

# ***Survey Research Operations***

## ***Monthly Project Report***

### ***Sponsored Projects***

***August 2019***



## Sponsored Projects

(AFHS) *American Family Health Study*  
 (ACL6) *Americans' Changing Lives - Wave 6*  
 (A-STARRS LS) *Army Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study*  
 (BFY) *Baby's First Years*  
 (C.A.R.E.) *Concussion Assessment, Research and Education (CARE) Consortium*  
 (ED-Stars Continuation) *Emergency Department Study to Assess Risk of Suicide - Continuation Project*  
 (ECHO) *Environmental Influences on Child Health Outcomes*  
 (EDCPE) *Every Dollar Counts Program Evaluation*  
 (HRS 2018) *Health and Retirement Study 2018*  
 (HRS 2020) *Health and Retirement Study 2020*  
 (H&WB) *Health and Wellbeing in Southeast Michigan*  
 (HCDC, H&C) *Housing & Children*  
 (HRS Actigraphy Pilot) *HRS 2019 Actigraphy Pilot*  
 (CAMS 2019) *HRS 2019 Consumption and Activity Mail Study*  
 (HRS - LHMS 2019) *HRS Enhancing Retrospective Life History Data 2019*  
 (HRS-Neuro) *HRS Neuroimaging Pilot*  
 (OYMS 2019) *HRS Off Year Mail Survey 2019*  
 (IHDS3) *India Human Development Survey Wave 3*  
 (MTF Web 2019) *Monitoring the Future 2019 web*  
 (NDIC DMAS) *National Data Innovation Centre -- Delhi Metropolitan Area Study*  
 (NSFG 2010-2020) *National Survey of Family Growth*  
 (WMH-Qatar) *Qatar World Mental Health Survey*  
 (SWEL) *Stress and Wellbeing in Everyday Life*  
 (SCA 2019) *Surveys of Consumer Attitudes*  
 (VCT) *Video Communication Technologies in Survey Data Collection*

Project Name	American Family Health Study (AFHS)				
Project Mode	Primary: Web	Secondary: Mail	Total of Modes: 3		
Project Type	Sponsored Projects			Project Status	Current
Budget	Direct Budget:	1,596,238.00	Indirect Budget:	893,875.00	Total Budget: 2,490,133.00
Principal Investigator/Client	Brady West (Survey Research Center) William Axinn, Mick Couper and James Wagner (Survey Research Center)				
Funding Agency	National Institutes of Health (NIH)				
IRB	HUM#:		Period Of Approval:		
Project Team	Project Lead:		Rebecca Gatward		
	Budget Analyst:		Dean E Stevens		
	Production Manager:		Derek Dubuque		
	Senior Project Advisor:		Grant D Benson		
	Production Manager:				
	Production Manager:				

**Proposal #:** no data

**Description:**

The American Family Health Study is a methodological project which aims to evaluate the feasibility of collecting national family, fertility and reproductive health data on a nationally-representative sample using a self-administered mode that is comparable to data collected with an in-person (interviewer-administered) study.

We plan to screen around 42,120 randomly selected U.S. households by mail and web to identify an eligible population (aged 18-49 years). The screening work will be divided across two successive nine month periods (n=21,060 per effort). Each 'replicate' is a fully representative sample of U.S. households. Eligible respondents will be invited to complete three modules of content (administered separately or one instrument), either online or a paper questionnaire. The plan is obtain at least one returned module from 4,000 respondents.

There will be a two month gap between replicates. The first replicate will begin in September 2019 and the second in around July 2020.

The sample (addresses) will be selected via Market Systems Group (MSG). The following response assumptions have been made: at the screening stage, we estimate a response rate of 50% (around 21,000). Of these we expect approximately 12,000 addresses to contain an eligible person. In households with more than one eligible person we will randomly select one person.

The contact protocol for the screener and main data collection is designed to, initially, push completion by web. Addresses or selected participants will only be mailed a paper screener or questionnaire after reminders encouraging completion online. This is a recent change to the protocol and was made after the SRO budget proposal was provided to the PI.

The main interview consists of three modules which will replicate almost all NSFG content. The PI group is leading the process of reviewing and translating the content to web format and will provide specifications for programming to SRO.

The following revisions have been made to the study design as detailed in the latest budget proposal (SRO scope of work);

- o We will use an external vendor to scan returned paper screeners, rather than manual data entry. This vendor will also format the paper forms, print materials and be responsible for most of the respondent mailings.
- o The original study design did not include web as a mode of data collection for screening. Additional funding from SRC has been obtained by the Principal Investigator to cover the development of a web screener and associated data management and reporting costs.
- o Telephone reminder calls remains one of the steps in the non-response protocol for the main data collection. However, it is likely that this effort will be targeted to a subset of the selected sample, rather than across the entire sample.
- o The amount budgeted for the TOA for the screener was \$2 and \$5 – 50% of the sample to receive each amount. The TOA amount will now be \$2 for the full sample. We may provide an additional TOA of \$5 to a subset of the non-responders as part of one of the follow-up reminder mailings (depending on available budget).
- o The eligibility age range for the study has been changed from 15-49 to 18-49. This eliminates the need to contact to parents/guardians of all eligible respondents who have not reached the age of majority to gain consent to participate in the study. There are three states where the age of majority is above 18 years of age – in these states we will adjust the selection protocol as necessary.
- o A further change to the study protocol is around completion of the main modules. In some circumstances we will provide Respondents the option to move directly to complete the main modules after completing the screener without being sent an invite in the mail/email to do so. This will only happen if the selected R is also the person who completed the screener.
- o An experiment around completion of the modules has been introduced to the protocol. Twenty per cent of the

selected eligible respondents will be invited to complete the full 60 minute survey as one instrument, rather than completing three separate modules.

**SRO Project Period** 01/2019 - 10/2021  
**Data Col Period** 09/2019 - 03/2021  
**Security Plan** NA  
**Milestone Dates**

**PreProduction Start:** 05/03/2019

**Pretest End:**

**Staffing Completed:**

**SS Train Start:**

**DC Start:** 01/21/2020

**Pretest Start:**

**Recruitment Start:**

**GIT Start:**

**SS Train End:**

**DC End:** 10/31/2021

**Other Project Team Members:** SRO Team: Leah Roberts, Qi Zhu, Laura Yoder, Jim Rodgers

**Other Project Names:** During the budget proposal stage this project was known as 'A More Efficient Web-Based Approach to Collecting National Family, Fertility and Reproductive Health Data'.

**Sample Mgmt Sys** MSMS

**Data Col Tool** Blaise 5; SAQ

**Hardware** Desktop

**DE Software** Other (Blaise 5 (for Mail questionnaires)); External vendor (TBD)

**QC Recording Tool** N/A

**Incentive** Yes, R

**Administration** SRO Group

**Payment Type** Check, post (Modules 1 - \$20, Module 2 - \$20 and Module 3 - \$30); Cash, prepaid (Screener IW - \$2 Potentially

**Payment Method** Check through STrak RPay System; Check through other system (Info. from MSMS and transfer information via

**Report Period** Aug, 2019 (AFHS) **Project Phase** Planning

**Risk Level** Some Concerns

**Monthly Update**

- PI group finalised the review of NSFG CRQs to determine content for the main questionnaire - we received the final section content (English) on 8/18.
- Blaise programming continues - PIs are reacting quickly to any routing or other questions about the specifications.
- We had finalised awarding the contract for formatting, printing and mailing to DataForce - then we were asked to complete a Sole Source Justification. We were told that work on the contract could continue. The SSJ was sent to the SRC Directors Office and then Procurement were asked to notify DataForce to stop any work. We are awaiting a resolution so we can make progress.
- Translation has begun - we may have to find an alternative resource for this work due to change in schedule.
- The IRB submission is almost final - the main items outstanding are translated materials.
- SRO focus for the coming month will be; Testing, developing the web survey portal, begin working with the vendor on formatting the web screener and continue to write the MSMS task rules.
- Rescheduling the start date - after discussion with the PI group we have decided to begin production in January 2020. We will continue to commit resources now (while they are available) to programming and testing.

**Special Issues** \*Additional funding (AFHS Supplement) for web screener development provided by SRC - Actuals (7/30) \$13,977.14, Projected (7/30) (total \$18,200.87 projected, budget amount \$18,609.00, variance \$408.13 )

**Cost** **Total Cost to Date (Direct + Indirect):** 52,466.38

**Aug 15, 2019** **Estimated Cost at Completion (E\$AC):** 2,028,722.07

**Total Budget:** 2,490,133.00

**Variance (Budget minus E\$AC):** 461,411.00

**Reason For Variance:**

Costs for work that will be included in the DataForce contract have been removed so final costs should be closer to realistic costs - I need to review Survey Tech and IWER hours to ensure I have projected sufficient hours to complete the data entry work and nonR phone follow up.

**Projections** **Dollars Projected For Month:** 62,098.77

**Aug 15, 2019** **Actual Dollars Used:** 16,588.29

**Variance (Projected minus Actual):** 45,510.48

**Reason For Variance:**

Hours/costs need to be re profiled again to reflect change in schedule .

Measures	Units Complete	RR	HPI
<b>Current Goal:</b>	42,120 screened		NA
<b>Goal at Completion:</b>			
<b>Current actual:</b>	NA		NA
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

**Other Measures**

- Screener response rate = 50% (n=21,000) of these, 12,000 households will include an eligible respondent.
- Oversamples: Women =55% of sample, Teens (18-19) =7.3%, Blacks=20% and Hispanics=20%.
- At the main data collection stage we plan to obtain at least one completed module from 4,000 respondents (RR=33.3%) .

<b>Project Name</b>	Americans' Changing Lives - Wave 6 (ACL6)			
<b>Project Mode</b>	Primary: Telephone	Secondary: Face to Face	Total of Modes: 2	
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current
<b>Budget</b>	<b>Direct Budget:</b>	462,919.00	<b>Indirect Budget:</b>	259,234.00
			<b>Total Budget:</b>	722,153.00
<b>Principal Investigator/Client</b>	Margaret Hicken (University of Michigan, SRC - SEH)			
<b>Funding Agency</b>	National Institutes of Health, National Institute on Aging			
<b>IRB</b>	<b>HUM#:</b>	HUM00153243	<b>Period Of Approval:</b>	Pending
<b>Project Team</b>	<b>Project Lead:</b>	Terri Ann Ridenour		
	<b>Budget Analyst:</b>	Grace Tison		
	<b>Production Manager:</b>	Lisa J Carn		
	<b>Senior Project Advisor:</b>	Shonda R Kruger-Ndiaye		
	<b>Production Manager:</b>			
	<b>Production Manager:</b>	James Koopman		

**Proposal #:** no data

**Description:** Led by Dr. Maggie Hicken, ACL6 will build on 5 waves (25 years) of data from the nationally-representative Americans' Changing Lives (ACL) study by adding a 6th wave of data collection (ACL6), along with blood collection for DNA methylation analysis. With ACL6, there will be data for over 30 years of neighborhood chemical and non-chemical stressors experienced cumulatively over adulthood, which the investigators will link to DNA methylation and then examine the impact on healthy aging. The objective of ACL6 is to identify underlying epigenomic mechanisms linking racial residential segregation to key markers of healthy aging, for which there are known inequalities.

The ACL6 project period began in July of 2018, with SRO involvement starting in September of 2018. The data collection period is April to August 2019.

SRO's work scope includes survey data collection and Home Visit coordination. SRO will build systems that: 1) equip SSL interviewers (and potential low-level field interviewers at the end of the study) with tools to conduct survey data collection and sample management; 2) provide a basic mechanism (i.e. Weblog) for the Study Coordinator to log written consent received for the Home Visit, log specimen chain of custody and support SSL follow up efforts (reminder call outcomes); 3) support SRO coordination between the Core Study Team (CST), ExamOne, the 3rd party vendor responsible for Home Visit (health assessment, blood sample collection and health-related measurements), and CLASS lab biorepository; and 4) serve basic reporting needs to provide regular progress updates during the production period.

