3 of LBB persons we are tracking in an HRS ancillary study at an HRS exec meeting. The HRS PIs did not make any definitive decision on this and we will have to raise this again in the future. Still no calls to the 800 lines with complaints, which is good.

April and May
No new news

March
From 2013-2016, we will be carrying out an ongoing tracking experiment with the following three arms for LBBs that were identified during the HRS 2010/11 screening project:
1. Passively track the location of identified LBBs through Accurint, a commercial data source with which UM has a pre-existing work agreement.
2. Passively track and send the LBB a yearly newsletter at the best known address
3. Passively track, send a yearly newsletter and invite the LBB to participate in an ancillary HRS study.

The statistics we will measure are:
1. In 2016, we will measure the location rate of each of the three groups

2. Prior to 2016, we can measure
   a. % of lines that received the newsletter that call into the 800 number for more information or to complain
   b. % of lines where newsletter bounced back from an incorrect address.

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

Special Issues

Cost
May 31, 2013

Total Cost to Date (Direct + Indirect):	114,000.02
Estimated Cost at Completion	653,407.53
Total Budget:	0.00
Variance (Budget minus E$AC):	43,528.47

Measures

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

Other Measures

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

Project Mode Primary: Data Processing Secondary: Not Available

Project Type Sponsored Projects **Project Status** Current

Budget ***Direct Budget:*** 72,443.00 ***InDirect Budget:*** 39,481.00 ***Total Budget:*** 111,924.00

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

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

Production Manager:	
Senior Project Advisor:	Heidi Marie Guyer
Production Manager:	
Production Manager:	Donnalee Ann Grey-Farquharson

Description:

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

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

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

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

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

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

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

Project Period 06/2012 - 12/2012 **Proposal No:**

Data Collection 08/2012 - 12/2012

Milestone Dates

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

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

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

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

Special Issues

Cost
Jun 30, 2013

Total Cost to Date (Direct + Indirect):	264,825.24
Estimated Cost at Completion	273,702.57
Total Budget:	111,924.00
Variance (Budget minus E$AC):	-161,778.57

Measures

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

Other Measures

Project Name	Intensive Measurement of Drug Use during Transition to Adulthood (IMDU)
Project Mode	Primary: Web Secondary: Mail
Project Type	Sponsored Projects **Project Status** Current
Budget	***Direct Budget:*** 103,117.00 ***InDirect Budget:*** 57,584.00 ***Total Budget:*** 160,701.00
Principal Investigator/Client	Megan Patrick (ISR)

Project Team

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

Description:

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

Project Period 02/2012 - 07/2013   **Proposal No:** 10-0050R02
Data Collection 05/2012 - 06/2013

Milestone Dates

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

Other Project Team Members Minako Edgars, Rebecca Loomis

Report Period May, 2013 (IMDU)   **Project Phase** Implementing

Monthly Update

During May data collection for Wave 3 of IMDU started on 5/13/13. By 5/31 57 (.29RR) surveys by the intensive group, and 29 (.30RR) by the control group had been completed. This is the first wave the control group was included in a web survey. The P.I. had requested we start the wave with calling attempts to those without emails and bounced emails. We also reviewed sample from W1 and W2 and began tracking non-responders. Our overall response rate of .30 at this point of the Wave was ahead of previous waves (where it had been at .24RR by the 19th day of administration). The P.I. is aware that these calling efforts were not included in the orginal budget and will work with us to cover these costs if they are projected to exceed the budget.

Special Issues

Working with very tight budget, minimal sample management system and request to add non-response calling to project. I am monitoring the budget very closely in order to stay within budget or to request more funds from PI if needed.

Cost May 31, 2013

Total Cost to Date (Direct + Indirect):	130,161.76
Estimated Cost at Completion	159,147.17
Total Budget:	160,701.00
Variance (Budget minus E$AC):	754.83

Measures

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

Other Measures

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

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

Project Type Sponsored Projects **Project Status** Current

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

Principal Investigator/Client Robin Jacob (EWB)

Project Team

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

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

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

Milestone Dates

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

Other Project Team Members
Becky Loomis
Jessica Huff
Rachel Rifkin

Report Period May, 2013 (MDRC) **Project Phase** Implementing

Monthly Update May was the project's main data collection period for spring 2013. We piloted the spring procedures and protocols at a single school in the first week, and completed 15 school admins during the next 3 weeks.