There is a broad overlap with the ACL5 study with about 15% of the questionnaire requiring revisions and additional items for Wave 6. SRO is responsible for the documentation for the complete ACL6 instrument, programming specifications in Blaise 4.8, developing SurveyTrak sample management system for use in the SSL, building the Weblog interface and creating Reports.

The Core Study Team (CST) conducted locating procedures and updated sample records with information about deceased members, prior to delivery of sample to SRO. Newsletters were sent to all living members of the Americans' Changing Lives cohort who participated in any of the previous 5 waves and asked to participate in Wave 6. All surviving ACL respondents (~1,526) are eligible to participate; there will be no screening for participation. After CST delivers the final ACL6 sample, SRO prepares/loads in SurveyTrak sample management system. On April 22 SRO mailed the pre-interview letter to potential interview participants, along with a prepaid incentive (\$30) to participate in the interview.

A 60-minute telephone interview will be conducted. Respondents will be asked to provide information on various social, economic, psychological, and health matters. SRO assumes 1,220 interviews will be successfully completed (an 80% response rate). It is also anticipated that more interviews may be conducted by proxy this wave (approximately 108 proxy interviews last wave). Although the data collection will primarily be conducted by SSL interviewers, SRO's systems will support the possibility of interviews to be conducted face-to-face for respondents who cannot be reached by telephone or prefer an in person visit. As data collection unfolds, SRO will revisit the need for face-to-face work with the PI and prepare a budget estimate for the scope of work based on location of respondents and other factors.

After the survey is completed, or the interview is suspended, the Interviewer will discuss the Home Visit and ask if the R is interested in participating. If R agrees, the Interviewer will obtain oral consent for the R to be contacted by ExamOne to schedule this Home Visit. SRO will send the R a pre-home visit packet by mail, which includes: (a) a letter briefly describing this second part of the study; (b) two copies of the consent form, one to sign and provide to the ExamOne Health Professional (HP) and one to keep; and (c) a \$50 incentive for participating in the Home Visit.

During the Home Visit, the Health Professional (HP) will collect the signed informed consent document. The signed U-M consent form will be mailed by ExamOne to the Home Visit Study Coordinator and logged in Weblog.

SSL interviewers will be responsible for reminder calls related to the Home Visit (e.g. Rs who do not schedule their appointment with vendor). Interviewers will use the Weblog system to record outcomes.

**SRO Project Period** 09/2018 - 09/2019  
**Data Col Period** 04/2018 - 08/2019  
**Security Plan** NA  
**Milestone Dates**

**PreProduction Start:****Pretest End:****Staffing Completed:****SS Train Start:** 04/02/2019**DC Start:** 04/23/2019**Pretest Start:****Recruitment Start:** 02/25/2019**GIT Start:** 04/01/2019**SS Train End:** 04/03/2019**DC End:** 09/14/2019**Other Project Team Members:**

Shonda Kruger-Ndiaye: SPA  
 Terri Ridenour: SRO Lead/Project Manager  
 Jaime Koopman: SSI (Blaise/STrak Specs)  
 Gary Hein: SSI (Weblog Specs)  
 Debra Heier: SSA (Project Coordination)  
 Becky Scherr: SSA (Project Coordination)  
 Grace Tison: Financial Analyst  
 Lisa Carn: Production Manager  
 Russ Stark: SSL STrak systems consultant and lab management  
 Jeff Smith: Technical Lead  
 Stephanie Windisch (and Chris Greene): Data Managers  
 Jeff Smith: SurveyTrak Programmer  
 Ashwin Dey: WebTrak, Weblog Programmer  
 Dave Dybicki: CAI Programmer-Blaise  
 Andrea Pierce: Help Desk

**Other Project Names:**

"Racial inequalities in health throughout adulthood: The cumulative impact of neighborhood chemical and non-chemical stressors on epigenomic pathways" (aka, "Social epigenomics of racial health inequalities - SERHI")

**Sample Mgmt Sys**

SurveyTrak

**Data Col Tool**

Blaise 4.8

**Hardware**

Desktop

**DE Software**

NA

**QC Recording Tool**

NA

**Incentive**

Yes, R

**Administration**

SRO Group

**Payment Type**

Check, prepaid (\$30 (interview) ); Other (Check, prepaid - \$50 (consent to WBD/making home appointment))

**Payment Method**

NA

**Report Period**

Aug, 2019 (ACL6)

**Project Phase**

Implementing

**Risk Level***Attention!***Monthly Update**

Below are the strategies we've implemented (or which are in progress):

- Increased Home Visit incentive (\$75)
- Attended SDG meeting with PI on 8/16
- Added 2 HRS Locators to our team
- Received sample maps and spreadsheet from DMSS
- Reiterated/reemphasized need for increased lwer hours
- Sent follow-up mailing (tote bag and postcard) 8/22
- Used new heatmaps/reports to inform SSL work (e.g. schedule early morning and afternoon shifts based on identified time slots)
- Received attempts by mode report to assess usage of email and text modes
- Assess results of mailing and project status (1st week of Sept.)

Maggie (PI) is working directly with James/Raphael/DMSS on propensity modeling and is working with the proposal group to discuss specifications and budget for Reboot/Relaunch options:

- SSL: consolidate SSL staff, extend limited SSL data collection and offer End Game incentive
- FTF: use maps of non-final sample, identified clusters to prepare budget for field data collection

- Possible use of propensity model to assign cases to various treatments

We plan to finish 20 weeks of current data collection period on 9/14/19. We will use this time to "pause," reassess goals vs. actual, review budget and work with client to determine approach for Reboot/Relaunch.

We still have a projected overrun, currently at \$43,696 (Direct). At this time, we know we won't be able to reach the 80% RR goal within our current project timeline. With less than 2 weeks remaining, some of the lower hours we have projected to meet our goal will be unspent. We've asked Grace to update the projection of lower hours we're not going to use in the next 2-3 weeks and make similar adjustments to the respondent incentives projections.

#### Special Issues

Cost

Aug 28, 2019

<b>Total Cost to Date (Direct + Indirect):</b>	601,244.05
<b>Estimated Cost at Completion (E\$AC):</b>	790,233.18
<b>Total Budget:</b>	722,153.00
<b>Variance (Budget minus E\$AC):</b>	-68,080.18



**Reason For Variance:**

The main drivers of the currently projected overrun are as follows:

- 1) Data management tasks, including additional support of and coordination with the CST, and preparation of sample for data collection.
- 2) Instrument changes— The budget assumed 15% content update from ACL5. Actual change was more substantial and there were more data model updates than anticipated, both prior to launch and during production. This required increased programming hours for implementing technical solutions and Help Desk hours for testing and release.
- 3) Home Visit protocol requirements have resulted in increased programming hours for implementing WebLog/Blaise/STrak solutions and testing. The use of WebLog was not included in the original budget and WebLog has required project customization (even with HRS as a starting point). The customization was essential for Home Visit coordination with the 3rd party vendor (ExamOne) and biorepository (CLASS Lab) and includes the mechanism for triggering follow up reminder calls by the SSL team. The development of workflow surrounding - Home Visit consent (including presentation upon interview suspend, and option for R to be initially undecided) also increased development cost.
- 4) Home Visit duplicating—SRO is printing and preparing all Home Visit materials and sending to Rs that have verbally consented or are "undecided" about the Home Visit.
- 5) Home Visit expedited shipping— UPS service is used to send Home Visit packets (letter, \$50 check and consent) and track shipments to minimize the time between receipt by R and ExamOne scheduling call.
- 6) Additional training hours for Interviewer staff and Team Leaders (TLs) due to shifted data collection timeline and decision not to delay training, but to keep skills fresh during post-training downtime.
- 7) Sample Size—The sample size was higher than budgeted, which increases interviewer hours for data collection, in addition to mailing, printing and postage costs.
- 8) Field Operations recharge rate increase (from \$3.21/hour to \$3.41/hour) effective December 2018 (i.e. after proposal was submitted and project award funded).
- 9) Field Hiring & Training recharge rate increase (from \$1.10 to \$1.39) effective December 2018 (i.e. after proposal was submitted and project award funded).
- 10) Lab Staff Rate Increase—Effective June 2, all SRO Survey Techs (e.g. Lab interviewers, TLs, evaluators, etc.) received a \$1.25/hour increase
- 11) DMSS support
- 12) Tote bag mailing (supplies, graphic design, printing, assembly and postage)
- 13) Increased Home Visit incentive (\$50 to \$75)
- 14) Additional locating services (MSG) and HRS Field Locator resources

Projections  
Aug 28, 2019

**Dollars Projected For Month:**

149,751.60

**Actual Dollars Used:**

92,484.49

**Variance (Projected minus Actual):**

57,267.11

**Reason For Variance:**

Our projections for lwer staff hours and incentives are higher than actuals.

Measures	Units Complete		RR	HPI
	<b>Current Goal:</b>		80%	5
	<b>Goal at Completion:</b>			
	<b>Current actual:</b>		50%	6.5
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			

**Other Measures**

Home Visit Consent

Goal at Completion: 700

Current Actual: 379

<b>Project Name</b>	Army Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study (A-STARRS LS)												
<b>Project Mode</b>	Primary: Web	Secondary: Telephone	Total of Modes: 3										
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current										
<b>Budget</b>	<b>Direct Budget:</b> 8,280,054.00	<b>Indirect Budget:</b> 4,554,645.00	<b>Total Budget:</b> 12,834,699.00										
<b>Principal Investigator/Client</b>	James Wagner (University of Michigan) Robert Ursano (Uniformed Services University of the Health Scienc) Murray Stein (University of California San Diego)												
<b>Funding Agency</b>	Department of Defense												
<b>IRB</b>	<b>HUM#:</b> HUM00099203	<b>Period Of Approval:</b>	2/18/2016-2/17/2017										
<b>Project Team</b>	<b>Project Lead:</b> Meredith A House <b>Budget Analyst:</b> William Lokers <b>Production Manager:</b> Ruth B Philippou <b>Senior Project Advisor:</b> Mary P Maher <b>Production Manager:</b> Juan Carlos Donoso <b>Production Manager:</b> Leah Marie Roberts												
<b>Proposal #:</b>	no data												
<b>Description:</b>	<p>This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). For STARRS LS, we will attempt to reinterview all respondents from the All Army Study (AAS), New Soldier Study (NSS) and Pre-Post Deployment Study (PPDS) samples using a web-phone multi mode study. Each of the approximately 70,000 eligible respondents will be invited to participate once every two years. In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS LS will continue to maintain and support the Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as de-identified historical administrative data received from the Army and Department of Defense (DoD). Additionally, STARRS LS will continue to receive and link de-identified administrative data to the survey data (from the original Army STARRS data collection as well as STARRS LS surveys). These data will also be made available in the Research Data Enclave.</p>												
<b>SRO Project Period</b>	02/2015 - 11/2019												
<b>Data Col Period</b>	10/2015 - 11/2019												
<b>Security Plan</b>	NA												
<b>Milestone Dates</b>	<table border="1"> <tr> <td><b>PreProduction Start:</b></td> <td><b>Pretest Start:</b></td> </tr> <tr> <td><b>Pretest End:</b></td> <td><b>Recruitment Start:</b></td> </tr> <tr> <td><b>Staffing Completed:</b></td> <td><b>GIT Start:</b></td> </tr> <tr> <td><b>SS Train Start:</b></td> <td><b>SS Train End:</b></td> </tr> <tr> <td><b>DC Start:</b> 09/12/2016</td> <td><b>DC End:</b> 07/25/2019</td> </tr> </table>			<b>PreProduction Start:</b>	<b>Pretest Start:</b>	<b>Pretest End:</b>	<b>Recruitment Start:</b>	<b>Staffing Completed:</b>	<b>GIT Start:</b>	<b>SS Train Start:</b>	<b>SS Train End:</b>	<b>DC Start:</b> 09/12/2016	<b>DC End:</b> 07/25/2019
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<b>Staffing Completed:</b>	<b>GIT Start:</b>												
<b>SS Train Start:</b>	<b>SS Train End:</b>												
<b>DC Start:</b> 09/12/2016	<b>DC End:</b> 07/25/2019												
<b>Other Project Team Members:</b>	Heather Schroeder, Paul Burton, Pete Larson, Ryan Yoder, Keith Liebetreu, Kelsey MulkaCheng Zhou, Shanti Suresh, Lisa Lewandowski-Romps, Lamont Manley, Chris Greene, Youhon Liu, Peter Sparks. Pam Swanson, Genise Pattulo, Andrew Hupp												
<b>Other Project Names:</b>													
<b>Sample Mgmt Sys</b>	MSMS												
<b>Data Col Tool</b>	Blaise 5												
<b>Hardware</b>	Desktop												
<b>DE Software</b>	N/A												
<b>QC Recording Tool</b>	Live monitoring												
<b>Incentive</b>	Yes, R												
<b>Administration</b>	SRO Group												
<b>Payment Type</b>	Check, post (\$50-\$100); Cash, prepaid (\$2 (or Challenge coin)); Other (Army STARRS challenge coin (provide												
<b>Payment Method</b>	Check through other system (MSMS); Imprest Cash Fund from ISR Business Office (MSMS); Other (Army STA												
<b>Report Period</b>	Aug, 2019 (A-STARRS LS)	<b>Project Phase</b>	Implementing										
<b>Risk Level</b>	On Track												
<b>Monthly Update</b>	<input type="checkbox"/> Wave 2 production data collection was completed on July 25. Final numbers: 12,133 main study interviews and 199 end game interviews. <input type="checkbox"/> We found two wrong respondents using the respondent verification protocol. A summary of the protocol and results is included in the Data Collection Progress and Plans section below.												

- The sub-award agreement for the Year 5 supplement funding was fully executed August 13.
- Following the July 22 call with representatives from the ODUSA and USUHS to discuss the use of NIOSH addresses, we sent a memo summarizing Wave 1 locating strategies and contact/response rates, per ODUSA request.
- We completed geocoding of the addresses for the full STARRS-LS sample, and appending census block to the file so that the research team will be able to link the STARRS-LS sample to census-type data. We discussed Enclave handling procedures for these data.
- The U-M IRB issued approval for the HIPAA Waiver amendment and signed the HIPAA Waiver certification document.
- The CDC issued conditional approval pending four revisions for the application we submitted for U-M to receive NDI data. We made the revisions and sent the application back to the CDC for continued review.
- We delivered STARRS-LS W1 survey public use materials to ICPSR on July 26. Curation is in process for both LS W1 and PPDS, and both are on target for a fall 2019 release.
- We made progress on biomarker group requests for assistance. Data transfers were completed for one request.
- We received 9 administrative data construct files from AAG via the data locker. The U-M team developed processes necessary for decrypting and preparing files for analyst use. Users were notified that the 9 files were available on the Enclave.
- We continued work on extending data transfer memo dates for 'data destruction' to a later date. USUHS shared with U-M copies of the six fully-executed agreements and we updated our transfer file lists with the new data destruction date of 12/31/2025.
- Our data management team worked on preparing the Wave 2 survey data for load to the Enclave. Our target date for preliminary data load is September 20.

## Special Issues

We continue to track areas of risk, and develop mitigation strategies.

- Enclave Support
  - o We continue to monitor priorities for Enclave support. We balance the primary Enclave support work with a number of more complex biomarker data support requests, which are outside of the reduced Enclave team scope in the STARRS-LS contract. We prioritize the primary work above other requests in accordance with project goals and to remain within budget/scope. As a result, the biomarker data support requests can take longer to service. As long as requestors are ok with this arrangement, we can continue to manage the work and priorities in this fashion.
- Scope additions
  - o Knowing there will be a third wave of data collection, and having a new Wave 3 timeline for planning purposes, are hugely helpful. The next challenge will be gaining specification and approval of scope so that we can create a formal budget and proposal and have that in place to start the work. For an April 2020 pre-production start, we will need approval of funding by January 2020, but our staff planning is at least six months ahead, so if in October 2019 it looks like Wave 3 will not start up again April 2020, we would need to look at what other projects staff should be assigned to instead. Additional consideration -
  - Enclave: if it does not look like funding will come through in October 2019 and be available January 2020, we will need to start the planning for decommissioning the Enclave no later than January 2020.
  - o There are a few cost estimates for new scope that have yet to be made (Table 5 above). As decisions are made, we will work with the research team to schedule and implement this work.
  - o We have started to receive some information on additional public use data releases, including release to the NIH National Data Archive. Several unknowns need to be clarified before we can finalize our scope and cost estimates, and determine what staffing will be needed for this work.

## Cost Jul 31, 2019

<b>Total Cost to Date (Direct + Indirect):</b>	12,085,110.16
<b>Estimated Cost at Completion (E\$AC):</b>	12,738,607.48
<b>Total Budget:</b>	12,834,699.00
<b>Variance (Budget minus E\$AC):</b>	96,091.51
<b>Reason For Variance:</b>	We are currently projecting an overall project surplus of \$96,092, an increase of \$33,577 from last month's report. In general, our surplus results from continued efficiencies and refinements in projections. We have added some projections for work (transitioning the instrument to the latest version of Blaise 5 data collection software) during the no cost extension, Dec 2019 – Mar 2020. We continue to define additional no cost extension activities, and in the coming months, we will work with Suzie to provide the information needed to document the no cost extension scope.

## Projections Jul 31, 2019

<b>Dollars Projected For Month:</b>	204,312.74
<b>Actual Dollars Used:</b>	171,318.05
<b>Variance (Projected minus Actual):</b>	32,994.69
<b>Reason For Variance:</b>	Non-salary actuals were higher than projections given that the amounts for the Enclave firewall and network switch hit (amounts will be removed from projections). Salary actuals were much lower than projections largely due to staff vacation time. Also \$7,600 projected in Research Salaries was for ICPSR's work on PPDS, of which, only \$832 were charged on other salary lines (Meredith will work with Bill on the best way to project ICPSR costs).

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

<b>Project Name</b>	Baby's First Years (BFY)			
<b>Project Mode</b>	Primary: Face to Face      Total of Modes: 1			
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current
<b>Budget</b>	<b>Direct Budget:</b>	3,786,038.00	<b>Indirect Budget:</b>	1,742,658.00 <b>Total Budget:</b> 5,528,696.00
<b>Principal Investigator/Client</b>	Dr. Greg Duncan (University of California - Irvine) Dr. Kimberly Noble (Teachers College Columbia University) Dr. Katherine Magnuson (University of Wisconsin)			
<b>Funding Agency</b>	National Institute of Child Health and Human Development (NICHD)			
<b>IRB</b>	<b>HUM#:</b>	HUM00137963	<b>Period Of Approval:</b>	
<b>Project Team</b>	<b>Project Lead:</b>	Piotr Dworak		
	<b>Budget Analyst:</b>	Janelle P Cramer		
	<b>Production Manager:</b>	Barbara Aghababian-Homburg		
	<b>Senior Project Advisor:</b>	Stephanie A Chardoul		
	<b>Production Manager:</b>	Margaret Lavanger		
	<b>Production Manager:</b>	Anthony Romanowski		
<b>Proposal #:</b>	no data			
<b>Description:</b>	<p>University of Michigan Survey Research Center (U-M SRC) is contracted to recruit and interview participants for Baby's First Years -- a longitudinal randomized control trial study.</p> <p>The study's full name, listed on sub-contract documents, is Household Income and Child Development in Early Years. The study will draw on a convenience sample of mothers and their newborns in four US metropolitan areas: New York City; Omaha/Lincoln; New Orleans; and Minneapolis. One or two hospitals, listed in this application, will be used as recruiting sites in each area. The study uses a randomized control trial design in which low-income mothers and newborns will be randomly assigned to a treatment group that receives an unconditional income enhancement -- cash payments of \$333 per month—an amount roughly comparable to a variety of income assistance policies in the U.S. and shown to be associated with meaningful improvements for poor children in prior studies—or to a control condition that receives \$20 per month. In both groups, the payments will be made for the first 40 months of the child's life. To understand the impacts of added income on children's development, researchers will assess treatment/control group differences at ages 1, 2 and 3 on measures of cognitive, language, memory, self-regulation and socio-emotional development. Recruitment is scheduled to start in April of 2018, and each follow-up interview will be conducted 12 months later -- close in time to the child's 1st, 2nd, and 3rd birthday. The feasibility of the approach has been established in a one-year pilot conducted in 2014 at the New York Presbyterian Hospital/Columbia University Medical Center.</p> <p>The Principal Investigators are Dr. Greg Duncan from University of California Irvine (UCI), Dr. Kimberly Noble from Teacher's College Columbia University (TCCU), and Katherine Magnuson from University of Wisconsin-Madison (UWM). UCI (Dr. Duncan) and TCCU (Dr. Noble) are the institutions and signatories funding the U-M SRC subcontract from various sources including the National Institute for Child Health and Human Development (NICHD) and private foundations listed in this application. The study research team also includes co-investigators Lisa Gennetian (New York University), and Hiro Yoshikawa (New York University).</p> <p>SRO will be responsible for four interactions with the selected mothers/infants:</p> <ul style="list-style-type: none"> <li>• Baseline will occur immediately (within 24-48 hours) after birth, in the hospital;</li> <li>• Wave 1 will be a telephone interview with the mother when the child is 12 months old;</li> <li>• Wave 2 will be an in-person interview in the family's home that includes survey, developmental assessment, biomarker collection, and video recorded behavioral interaction when the child is 24 months old;</li> <li>• Wave 3 will be an in-person survey done while the mother and child are visiting a lab for other clinical tests when the child is 36 months old.</li> </ul> <p>Each data collection phase/wave will be a full 12 months, with Baseline starting in April 2018:</p> <p>Recruitment/Baseline: 04/01/2018 - 03/31/2019  Wave 1: 04/01/2019 - 03/31/2020  Wave 2: 04/01/2020 - 03/31/2021  Wave 3: 04/01/2021 - 03/31/2022</p>			
<b>SRO Project Period</b>	10/2017 - 12/2020			
<b>Data Col Period</b>	04/2018 - 12/2020			
<b>Security Plan</b>	NA			

**Milestone Dates****PreProduction Start:** 10/01/2017**Pretest End:****Staffing Completed:** 02/07/2018**SS Train Start:** 03/20/2018**DC Start:** 05/07/2018**Pretest Start:****Recruitment Start:** 01/01/2018**GIT Start:** 03/19/2018**SS Train End:** 03/22/2018**DC End:** 06/30/2022**Other Project****Team Members:**

Stephanie Chardoul (SPA)  
 Piotr Dworak (Lead)  
 Tony Romanowski (PM)  
 Daric Thorne (PM/SSA)  
 Barb Homburg (PM)  
 Peggy Lavanger (PM)  
 Jim McClure (DCS)  
 Jeff Smith (tech lead)  
 Jim Rodgers (MSMS consultant)  
 Andrew Hupp (MSMS consultant)  
 Pam Swanson (MSMS programmer)  
 Kyle Kwaiser (Data Manager)  
 Dave Dybicki (Blaise)  
 Colette Keyser (Blaise)  
 Tricia Blanchard (MSMS)  
 Kyle Goodman (Help Desk)  
 HHICD Household Income and Childhood Development

**Other Project****Names:****Sample Mgmt Sys****Data Col Tool****Hardware****DE Software****QC Recording Tool****Incentive****Administration****Payment Type****Payment Method**

MSMS  
 Blaise 5  
 Laptop; [UM cell] Phone  
 N/A  
 Other (to be specified)  
 Yes, R  
 SRO Group  
 Cash, prepaid (50)  
 Check through other system (MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (MSMS)

**Report Period**

Aug, 2019 (BFY)

**Project Phase**

Implementing

**Risk Level***On Track***Monthly Update**

Project updates:

We are in week 10 of 53 with 7.8% completion rate. Response rate on all attempted lines is 41.3%. Sample release is staggered by baby's date of birth which chokes off some of the field efficiency. We are looking for options to make more sample available to interviewers. We are also working through the deficit created in weeks 1 - 5 wherein sample was ready to be released (given baby DOB) but interviewers were still being trained and getting ready to go (Spanish instrument was also released later).