Special Issues

Cost May 31, 2013

Total Cost to Date (Direct + Indirect):	529,916.42
Estimated Cost at Completion	727,362.52
Total Budget:	734,890.00
Variance (Budget minus E$AC):	-7,527.47

Measures

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

Other Measures Teacher survey Response Rate = 80%

Project Name	Michigan Council on Educator Effectiveness (MCEE)
Project Mode	Primary: Mixed Secondary: Observation Total of Modes: 3
Project Type	Sponsored Projects **Project Status** Current
Budget	***Direct Budget:*** 0.00 ***InDirect Budget:*** 0.00 ***Total Budget:*** 4,900,000.00
Principal Investigator/Client	Brian Rowan (U of M: Education and Well Being and SOE)

Project Team

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

Description:

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

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

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

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

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

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

Project Period	08/2012 - 06/2013	**Proposal No:**	13-0007
Data Collection	08/2012 - 05/2013		

Milestone Dates

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

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

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

Monthly Update

- ISR staff continued with the student-teacher rostering pilot, collecting final roster data from the selected teachers and principals in each district. As teachers and principals finished their rostering task, they were sent a brief web survey to share more about their experience with the rostering system.
- In parallel with the rostering pilot, ISR continued to collect updated roster and course information from each district, now obtaining third trimester and second semester final data. ISR data processing staff are putting lots of effort into cleaning these data, reconciling inconsistencies, and putting everything in a final format that can be used for analyses, including VAM calculations.
- The ISR school researchers completed the final paired teacher observations. As of May 16, a total of 696 sessions were completed by the school researchers.
- ISR data processing staff worked with each of the four observation vendors (and, in some cases, the additional vendors who supply the observation technical systems) to finalize the format of the observation data sets and secure access to all observation rating data (for both the paired observations done with the ISR school researchers and the observations completed by just the principals). We continued with review and cleaning of the observation data, and instructed the administrators in all districts to have their ratings entered for all observation sessions by May 10.
- We implemented the spring testing in all districts, completing the final (third) round of NWEA for grades K-6, the post-test of EXPLORE for grades 7-8, the post-test of PLAN for grades 9-10, and the ACT (either college-reportable or practice) for grade 12 (11th graders all completed their standard MME testing, and that will be used as their Pilot post-test). Many districts did not comply with the standard Pilot spring testing regime, refusing especially to test their 12th graders.
- We continued to keep the selected VAM vendors updated on progress. All MOUs for the VAM work have been signed, we are now waiting for data from MDE and CEPI to deliver to the vendors (using the already-established SFTP sites).
- In June, we received data from the State for the Pilot work, which included MEAP, 2012 MME, and student and teacher demographic files. We have not yet received the 2013 MME files. We are working with them to clarify file formats and structure.
- We received the full set of student assessment data (3 rounds) from NWEA, with complete documentation.
- We received the spring student testing data from ACT (ACT practice, ACT project, EXPLORE, and PLAN) and began the process of formatting the files for analysis. The ACT data also requires a significant amount of “student matching”, since the data does not have UIC attached. ISR’s data processing staff is using UIC local student ID maps that we obtained from most districts, and also is manually matching on student name and birth date.
- The Pilot team continued to contact districts and conduct qualitative interviews (via phone) collecting information on their current implementation of teacher evaluations – including how they incorporate data from observations and student growth measures.
- The Pilot team completed three focus groups – one for principals, one for core subject teachers, and one for non-core subject teachers – to explore various costs associated with teacher evaluation, and prepared a final report on the groups.
- On May 14, we launched a web survey to all Pilot district teachers (2530), requesting their feedback on the evaluation process. We expect to finish this data collection in early July.
- We developed and programmed a web survey to be administered to all Pilot district principals and assistant principals. We expect to launch this data collection in early July.

Special Issues

Cost May 31, 2013

Total Cost to Date (Direct + Indirect):	2,476,811.44
Estimated Cost at Completion	3,623,922.53
Total Budget:	4,900,000.00
Variance (Budget minus E$AC):	1,276,077.47

Measures

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

Other Measures

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

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

Project Type	Sponsored Projects		**Project Status**	Current	
Budget	***Direct Budget:*** 45,405.00	***InDirect Budget:*** 81,809.00		***Total Budget:*** 127,214.00	
Principal Investigator/Client	Megan Patrick (UM-SRC)				

Project Team

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

Description:

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

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

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

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

Project Period	08/2012 - 04/2017	**Proposal No:**	12-0003R04
Data Collection	01/2014 - 08/2017		

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

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Report Period	May, 2013 (MTF-WPSP)	**Project Phase**	Implementing
Monthly Update	Programming continues for both the Illume and RLM portion of the project.		