Current total deficit on goals is - 62 which means that in the next 40 weeks we need to exceed weekly goals by 1.6 to meet the overall wave goals.

Based on R feedback and internal considerations (iw length, R burden during the visit) we are increasing study incentive from \$50 to \$100. Expect increase to have significant impact on production and being able to meet and exceed goals.

Data collection / Sample:

Overall Age 1 Cumulative Goals (week 10 of 53):

Site	Goal	Actual	+/-
Overall	134	72	-62
Nebraska	40	19	-21
New York	45	27	-18
Minnesota	8	4	-4
Louisiana	41	22	-19

## Staffing:

We have concerns with 2 interviewers in NE who are now on PIP. Looking for options to recruit more in NE.

## Age 1 Staffing:

14 iwers in total

NE: 3 (all NH, 2 with BFY Enrollment experience)

MN: 1 (Enrollment NH)

NY: 4 OS (3 with Enrollment experience)

NOLA: 3 (2 Enrollment NH and 1 OS)

Travelers: 3 (OS, one with shared responsibility as a locator)"

## Technical system:

EEG data collection is posing problems. EEG amplifier had to be replaced for all interviewers. Actual rate of EEG completion is below expectations (60% vs. 80%) and some data is not usable due to short recordings (mostly babies are fussy). Complexity of the EEG system extends the time needed for interviewers to become confident.

## Finances:

Budget overrun has been reduced in June after re-adjusting travel expectations but increased in July. Overall, the overrun is a result of Recruitment onboarding expenses (discussed with Pls), and subsequent re-charge changes, increase in average iwer mix rate (tenured increase in pay increasing the blended projection mix), adjustments to project fixed costs (travel, printing, etc.). Further adjustments to the budget are needed to bring revised budget closer to expectations.

## Special Issues

## Cost

Sep 30, 2019

<b>Total Cost to Date (Direct + Indirect):</b>	1,918,096.39
<b>Estimated Cost at Completion (E\$AC):</b>	6,317,200.44
<b>Total Budget:</b>	5,528,696.00
<b>Variance (Budget minus E\$AC):</b>	-189,502.44
<b>Reason For Variance:</b>	Several re-charge, iwer pay blend, and other critical adjustments resulted in large overrun. All adjustments need to be re-evaluated and re-projected to come up with ways to end up the remaining 3 years on budget.

## Projections

Sep 30, 2019

<b>Dollars Projected For Month:</b>	105,915.15
<b>Actual Dollars Used:</b>	109,508.24
<b>Variance (Projected minus Actual):</b>	-3,593.09
<b>Reason For Variance:</b>	

## Measures

	Units Complete	RR	HPI
<b>Current Goal:</b>	134	—	7
<b>Goal at Completion:</b>	900	—	7
<b>Current actual:</b>	72	—	18
<b>Estimate at Complete:</b>	900	—	7
<b>Variance:</b>			

## Other Measures



**Project Name** Concussion Assessment, Research and Education (CARE) Consortium (C.A.R.E.)

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

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

**Budget** **Direct Budget:** 821,295.00 **Indirect Budget:** 213,538.00 **Total Budget:** 1,034,833.00

**Principal Investigator/Client** Dr. Steven Broglio (U of M Kinesiology)  
Dr. Michael McCrea (Medical College of Wisconsin)  
Dr. Thomas McAllister (Indiana University School of Medicine)

**Funding Agency****IRB****Project Team****HUM#:** **Period Of Approval:****Project Lead:** Donnalee Ann Grey-Farquharson**Budget Analyst:** William Lokers**Production Manager:** Kathleen S Ladronka**Senior Project Advisor:** Barbara Lohr Ward**Production Manager:****Production Manager:****Proposal #:** no data

**Description:** This budget assumes an overall SRO involvement period of 24 months commencing in January 2019 with data collection taking place during a 20-month period, beginning April 2019. The total cost for this work is estimated at \$1,034,833 (\$821,295 direct, \$213,538 indirect), budgeted at the NCAA's published indirect cost recovery rate of 26%.

SRO will provide consultation, respondent location activities and data collection for the NCAA-DoD Grand Alliance (Cumulative and persistent effects of concussion and repetitive head impact exposure: An intermediate follow-up study of US Military Service Academy members and NCAA student-athletes in the CARE Consortium) project. Specifically, SRO will provide consultation on respondent locating and panel maintenance procedures and instruments, locate and contact respondents by mail and phone to prompt them to access the online data collection questionnaire, and conduct telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.

The estimate assumes that approximately 7,500 (approximately 5,000 in the first year and 2,500 in the second year of the project) respondents are included in the initial outreach/email request to complete the online instrument by your research team, and that approximately 20% comply. The remaining 6,000 respondents will be followed up by SRO with locating, further contacts and prompting to complete the web survey. Finally, we anticipate direct outreach by telephone interviewers with access to the online application. All respondent incentives will be paid by the research staff.

**SRO Project Period** 12/2018 - 09/2020**Data Col Period** 02/2019 - 06/2020**Security Plan** NA**Milestone Dates****PreProduction Start:****Pretest End:****Staffing Completed:****SS Train Start:****DC Start:****Pretest Start:****Recruitment Start:****GIT Start:****SS Train End:****DC End:****Other Project Team Members:**

Donnalee Grey-Farquharson, Kathy LaDronka, William Lokers, Hongyu Johnson, Keith Leibetreu, James Koopman

**Other Project****Names:**

<b>Sample Mgmt Sys</b>	Other (QuesGen)
<b>Data Col Tool</b>	Other (QuesGen)
<b>Hardware</b>	Laptop
<b>DE Software</b>	External vendor (QuesGen)
<b>QC Recording Tool</b>	N/A
<b>Incentive</b>	Yes, Other (Managed by Consortium)
<b>Administration</b>	SRO Group
<b>Payment Type</b>	N/A
<b>Payment Method</b>	N/A

<b>Report Period</b>	Aug, 2019 (C.A.R.E.)	<b>Project Phase</b>	Planning
<b>Risk Level</b>	<i>On Track</i>		
<b>Monthly Update</b>	<p>08/2019  Delays in the programming and delivery of scheduled SMS updates as led to the delay of training. Training is now scheduled for 9/25-9/26 with Train-the Trainers scheduled for 9/24. CARE will be acquiring/phasing in a new Production Manager as Kathy LaDronka is phasing out and will be leaving the project early 2020.</p> <p>07/2019  RR to to initial contact from CARE Team emails and texts is very low. CARE has requested a ball park estimate for a change in scope to increase the number of cases that will come to SRO for in-depth locating from 3000 to 6000 assuming lwer led interviewing for all sample plus locating if necessary. The estimate was completed and delivered and Pls will be making a decision regarding that protocol in August. As well, Pls sought Methodology input from SRO PDMG and as a result may be sending prenotification mailing or a postcard during data collection. As a result of the low RR The PI's have also decided to send an extra 500 cases along with the 200 from the pilot (Pilot 1) for SRO's lwers to contact for Phone lw/locating. These 500 (Pilot 2) will not have had any prior contact from the CARE team (no email, texts, etc) before coming to SRO to be contacted. As well, there will be a Pilot 3 with ~1200 cases that will be put through the new protocol. This will push main production back and will likely lengthen out data collection period.</p> <p>Systems specs and programming is progressing well, as is the refinement of the lwer led questionnaire. Release 1 (Pilot 1) is now available for batch update and SRO is working with Accurant to move that process along.</p> <p>We will start putting together training materials and gearing up for training in August. Thsi first training will be remote. Due to the addition of sample we will train 6 lwers instead of 3. It is understood that this entire first round will be a learning experience on all fronts as we prepare for Pilot 3 training in late fall. We will train the full team that will be used for main at the Pilot 3 training.</p> <p>Reports are being delivered monthly to the UM PI. The first one was delivered this month.</p> <p>06/2019  CARE released the self-administered survey on June 18, 2018. SRO has decided to go with Accurant for email and cell phone batch update. QuesGen has delivered the basic features SRO requested and we will be working in July to refine the system. QuesGen still has to update the survey to reflect the specs submitted to them for the lwer administered version. SRO has decided to go with 3 Locators for the Pilot (September to November) and a full team of 8 for the main production. Pilot training will take place remotely and training for the main will be in-person.</p> <p>05/2019  Approval has been received from HRPO for the NCAA-only/civilian side of the Post-grad CARE study, which is the portion in which SRO is involved. Day 1 (release of self-administered interview is scheduled to be June 18 or soon after). This will put SRO interviewer involvement at the beginning of September.</p> <p>System development was very slow and SRO started to feel the need to bring it back in-house. Stating this to the CARE team resulted in this issue being moved up to the level of the Pls and a flurry of activity ensued. Within 10 days they provided us with a system with great potential. In June SRO will test the system and provide feedback to help refine it. The reporting feature is the 1st piece, work on this has not started as yet but based on the progress made recently it is highly likely that this can be delivered in June.</p> <p>SRO put in a request to have an on-site training since we will be using non-familiar systems and the request was granted.</p> <p>04/2019  UM IRB approval has been received and the study is now under review with HRPO. Expecting delivery from QuesGen of an initial/rudimentary management system for testing on May 7th.</p>		

03/2019

IRB approval has not been received so production will be further delayed. In the meantime, quotes have been received from both Melissa and Accurint and a decision will be made soon about which of these vendor to use for batch update. SRO is working with The CARE programmer to spec the management system.

02/2019

The CARE team has been selected and Project Review/Kickoff was held 2/15/2019. Several concerns were presented including working with systems that are completely external to SRO and out of our control.

SRO has delivered specifications for the Interviewer administered questionnaire to the CARE staff but it has not been programmed as yet. Specifications for reports have also been delivered to CARE but reports also have not been programmed as yet. In addition, the project is still waiting for IRB approval. As a result of these issues, interviewer training will be delayed from mid-late April to mid-late June at the earliest.

**Special Issues**

reflect the

**Cost**

Jul 31, 2019

**Total Cost to Date (Direct + Indirect):** 110,107.30  
**Estimated Cost at Completion (E\$AC):** 904,951.27  
**Total Budget:** 1,034,833.00  
**Variance (Budget minus E\$AC):** 129,880.73  
**Reason For Variance:**

01/2019

Programming and data management work that was budgeted is no longer a part of SRO's scope.

**Projections**

Jul 31, 2019

**Dollars Projected For Month:** 37,030.26  
**Actual Dollars Used:** 19,795.68  
**Variance (Projected minus Actual):** 17,234.58  
**Reason For Variance:**

03/2019

Projections to be updated/moved forward to reflect start production start date

02/2019

Production and some associated activities delayed. Projections have been adjusted moving forward.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>			
<b>Goal at Completion:</b>			
<b>Current actual:</b>			
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

**Other Measures**

<b>Project Name</b>	Emergency Department Study to Assess Risk of Suicide - Continuation Project (ED-Stars Continuation)																							
<b>Project Mode</b>	Primary: Telephone      Total of Modes: 1																							
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current																				
<b>Budget</b>	<b>Direct Budget:</b>	341,436.00	<b>Indirect Budget:</b>	187,848.00 <b>Total Budget:</b> 529,284.00																				
<b>Principal Investigator/Client</b>	Cheryl King, Ph.D., ABPP (University of Michigan) Jacqueline Grupp-Phelan, M.D., MPH (Children's Hospital Medical Center, I David A. Brent, M.D. (University of Pittsburgh Medical Center)																							
<b>Funding Agency</b>	National Institute of Mental Health (NIMH)																							
<b>IRB</b>	<b>HUM#:</b>	HUM00134293	<b>Period Of Approval:</b>	7/31/2017-7/30/2018																				
<b>Project Team</b>	<b>Project Lead:</b>	Maureen Joan O'Brien																						
	<b>Budget Analyst:</b>	Janelle P Cramer																						
	<b>Production Manager:</b>	Lisa J Carn																						
	<b>Senior Project Advisor:</b>	Kirsten Haakan Alcser																						
	<b>Production Manager:</b>	Maryam N Buageila																						
	<b>Production Manager:</b>																							
<b>Proposal #:</b>	no data																							
<b>Description:</b>	<p>The study looks at suicide warning signs for the 24 hour period prior to a suicide attempt among adolescents in the United States. The main aim of this study is to gain a better understanding of which adolescents are at imminent risk and when they are at imminent risk for attempting suicide. Warning signs for suicide attempts are determined by examining differences between adolescent cases (suicide attempters) and controls (non-attempters) in emotions, thoughts, behaviors, and life events during the 24-hour period prior to suicide attempts, and by determining which 24-hour warning signs are commonly associated with suicide attempts for subgroups of adolescents. Approximately 1800 of ED STARS Study 2 sample age 12-18 are expected to participate in the ED-Stars Continuation; their parents will also be consented for the project. Ubitrix, an outside software organization under contract, sends text messages to selected respondents every two weeks, for eighteen months, asking mental health questions including if they have attempted suicide in the last two weeks. When a respondent endorses suicide items, SRO is alerted and completes a phone questionnaire with the respondent. SRO attempts to reach these "safety" cases within 24 hours. There are three controls selected for each case by PECARN. The instrument used is the Warning Signs for Suicide Attempt-Adolescent (WSSA-A). All Respondents who endorse items of suicide either by text or by phone interview are transferred to Boys Town National Suicide Hotline at the completion of the phone interview.</p>																							
<b>SRO Project Period</b>	01/2018 - 12/2020																							
<b>Data Col Period</b>	01/2019 - 09/2019																							
<b>Security Plan</b>	NA																							
<b>Milestone Dates</b>	<table border="1" style="width: 100%;"> <tr> <td><b>PreProduction Start:</b></td> <td>10/15/2017</td> <td><b>Pretest Start:</b></td> <td></td> </tr> <tr> <td><b>Pretest End:</b></td> <td></td> <td><b>Recruitment Start:</b></td> <td>11/01/2017</td> </tr> <tr> <td><b>Staffing Completed:</b></td> <td></td> <td><b>GIT Start:</b></td> <td></td> </tr> <tr> <td><b>SS Train Start:</b></td> <td>01/22/2018</td> <td><b>SS Train End:</b></td> <td>01/23/2018</td> </tr> <tr> <td><b>DC Start:</b></td> <td>01/24/2018</td> <td><b>DC End:</b></td> <td>09/30/2019</td> </tr> </table>				<b>PreProduction Start:</b>	10/15/2017	<b>Pretest Start:</b>		<b>Pretest End:</b>		<b>Recruitment Start:</b>	11/01/2017	<b>Staffing Completed:</b>		<b>GIT Start:</b>		<b>SS Train Start:</b>	01/22/2018	<b>SS Train End:</b>	01/23/2018	<b>DC Start:</b>	01/24/2018	<b>DC End:</b>	09/30/2019
<b>PreProduction Start:</b>	10/15/2017	<b>Pretest Start:</b>																						
<b>Pretest End:</b>		<b>Recruitment Start:</b>	11/01/2017																					
<b>Staffing Completed:</b>		<b>GIT Start:</b>																						
<b>SS Train Start:</b>	01/22/2018	<b>SS Train End:</b>	01/23/2018																					
<b>DC Start:</b>	01/24/2018	<b>DC End:</b>	09/30/2019																					
<b>Other Project Team Members:</b>	Note that the initial project lead was Esther Ullman. Maureen O'Brien served as project manager. As of April 1, 2019, Maureen is project lead.																							
<b>Other Project Names:</b>	Continuation, Warning Signs, ED-Stars Continuation,																							
<b>Sample Mgmt Sys</b>	SMS																							
<b>Data Col Tool</b>	Blaise 4.8																							
<b>Hardware</b>	Desktop																							
<b>DE Software</b>	NA																							
<b>QC Recording Tool</b>	NA																							
<b>Incentive</b>	Yes, Other (Amazon gift card )																							
<b>Administration</b>	NA																							
<b>Payment Type</b>	NA																							
<b>Payment Method</b>	NA																							

<b>Report Period</b>	Aug, 2019 (ED-Stars Continuation)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	On Track		

**Monthly Update**

Currently 122 Case interviews and 283 Control interviews have been completed, for a total of 405 completed interviews. Overall RR is 80% for closed cases. Controls continue to have a higher RR than Cases (85% for Controls and 70% for Cases). 1092 Study 2 respondents agreed to participate out of 1321, for an overall consent rate of 82% (both parents + teen). 139 sample lines were determined ineligible due to no cell phone access which makes them unable to participate in the txt survey from Ubitrix. Control delivered had come to a stop with no controls delivered for 5 weeks due to inability to match cases to controls (low case sample & conservative matching criteria). Last week, the DCC re-delivered 10 controls which had been attempted 25-45 times with no interview. 9 were non-interview and 1 was non-sample. We do not expect these lines to be very productive although we will monitor closely. SRO determined how to technically reintroduce this sample into the sample management system again, appending an R to the SID. DCC informs us we can expect 20 more control NI/NS to be delivered over the next couple weeks and they will not be re-delivered more than once. We have been delivered 138 unique cases (first attempters) and have completed 94. Decreased case delivery continues, as suicide attempts generally decrease during the summer months. 6 cases total have been delivered in August thus far. We continue to consider the effect of reduced sample delivery on production, scheduling, and budget. Starting June 1, weekly SSL shifts were reduced. One shift per week is worked by the postdoc working with the PI. Iwer practice sessions continue with the Co-PI. All but one Phase I Iwer has advanced to Phase II and only meet biweekly with the Co-PI. The remaining Iwer is almost ready to advance, and is attending sessions with Phase II Iwers, as well as 1:1 sessions with the Co-PI on alternating weeks. We continue to see cost savings due to the reduced interviewer shifts and practice sessions. The PI has stated she would like to carry funds to April 2020. At this point funds are carrying us through Feb 2020 and the underrun is growing, possibly accommodating another month. We will continue to evaluate this in upcoming months.

**Special Issues****Cost**

Aug 31, 2019

<b>Total Cost to Date (Direct + Indirect):</b>	486,844.24
<b>Estimated Cost at Completion (E\$AC):</b>	629,788.50
<b>Total Budget:</b>	529,284.00
<b>Variance (Budget minus E\$AC):</b>	14,642.50
<b>Reason For Variance:</b>	Total budget dollars is \$640,421.00. It was \$531,221.00, but the PI increased funds by 70k direct so that we could continue data collection. The reason for variance is increased costs due to increase in programming needs for instrument changes, increase in management time due to extensive time and resources to prepare and implement Iwer training sessions with PI's.

**Projections**

Aug 31, 2019

<b>Dollars Projected For Month:</b>	20,370.70
<b>Actual Dollars Used:</b>	15,396.63
<b>Variance (Projected minus Actual):</b>	4,974.07
<b>Reason For Variance:</b>	Variance is due to staffing hours decrease due to lowered sample delivery. Shifts were reduced and people shifted to other projects as available for May. In June, less hours will be scheduled.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>			
<b>Goal at Completion:</b>	1800		
<b>Current actual:</b>	405	80	2.91
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

**Other Measures**

Project Name	Environmental Influences on Child Health Outcomes (ECHO)					
Project Mode	Primary: Face to Face		Secondary: Telephone		Total of Modes: 2	
Project Type	Sponsored Projects				Project Status	Current
Budget	Direct Budget:	302,269.00	Indirect Budget:	169,270.00	Total Budget:	471,539.00
Principal Investigator/Client	Nigel Paneth (Michigan State University) Michael Elliott (University of Michigan )					
Funding Agency	NIH					
IRB	HUM#:	HUM00139050	Period Of Approval:	10/7/2019-10/6/2020		
Project Team	Project Lead:	Terri Ann Ridenour				
	Budget Analyst:	Parina Kamdar				
	Production Manager:					
	Senior Project Advisor:	Evanthia Leissou				
	Production Manager:	Ian Ogden				
	Production Manager:	Sharon K Parker				
Proposal #:	no data					

**Description:** The goal of ECHO is to understand pressing childhood health concerns such as autism spectrum disorders, low birth weight and childhood obesity. The project will collect survey data and a series of bio-specimens in order to assess the effects of persistent organic pollutants and heavy metals, the maternal nutritional or weight status in pregnancy, and pregnancy infection and inflammation on the health of children.

The project will include two sample cohorts; one cohort from previous, ongoing data collection efforts as well as new sample. The existing sample cohort includes mothers and children recruited in 2011 or later for the Archive for Research in Child Health (ARCH) study in the Lansing area. The newly recruited sample cohort, MARCH (Michigan Archive for Research in Child Health), will consist of 1,100 pregnant women from 21 clinics associated with 11 hospitals in Michigan; a statewide probability sample of 1,000 women from 20 clinics in Detroit, Saginaw, Traverse City, Grand Rapids, and Sturgis, and 100 women from one clinic in Flint.

SRO's work scope is divided into two phases. During Phase 1, SRO will provide assistance with prenatal questionnaire development, and design technical systems for MARCH cohort recruitment to be conducted by Michigan State University recruiters. During Phase 2, SRO will develop systems and conduct data collection for MARCH and ARCH samples, and perform data management of MARCH data.

For the MARCH sample, expectant mothers will be recruited during their initial visit to a healthcare provider, and asked to complete an interview about nutrition, levels of physical activity, use of healthcare services, physical and mental health, prescription medications and other substance use. In addition, women will be asked to give blood samples in the first and second trimesters and urine samples in all three trimesters.

The sample recruitment and administration of prenatal interviews will be done by MSU interviewers using SRO's technical systems and laptops. SRO will program all questionnaires to be administered in the study, the sample management system(s), and the system to keep track of the collection and storage of blood and urine samples. When babies are born, the research team will obtain hospital birth records for the mother and child, and a placenta sample. The first MARCH babies were born in late Fall, 2017.

SRO's involvement in data collection starts after the MARCH babies are born. The first interview with the mother will be done when the baby is 3 months old. Mothers will be interviewed again when the children are 12 months old and yearly after that until the child is 6 years old. When the children are 3 months old, mothers will provide fecal samples, and at age 4 they will provide shed teeth. Children from the two cohorts will be assessed using standardized developmental assessments at age 2, 4, and 6 years old. The assessments will be done during in-person or in-home visits. MSU will start interviews and in-person assessments of children from the ARCH cohort in the summer 2019 and SRO will start interviews and in-home assessments of children from MARCH cohort in winter 2021.