Special Issues

Cost
May 31, 2013

Total Cost to Date (Direct + Indirect):	31,386.95
Estimated Cost at Completion	225,790.10
Total Budget:	127,214.00
Variance (Budget minus E$AC):	-225,790.10

Measures

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

Other Measures

Project Name NGCS Supplement to Cognition and Aging in the USA (CogUSA Supp)

Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	***Direct Budget:*** 98,863.00 ***InDirect Budget:*** 53,880.00 ***Total Budget:*** 152,743.00
Principal Investigator/Client	

Project Team

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

Description:

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

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

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

Milestone Dates

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

Other Project Team Members

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

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Report Period May, 2013 (CogUSA Supp) **Project Phase** Implementing

Monthly Update

In May the web portion of the Supplement continued from its start in April. By the end of May 164 web interviews had been completed (.37RR). Plans were made to train phone interviewers in June when the remaining sample would be switched to phone interviews. The budget currently projects an underrun, primarily due to less programming needed than anticipated and ZoAnne's medical leave.

Special Issues

Cost
May 31, 2013

Total Cost to Date (Direct + Indirect):	91,375.88
Estimated Cost at Completion	171,721.60
Total Budget:	152,743.00
Variance (Budget minus E$AC):	11,219.88

Measures

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

Other Measures

Project Name	Panel Study of Income Dynamics 2013 (Family Economics Study) (PSID 2013)
Project Mode	Primary: Telephone Secondary: Face to Face Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	***Direct Budget:*** 3,238,350.00 ***InDirect Budget:*** 1,797,280.00 ***Total Budget:*** 5,035,630.00

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

Project Team

Project Lead:	Shonda R Kruger-Ndiaye
Budget Analyst:	William Lokers
Production Manager:	Sara D Freeland
Senior Project Advisor:	Stephanie A Chardoul
Production Manager:	_UnAssigned
Production Manager:	Jennifer C Arrieta

Description:

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

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

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

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

Project Period	04/2012 - 03/2014	**Proposal No:**	SO # 10-0056
Data Collection	03/2013 - 12/2013		

Milestone Dates

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

Other Project Team Members

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

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

Monthly Update

May work included:
- Release of production DM3 (incl. Spanish) and a STrak update.
- On-going Production Monitoring
  - o Increasingly sophisticated analysis of iw length
  - o Evaluation of progress against goals—Week 9 (5/5) marked the start of challenges in both iwers hours worked and in meeting weekly targets.
  - o Consolidation of Iwers and reassignment of sample to keep strongest iwers efficient
- On-going Budget Monitoring
- Discuss possible protocol adjustments to address Recon RR challenges
  - o e.g. use of e-mail contact?

Special Issues

Cost
May 31, 2013

Total Cost to Date (Direct + Indirect):	2,718,105.76
Estimated Cost at Completion	5,088,571.38
Total Budget:	5,035,630.00
Variance (Budget minus E$AC):	-52,942.38

Measures

	Units Complete	RR	HPI
Current Goal:	5,564		4.89
Goal at Completion:	9,470	94% overall	5.8
Current actual:	5,915	79%	4.51
Estimate at Complete:	9,470	94% overall	5.8
Variance:	0	0	0

Other Measures Note: Completes, RR and HPI are through week 12 (6/1/2013). HPI is Cumulative Production HPI.

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

Project Mode Primary: Mixed Total of Modes: 3

Project Type Sponsored Projects **Project Status** Current

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

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

Project Team

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

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

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

Milestone Dates

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

September '12
Data collection for experiment two concluded in September. Things went smoothly. A debriefing was held with the PIs and the interviewing staff at the end of the month. The interviewing staff provided insight to how this worked and things the researchers needed to think about.

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

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

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

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

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

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

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

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

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

Special Issues

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

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

Cost
May 31, 2013

Total Cost to Date (Direct + Indirect):	176,776.88
Estimated Cost at Completion	221,606.79
Total Budget:	221,976.00
Variance (Budget minus E$AC):	369.21

Measures

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

Other Measures

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

Project Mode Primary: Web

Project Type Sponsored Projects **Project Status** Current

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

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

Project Team

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

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

Project Period 12/2012 - 06/2013 **Proposal No:** 13-0005R01
Data Collection 02/2013 - 05/2013

Milestone Dates

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

Other Project Team Members

Report Period May, 2013 (UMCOP Alum Study) **Project Phase** Implementing

Monthly Update In May SSL interviewers conducted follow-up calling of the sample who had not yet started their online updates. Dave Dybicki created SMS coversheets which helped tremendously with delivery of these calls. By the end of May 1810 alumni updates had been completed, 518 partials were completed (this was the goal of the SSL calling, to update the contact information online, thus a "partial" complete). These totals represented an overall RR of .60.

Special Issues

Cost
May 31, 2013

Total Cost to Date (Direct + Indirect):	36,536.16
Estimated Cost at Completion	45,416.49
Total Budget:	47,765.00
Variance (Budget minus E$AC):	2,348.51

Measures

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

Other Measures