**SRO Project Period** 01/2017 - 12/2020

**Data Col Period** 05/2018 - 12/2020

**Security Plan** NA

**Milestone Dates**

**PreProduction Start:**

**Pretest End:**

**Staffing Completed:**

**SS Train Start:**

**DC Start:**

**Pretest Start:**

**Recruitment Start:**

**GIT Start:**

**SS Train End:**

**DC End:**

**Other Project Team Members:**

Ian Ogden: Project Manager  
 Parina Kamdar: Financial Analyst  
 Gregg Peterson: Senior Technical Advisor  
 Jeff Smith: Technical Lead  
 Jonathan Harrison and Neil Eriksen: Data Managers (Phase 1)  
 Brad Goodwin: Data Manager (Phase 1)  
 Jeff Smith: Systems Programmer  
 Ashwin Dey: Systems Programmer  
 Hueichun Peng: CAI Programmer-Illume  
 Jim Hagerman: CAI Programmer-Blaise  
 Shaowei Sun: Biospecimen Logging Application Programmer  
 Deb Wilson: Help Desk

**Other Project****Names:****Sample Mgmt Sys****Data Col Tool****Hardware****DE Software****QC Recording Tool****Incentive****Administration****Payment Type****Payment Method**

SurveyTrak; Illume  
 Blaise 4.8; Illume  
 Laptop; Tablet; [UM cell] Phone; Paper and Pencil  
 Other (Custom Biospecimen Logging Application )  
 Camtasia  
 Yes, R  
 SRO Group  
 Check, post (\$20 (3-Month IW), \$20 (Biospecimen))  
 Check through STrak RPay System

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**Report Period** Aug, 2019 (ECHO) **Project Phase** Implementing

**Risk Level** *Some Concerns*

**Monthly Update** [Phase 1: Recruitment]

MARCH sample recruitment and prenatal data collection continues in Ann Arbor, Canton, Detroit and Traverse City. Recruitment at Covenant (Saginaw) started in one clinic (CMU) and then will move on to the 2nd Covenant Hospital-affiliated clinic. The next hospitals to come on board are in Saginaw, Dearborn, Grand Rapids and Port Huron.

To date, 715 women have been recruited. Among those cases, 610 are still eligible and active in the study.

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 [Phase 2: 3-Month Data Collection]  
 Babies born: 469  
 3-month sample released: 426  
 3-Month Interviews Completed: 285  
 Production HPI: 3.14  
 Average Attempts / lw: 6.88  
 lw length: 31.26  
 lw Rate: 74%

**Special Issues** On August 19 we learned from the MSU team that the Y4 Funds will not be dispersed until they complete the 10 steps required for "Activation" of the ECHO-wide Cohort Data Collection Protocol (EWPC). August 31 is the approval deadline.

EWPC site-activation includes: staff identified, trainings & webinars attended/viewed, familiarity with materials – such as manuals and forms, local IRB requirements and approved consents. The updated consents are pending MSU IRB approval and MDHHS IRB approval.

**Cost**  
**Aug 20, 2019**

<b>Total Cost to Date (Direct + Indirect):</b>	412,332.40
<b>Estimated Cost at Completion (E\$AC):</b>	462,638.21
<b>Total Budget:</b>	471,539.00
<b>Variance (Budget minus E\$AC):</b>	-3,469.21

**Reason For Variance:**

-We are planning to end Year 3 with neither an overrun nor underrun.

-Due to the shifting of clinic onboarding and current sample recruitment projections, it is likely by Year 5 (2020-21) we will need additional funds that were unused in Year 2. We will continue to monitor closely to assess our future needs.

**Projections  
Aug 20, 2019**

**Dollars Projected For Month:** 42,465.96  
**Actual Dollars Used:** 37,791.41  
**Variance (Projected minus Actual):** 4,674.55  
**Reason For Variance:**

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>	See Monthly Updates		
<b>Goal at Completion:</b>			
<b>Current actual:</b>			
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

**Other Measures**



Project Name	Every Dollar Counts Program Evaluation (EDCPE)					
Project Mode	Primary: Face to Face		Total of Modes: 1			
Project Type	Sponsored Projects			Project Status	Current	
Budget	Direct Budget:	1,510,629.00	Indirect Budget:	453,189.00	Total Budget:	1,963,818.00
Principal Investigator/Client	Y Combinator Research Dr. Elizabeth Rhodes (Y Combinator Research) Dr. Sarah Miller (University of Michigan)					
Funding Agency						
IRB	HUM#:	HUM00145626		Period Of Approval:		
Project Team	Project Lead:	Karin Schneider				
	Budget Analyst:	Megan Gomez-Mesquita				
	Production Manager:	Barbara Aghababian-Homburg				
	Senior Project Advisor:	Kirsten Haakan Alcser				
	Production Manager:	Donnalee Ann Grey-Farquharson				
	Production Manager:	Carlos Andres Macuada Lopez				

**Proposal #:** no data

**Description:** Y Combinator Research (YCR) and affiliated researchers at Stanford University are undertaking this randomized controlled trial as an exploration of an alternative to the traditional social safety net. Basic income is a method of redistributing resources to address economic insecurity. This study will examine individual-level effects of the receipt of monthly unconditional payments.

The budget assumes an overall SRO involvement period of 22 months commencing in April 2018 with the main data collection taking place during a 9-month period, beginning March 2019. A single-county pilot of 80 cases is expected to take place over a two-month period in the late summer of 2018.

YCR is expected to select counties in two states and census tracts within counties to be included in the study, and sample addresses within these tracts. YCR will then send outreach/enrollment packets to the addresses requesting that households respond online (web-based form) and complete the study screener. After screening, YCR will select approximately 3,500 households that are eligible to be enrolled in the main study by in-person visits. SRO will approach these 3,500 households and conduct the baseline data collection with approximately 3,000 individuals. Following the baseline data collection, YCR will randomize the participants to the treatment and control groups and continue monthly payments and further contacts.

Prior to the main data collection, YCR will implement address selection and outreach within Alameda County and SRO will conduct an 80-case pilot data collection with in-person enrollment interviews. In the pilot, YCR will implement an experimental protocol to test recruitment methods that result in higher response and take-up rates.

#### Sampling:

- YCR is responsible for sample selection and for providing SRO with selected respondent contact information for both the pilot and main data collection.

#### Questionnaire Development:

- YCR will provide SRO with finalized questionnaires to be used for the pilot and baseline enrollment, with approximately 80% overlap between the two instruments.
- The questionnaire will collect demographic information, baseline measures of outcome variables (e.g., subjective wellbeing, financial health, employment, income, self-rated health and healthcare utilization, housing stability, food security, material hardship, etc.) and control variables (e.g., educational attainment).
- SRO will provide Spanish translation of the pilot and baseline enrollment instruments.

#### Computer Assisted Interviewing (CAI) Programming:

- SRO will program and test the 45-minute pilot and baseline instruments in both English and Spanish.

#### Sample Control Systems:

- SRO will customize our sample management system to control all screened sample provided by YCR, and track all appointments, progress, and outcomes at each sampled address for both the pilot and main data collection.

#### Training:

- SRO will hire and train approximately 28 total interviewers (including three interviewers to conduct the pilot) data collection. Separate trainings will be held in each state for the main study and one training will be held for the pilot.
- SRO will develop all study-specific interviewer training materials in consultation with YCR.

- Interviewers new to SRO (approximately 23) will receive approximately two days of training on general interviewing techniques. The entire interviewing staff will then receive approximately two additional days of training on study-specific protocols.
- Approximately 30% of the field staff will be bilingual.

#### Data Collection:

- For the main data collection, SRO will visit approximately 3,500 addresses of screened households up to three times to confirm participation and conduct the baseline data collection with 3,000 participants
  - o Two regions included: 1500 participants in Michigan, 1500 in California
  - o Multi-county area in Michigan (assumed to include Wayne, Oakland, Macomb and Genesee counties) and a multi-county area in California (potentially, Sacramento, San Joaquin, Stanislaus, and Merced counties)
- o At each eligible household, SRO will:
  - ☐ Confirm participation consent
  - ☐ Request authorization to access participants' records in administrative data, and contact information for friends and family to help locate the participant if we cannot reach them
  - ☐ Request participants complete a W-9
  - ☐ Determine if the participant has consistent internet access, a smartphone with text capability (confirm number by sending a test text), and an e-mail address
  - ☐ Provide individuals with a basic smartphone if they do not have consistent internet access (hardware costs are not included in the SRO budget) and data plan (costs are not included in the SRO budget) for the duration of the study (determination that the participant has an alternative and no longer wishes to use the phone provided by the study after this point of contact will be the responsibility of YCR)
  - ☐ Give participant a pre-loaded bank/debit card with \$50 and help them register the card online
  - ☐ Administer baseline survey, programmed by SRO, of approximately 45 minutes in length (in total, we have estimated a two-hour in-home interaction with the participant)
  - ☐ Administer consent and collect the following physical measurements:
    - ☐ Blood pressure
    - ☐ Height and weight

- We assume these procedures will be implemented in the single-county pilot, where SRO interviewers will visit households pre-selected by YCR.

- All participant incentive payments are the responsibility of YCR.

#### Post Collection Processing:

- SRO will conduct standard data cleaning for the survey datasets administered by SRO interviewers.
- We have not budgeted for coding any open-ended.

#### Weighting and Estimating:

- SRO will develop survey weights for analysis.

#### Deliverables:

- SRO will provide daily progress reports on baseline data collection to YCR as well as:
  - o A summary of field methods at the end of the baseline data collection
  - o A full dataset with all participant contact information for further follow up halfway through the data collection phase, and again at the close of the baseline phase,

The SRO budget does not include:

- Administrative data collection
- Collection of expenditure data from financial institutions

#### SRO Project Period

04/2018 - 02/2020

#### Data Col Period

03/2019 - 11/2019

#### Security Plan

NA

#### 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:

Kirsten Alscer (SPA), Karin Schneider (Project Lead), Donnalee Grey-Farquharson (Project Manager), Marsha Skoman (Tech Lead), Jeff Smith (Tech Lead backup), Jim Hagerman (Blaise Programmer), Holly Ackerman (Webtrak Programmer), Chris Greene (Data Manager), Barb Homburg (Production manager), Carlos Macuada (Production Manager), Megan Gomez-Mesquita (Financial Analyst)

<b>Other Project Names:</b>	EDC Program Evaluation
<b>Sample Mgmt Sys</b>	YCombinator Research Basic Income Study
<b>Data Col Tool</b>	SurveyTrak
<b>Hardware</b>	Blaise 4.8
<b>DE Software</b>	Laptop
<b>QC Recording Tool</b>	NA
<b>Incentive</b>	NA
<b>Administration</b>	NA
<b>Payment Type</b>	NA
<b>Payment Method</b>	NA

<b>Report Period</b>	Aug, 2019 (EDCPE)	<b>Project Phase</b>	Planning
<b>Risk Level</b>	<i>On Track</i>		
<b>Monthly Update</b>	<p>08/2019</p> <p>EDC is gearing up for training. YCR has had some delay in getting final consent forms and some other materials to us do the EDC team has been working around that. Some manual sections are complete and have already been formatted by Ann V. The respondent booklet is complete and ready to send to printers, arrangements are being made for lwer flights and things are moving along well in terms of preparing for training. Ashanti has been able to work with other projects and team who will be training at the same time, to offset costs on some extra rooms EDC had reserved but will no longer need.</p> <p>One area for concern is delivery of sample; YCR id doubtful that they will be able to deliver a sizeable batch to us immediately after training and think it might be two weeks delayed. They are making all effort to try and get enough that we can give the Interviewers work after training but it looks bleak. SRO EDC team is trying to think of ways to avoid lwer attrition. Carlos will be talking to Sarah Crane to see if she can keep some lwers on for the Chicago study and will be looking into ways to get the Texas lwers work as well if necessary.</p> <p>Budget projections continue to increase and and we are projected ~\$30,000.00 more than the last budget we had formal agreement on payment for. The plan/agreement with YCR is that we would use the first batch as a sort of "pretest" and reevaluate cost several week into production. However, if sample is late coming, and not well distributed, we will not be able to accurately evaluate the hpi and other costs, at least, not in a timely manner.</p> <p>07/2019</p> <p>SRO has obtained written agreement (email) from YCR that they will cover the projected overrun as it stands to date. The agreement is to use the first release as a pilot and to adjust projects as we get a more realistic of what actual costs will be. At that time YC can make decisions about covering any subsequent increased cost or adjust current scope.</p> <p>Preparation is underway for training - including assignment of sections for the training manual and scheduling completion dates. Most of the lwer equipment has already been purchased and Kris (DCS) has started putting together lwer material.</p> <p>YCR still has a few documents to finalize and deliver.</p> <p>06/19</p> <p>Internal discussions about the projected overrun are underway and this topic and a commitment to pay, or adjustment in scope, will be formerly presented to YCR in early July. SurveyTrak specs are being edited with programming to begin in July. Blaise specs, compartmentalized into sections, are almost complete and much of the programming done; only one section is yet to be delivered to the programmer. Programmed sections are now in CTT and are ready of testing. lwer staff will be all on-staffers and so there will be no GIT training. Preparatiosn for training are underway; respondent email box has been set up, procurement activities for equipment has started, Training agenda/schedule is being worked on etc.</p> <p>05/19</p> <p>The EDC team has been notified about a 80% of the over-run. A document is being composed to update them about the remaining over-run. Close scrutiny is being given to all the projections in order to realistically project the true cost that will be incurred to the end of projection before informing the EDC team.</p> <p>Training will be September 16-21, 2019 with the first 2 days being GIT and the remaining being study specific. SRO will be asking EDC for final decision on counties that will be included. EDC has agreed to drop 1 or 2 rural counties that may present difficulties in staffing and increased cost to access.</p> <p>On-staff interview posting is closed. Currently there are 14 on-staffers in Illinois, 12 in Texas, and a potential of 8 travelers from which the management team will make a selection. There likely will be a new hires posting to fully round</p>		

out the team after final decision on on-staffers is made.

04/2019

SRO has a 90% confirmation from CARE Staff that we can train/start production around the end of September, 2019. Due to UM football schedule (home games) SRO has informed CARE staff that we may have to be flexible and consider early October as well based on availability of hotel space. DCS is in the process of securing a training facility but to date nothing has been confirmed as available within a 30 mile radius of UM - still waiting to hear from a few hotels.

The delay, among other factors, has severely affected the budget. More than expected changes in the questionnaire, changes in protocol, rehiring Iwers (due to the delay) and increased management hours due to the delay, are some of the other factors. The role of the community partners as it relates to our relationship/interaction is not clear and we are not sure if that will have any impact on the budget. The client was aware of some of the added costs and in early May, SRO will provide them with more recent updated projections, based on current information and assumptions.

03/2019

Training date of July to be confirmed by April 1st by client. Currently continuing work is being done on Blaise instrument.

02/2019

SRO has received some instrument edits from MEM staff and have started to edit the spec document. Training is being further delayed and the earliest we will train is mid-late July. MEM staff has promised to have final selection of Census tracts to SRO by April 5th, 2019.

01/2019

Final survey edits from study staff promised by Feb 1st. Full modules will NOT be cut but groups of questions are going to be cut. Cog iws will be shorter. Risk pref questions -- these may shift to the data cubed app (most likely going with this). YCR would like to move in the consent to Admin Data - if R has said Yes to this, they will be OKAY to skip the Expenditures/Consumption section. We are assuming we are able to implement this. Actual census tracts -- coming soon, we will take this into account in cost modeling.

Loaner phones -- will be assessing in online screening. If less than 3%, will NOT do loaner phones. SO WILL NOT KNOW THIS UNTIL CLOSE TO TRAINING. What will be that impact?

PLAID -- still progressing on this. Still piloting this and will continue to before enrollments begin.

No April training. Will know in a week or two about how much of a further delay there will. Late July or later is the most likely. There may be cost impacts on this decision. This is a shift back of the field period. They would still want the same length of field period. But would like the end of field period to be before the beginning of a quarter. SRO will still continue on schedule to get everything ready and will get back to YCR about costs.

12/2018

Pilot data collection complete. Data has been delivered. Interviewer materials are being returned. The Study Team has informed SRO that there will be at least a one month delay to the main launch while they ensure that payments to respondents will not affect their (respondents) social benefits. There are changes to payment methods which will need to be programmed in Strak. Changes to questionnaire will not be decided until late January so Blaise spec'ing and programming will be delayed from scheduled dates. However, Study Staff has said that they expect deletions and no additions to the instruments.

11/2018

Pilot Data collection is almost complete, we have a few English speaking cases scheduled for late November after Thanksgiving but data collection will wrap up soon after. To date there have been no Spanish cases although we have one scheduled for Dec 1st. YCR will try to find some Spanish speakers to complete the survey for informational purposes only, no Raven's, Arrow Flanker, or Hearts and Flowers will be completed - the data will not be saved and the participants will receive a one time payment.

Raw survey data was delivered - the data will be cleaned and redelivered in early December.

On-staffers have been hired for 2019 production and posting for new hires will be placed in early January 2019.

10/2018

86/150 cases have been successfully screened. Of those, 49 interviews have been completed, 20 have appts. one was a no show, 6 are resistant, and we are still to schedule 10 lws.

A fair number of interviews are being done at the YCR office - we will not have this luxury for the main production since these will be in Texas and Illinois.

09/2018

MEM Training was held 9/18-9/21, was attended by 5 lwers and 5 YCR Team Members and was successful. Originally scheduled intended to be 3 days, the 4th day was needed. IRB ammendments for Main Research Consent was submitted and approved. Ammendments were subsequently submitted for email text, text message text, Physical measures, and Blood pressure card.

07/2018

MEM received IRB approval with contingencies. Some of the contingencies included verbage in the consent forms. Blaise programming is going well as is STRak. STRak programmer is working on implementing SSN collection while keeping it separate from other Respondent PII. Planning has begun for developing training materials.

06/2018

IRB did a full review and has asked for amendments - mostly centered around cell phone use and user agreement and debit card payments. Pls/Study staff have been working well with SRO to write documentation for IRB.

Blaise and STRak screener have been programmed, CTT has been set up and the screener instrument is being tested by the SRO team. Main Strak, Blaise and Webtrak are being spec'd.

Interviewer training is being pushed back about 5 weeks to 17th (GIT), 18th, 19th, 20th (Study Specific days). This is both due to receiving specs later than scheduled from the Pls as well as by PI request to delay a further week so they can be present.

Pls will decide on the locations for the main study by the end of July.

05/2018

Project Review and Kickoff meeting was held on 05/18/2018. Since then the IRB for the pilot study will be housed at University of Michigan (instead of Stanford) but there is still uncertainty as to where the IRB for the main study will be housed. Shortcodes and authcodes have been created and distributed - however, timesheets were already completed and reversals will be done to correct to MEM work completed in May - MPR will be updated to reflect this.

There is a concern for the length of the instrument - it is currently about 2 hours long and should be reduced to 45 minutes as budgeted. The MEM study staff has missed the initial deadline for delivering a reduced version which has implications for the pilot timeline since the instrument cannot be spec'd properly until we have the final version. There are a few things to be discussed with Study Staff:

- survey length; can they confirm portions that will definitely stay in that we can start spec'ing/programming
- Will we be required to collect SSN
- Delivery/schedule for test and pilot sample
- Plan for giving phones to R; David Bolt (help desk) will join the call to discuss pros/cons of SRO procuring the phones - which is preferable since our lwers will be distributing to R's
- Will R preferred language be a part of the preload

A detailed schedule will be created and will reflect any known delays.

Blaise and STRak speccing will start early June.

## Special Issues

Final Survey version should have been received May 25, not received from Study Staff. Currently 2 hours and should be reduced to 45 minutes. Also has implications for pilot timeline.

Cost  
Jul 31, 2019

<b>Total Cost to Date (Direct + Indirect):</b>	540,829.47
<b>Estimated Cost at Completion (E\$AC):</b>	2,264,180.27
<b>Total Budget:</b>	1,963,818.00
<b>Variance (Budget minus E\$AC):</b>	-300,362.77

**Reason For Variance:**

05/2019

There is a budget overrun due to violation of various assumptions on which the budget was based eg. interview length, production locations, hosting rates, extensive changes to the questionnaire. The EDC team has been notified about a ~80% of the over-run.

01/2019

Production delay has negative impact on cost. management hours have greatly increased.

11/2018

The Pilot revealed - HPI higher than predicted, increased training length for main.

09/2018

Training was longer than budgeted, Interview longer than proposed

08/2018

Clients have made some requests that are not a part of the original proposal - we have projected this so we can have an accurate reflection of cost when we talk to the PIs.

07/2018

Not all costs have been fully projected at this time.

06/2018

Account and shortcodes were not set up in time for May payroll. May charges will be reflected in the June payroll.

Projections  
Jul 31, 2019

**Dollars Projected For Month:**

38,692.99

**Actual Dollars Used:**

42,500.10

**Variance (Projected minus Actual):**

3,807.11

**Reason For Variance:**

6/2019

The hotel deposit cost for training not earlier than was projected.

1/2019

Work delays not fully adjusted for.

12/2018

Hosting charges still have not hit. Work delayed because we did not receive questionnaire spec changes and also because of non-decision on production dates.

11/2018

Some hosting/hotel charges did not hit in November so these projections have been moved to December

10/2018

Less interviews than projected in October

09/2018

Travel and hotel costs have not yet hit the budget - will move those projections to October

07/2018

Training was delayed, these costs should hit in September

06/2018

Projections will be updated.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>			
<b>Goal at Completion:</b>			
<b>Current actual:</b>			
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

**Other Measures**

**Project Name** Health and Retirement Study 2018 (HRS 2018)

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

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

**Budget** ***Direct Budget:*** 13,337,980.00    ***Indirect Budget:*** 4,801,674.00    ***Total Budget:*** 18,139,654.00

**Principal Investigator/Client** David Weir (ISR-SRC)

**Funding Agency**

**IRB** ***HUM#:*** HUM00061128    ***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:*** Jennifer C Arrieta

**Proposal #:** no data

**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 people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain representativeness. 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. A self-administered "leave behind" paper questionnaire is given to respondents interviewed in person.

**SRO Project Period** 01/2018 - 06/2018

**Data Col Period** 04/2018 - 04/2019

**Security Plan** NA

**Milestone Dates**

<i><b>PreProduction Start:</b></i> 01/01/2018	<i><b>Pretest Start:</b></i> 02/02/2018
<i><b>Pretest End:</b></i> 02/10/2018	<i><b>Recruitment Start:</b></i>
<i><b>Staffing Completed:</b></i>	<i><b>GIT Start:</b></i> 04/07/2018
<i><b>SS Train Start:</b></i> 04/09/2018	<i><b>SS Train End:</b></i> 04/14/2018
<i><b>DC Start:</b></i> 04/19/2018	<i><b>DC End:</b></i> 06/01/2019

**Other Project Team Members:** Sharon Parker (Production Management Coordinator), Andrea Sims (Production Manager), Derek Dubuque (Production Manager), Russ Stark (SSL Production Manager), Tony Romanoski (Respondent Contact Coordinator), Dan Tomlin (Project Manager), Lisa deRamos (Project Manager), Daniah Buageila (Lead Project Assistant), Janet McBride (Project Assistant), Anna Fuqua-Smith (Project Assistant), Jeannie Baker (Project Assistant).

**Other Project Names:**

**Sample Mgmt Sys** SurveyTrak; MSMS

**Data Col Tool** Blaise 5; SAQ

**Hardware** Laptop; [UM cell] Phone; Paper and Pencil; Other

**DE Software** NA

**QC Recording Tool** NA

**Incentive** Yes, R; Yes, INF

**Administration** NA

**Payment Type** Check, prepaid (80.00); Cash, post (20.00)

**Payment Method** Check through STRak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox)

**Report Period** Aug, 2019 (HRS 2018)    **Project Phase** Closing

**Risk Level** Some Concerns

**Monthly Update** HRS 2018: During month of August, the team focused on addressing questions from project staff and on whole blood draw data collection. Whole blood draw data collection will continue through December 2019 due to the delay caused by change in vendors.

HRS 2019 (EGenX): Data collection began on 1 July. The sample is a subset (n=2,959) of the 2016 pre-identified Early Generation X (EGenX) cohort. As of today there are 434 completed interviews with 84 appointments for the

coming weeks (goal # of interviews is 579). The overall average interview length is currently 57.9 minutes. Cost to complete is estimated at \$945,675.30 which is \$27,000 above the approved ballpark (\$790,200-\$918,300). Project staff has confirmed the primary goal for the project is to find and make contact with the EGenX respondents (to date to date we have found/made contact with 52% of the sample). Project staff have also approved an across the board mode change to phone for the baseline interview to help build in some efficiency.

#### Special Issues

<b>Cost</b> Jul 31, 2019	<b>Total Cost to Date (Direct + Indirect):</b>	18,254,467.19
	<b>Estimated Cost at Completion (E\$AC):</b>	18,138,286.17
	<b>Total Budget:</b>	18,139,654.00
	<b>Variance (Budget minus E\$AC):</b>	-1,221,414.17
	<b>Reason For Variance:</b>	We were approximately 21,000 interviewer hours over the budgeted amount (due to the high HPI) in order to attain the 74% response rate. In addition, Whole Blood Draw data collection will extend through December 2019. The estimated overrun is \$1.2 million.

<b>Projections</b> Jul 31, 2019	<b>Dollars Projected For Month:</b>	32,700.80
	<b>Actual Dollars Used:</b>	47,591.92
	<b>Variance (Projected minus Actual):</b>	-14,891.12
	<b>Reason For Variance:</b>	Higher than projected staff hours for close-out activities that had not been accurately projected (projections for remainder of close-out period have been updated).

<b>Measures</b>			
	<b>Units Complete</b>	<b>RR</b>	<b>HPI</b>
<b>Current Goal:</b>	19,012	77%	8.7
<b>Goal at Completion:</b>	19,012	77%	8.0
<b>Current actual:</b>	18,247*	74%	8.7
<b>Estimate at Complete:</b>	18,247	74%	8.9
<b>Variance:</b>	-901	-3%	0.9

**Other Measures**      \*Including preferred mode web interviews (n=1,823)



<b>Project Name</b>	Health and Retirement Study 2020 (HRS 2020)												
<b>Project Mode</b>	Primary: Mixed	Secondary: Web	Total of Modes: 3										
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b> Current										
<b>Budget</b>	<b>Direct Budget:</b> 11,961,346.00	<b>Indirect Budget:</b> 4,306,085.00	<b>Total Budget:</b> 16,267,431.00										
<b>Principal Investigator/Client</b>	David Weir (ISR-SRC)												
<b>Funding Agency</b>													
<b>IRB</b>	<b>HUM#:</b> HUM00061128	<b>Period Of Approval:</b>	10/3/18-10/2/19										
<b>Project Team</b>	<b>Project Lead:</b> Evanthia Leissou <b>Budget Analyst:</b> Richard Warren Krause <b>Production Manager:</b> Andrea Pierce <b>Senior Project Advisor:</b> Nicole G Kirgis <b>Production Manager:</b> Jennifer C Arrieta <b>Production Manager:</b> Rebecca Gatward												
<b>Proposal #:</b>	no data												
<b>Description:</b>	<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 people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers 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 is requested.</p>												
<b>SRO Project Period</b>	01/2019 - 08/2021												
<b>Data Col Period</b>	03/2020 - 03/2021												
<b>Security Plan</b>	NA												
<b>Milestone Dates</b>	<table border="1" style="width: 100%;"> <tr> <td><b>PreProduction Start:</b> 01/01/2019</td> <td><b>Pretest Start:</b> 11/11/2019</td> </tr> <tr> <td><b>Pretest End:</b> 11/23/2019</td> <td><b>Recruitment Start:</b> 09/01/2019</td> </tr> <tr> <td><b>Staffing Completed:</b> 12/15/2019</td> <td><b>GIT Start:</b> 02/17/2020</td> </tr> <tr> <td><b>SS Train Start:</b> 02/19/2020</td> <td><b>SS Train End:</b> 02/26/2020</td> </tr> <tr> <td><b>DC Start:</b> 03/02/2020</td> <td><b>DC End:</b> 03/27/2021</td> </tr> </table>			<b>PreProduction Start:</b> 01/01/2019	<b>Pretest Start:</b> 11/11/2019	<b>Pretest End:</b> 11/23/2019	<b>Recruitment Start:</b> 09/01/2019	<b>Staffing Completed:</b> 12/15/2019	<b>GIT Start:</b> 02/17/2020	<b>SS Train Start:</b> 02/19/2020	<b>SS Train End:</b> 02/26/2020	<b>DC Start:</b> 03/02/2020	<b>DC End:</b> 03/27/2021
<b>PreProduction Start:</b> 01/01/2019	<b>Pretest Start:</b> 11/11/2019												
<b>Pretest End:</b> 11/23/2019	<b>Recruitment Start:</b> 09/01/2019												
<b>Staffing Completed:</b> 12/15/2019	<b>GIT Start:</b> 02/17/2020												
<b>SS Train Start:</b> 02/19/2020	<b>SS Train End:</b> 02/26/2020												
<b>DC Start:</b> 03/02/2020	<b>DC End:</b> 03/27/2021												
<b>Other Project Team Members:</b>	Derek Dubuque (Production Manager), Sharon Parker (Production Management Coordination), Dan Tomlin (Project Manager), Leah Roberts (Training Coordinator), Daniah Buageila (Lead Project Assistant), Anna Fuqua-Smith (Project Assistant), Janet McBride (Project Assistant)												
<b>Other Project Names:</b>													
<b>Sample Mgmt Sys</b>	SurveyTrak; MSMS												
<b>Data Col Tool</b>	Blaise 5												
<b>Hardware</b>	Laptop; [UM cell] Phone; Paper and Pencil												
<b>DE Software</b>	Other (Blaise 5 Coding Application); External vendor (Data Force Scanning SAQs)												
<b>QC Recording Tool</b>	Camtasia												
<b>Incentive</b>	Yes, R; Yes, INF												
<b>Administration</b>	NA												
<b>Payment Type</b>	Check, prepaid (80.00); Check, post (\$50); Cash, post (20.00); Other (Money Order (by request))												
<b>Payment Method</b>	Check through STrak RPay System; Check through other system (Rpay system set up for MSMS); Interviewer p												

<b>Report Period</b>	Aug, 2019 (HRS 2020)	<b>Project Phase</b>	Planning
<b>Risk Level</b>	Some Concerns		
<b>Monthly Update</b>	During the month of August, the team focused on technical development, training coordination, and documentation comparing 2020 budget to projections. HRS 2020 Pretest is planned for early November 2019. Main training and the data collection will begin in February 2020.		
<b>Special Issues</b>			

**Cost**  
**Aug 31, 2019**

**Total Cost to Date (Direct + Indirect):** 283,967.53  
**Estimated Cost at Completion (E\$AC):** 17,459,344.65  
**Total Budget:** 16,267,431.00  
**Variance (Budget minus E\$AC):** -1,191,913.65  
**Reason For Variance:**

The 6 year renewal proposal, which includes 2020, was based on a targeted dollar amount. 2020 projections are based the 2020 budgeted overall response rate and 2018 actuals. Estimated over-run is \$1.2 million.

**Projections**  
**Aug 31, 2019**

**Dollars Projected For Month:** 154,471.57  
**Actual Dollars Used:** 148,146.67  
**Variance (Projected minus Actual):** 6,324.90  
**Reason For Variance:**

Staff hours were under projections due to out of office time and effort needed for the HRS EgenX project. Hours have been pushed forward into future months.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>			
<b>Goal at Completion:</b>	19,542*	83%	8.7
<b>Current actual:</b>			
<b>Estimate at Complete:</b>	19,542	83%	8.7
<b>Variance:</b>	0	0	0

**Other Measures**

\*including preferred mode web

<b>Project Name</b>	Health and Wellbeing in Southeast Michigan (H&WB)													
<b>Project Mode</b>	Primary: Face to Face      Total of Modes: 1													
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current										
<b>Budget</b>	<b>Direct Budget:</b>	1,375,508.00	<b>Indirect Budget:</b>	770,285.00 <b>Total Budget:</b> 2,145,793.00										
<b>Principal Investigator/Client</b>	Kristine Ajrouch (Life Course Development Program, SRC) Toni Antonucchi (Life Course Development Program, SRC) Laura Zahodne (Life Course Development Program, SRC)													
<b>Funding Agency</b>														
<b>IRB</b>	<b>HUM#:</b>	HUM00146040	<b>Period Of Approval:</b>	4/9/2020										
<b>Project Team</b>	<b>Project Lead:</b>	Juan Carlos Donoso												
	<b>Budget Analyst:</b>	Parina Kamdar												
	<b>Production Manager:</b>	Theresa Camelo												
	<b>Senior Project Advisor:</b>	Kirsten Haakan Alcser												
	<b>Production Manager:</b>	Ian Ogden												
	<b>Production Manager:</b>	Lisa Van Havermaet												
<b>Proposal #:</b>	no data													
<b>Description:</b>	Conduct 600 interviews with recently identified Arab Americans aged 65 or older residing in Southeast Michigan and 330 interviews with Social Relations sample members aged 65 or older. The Arab American sample will be selected based on an in-person household screening. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements. Social Relations respondents will only complete the cognitive interview. An informant interview will also be conducted for all sample members. Interviews will be conducted in English or Arabic. A pretest will be conducted in August 2019 with main data collection occurring from November 2019 through July 2020.													
<b>SRO Project Period</b>	05/2019 - 08/2020													
<b>Data Col Period</b>	11/2019 - 07/2020													
<b>Security Plan</b>	No													
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"><b>PreProduction Start:</b> 05/01/2019</td> <td style="padding: 5px;"><b>Pretest Start:</b> 11/12/2019</td> </tr> <tr> <td style="padding: 5px;"><b>Pretest End:</b> 12/13/2019</td> <td style="padding: 5px;"><b>Recruitment Start:</b> 08/15/2019</td> </tr> <tr> <td style="padding: 5px;"><b>Staffing Completed:</b> 03/01/2019</td> <td style="padding: 5px;"><b>GIT Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>SS Train Start:</b></td> <td style="padding: 5px;"><b>SS Train End:</b></td> </tr> <tr> <td style="padding: 5px;"><b>DC Start:</b> 04/01/2020</td> <td style="padding: 5px;"><b>DC End:</b> 11/30/2020</td> </tr> </table>				<b>PreProduction Start:</b> 05/01/2019	<b>Pretest Start:</b> 11/12/2019	<b>Pretest End:</b> 12/13/2019	<b>Recruitment Start:</b> 08/15/2019	<b>Staffing Completed:</b> 03/01/2019	<b>GIT Start:</b>	<b>SS Train Start:</b>	<b>SS Train End:</b>	<b>DC Start:</b> 04/01/2020	<b>DC End:</b> 11/30/2020
<b>PreProduction Start:</b> 05/01/2019	<b>Pretest Start:</b> 11/12/2019													
<b>Pretest End:</b> 12/13/2019	<b>Recruitment Start:</b> 08/15/2019													
<b>Staffing Completed:</b> 03/01/2019	<b>GIT Start:</b>													
<b>SS Train Start:</b>	<b>SS Train End:</b>													
<b>DC Start:</b> 04/01/2020	<b>DC End:</b> 11/30/2020													
<b>Other Project Team Members:</b>	Taghraid Lovell, Becky Scherr, Kallan Larsen, Dan Zahs, Pam Swanson, Dave Dybicki, Ashwin Dey, Brad Goodwin, John Gawlas, Paul Burton													
<b>Other Project Names:</b>	Alzheimer's Disease Risk and Ethnic Factors: The Case of Arab Americans													
<b>Sample Mgmt Sys</b>	SurveyTrak													
<b>Data Col Tool</b>	Blaise 4.8													
<b>Hardware</b>	Laptop; [UM cell] Phone; Paper and Pencil													
<b>DE Software</b>	Other (Weblog possibly)													
<b>QC Recording Tool</b>	DRI-CARI; Camtasia													
<b>Incentive</b>	Yes, R; Yes, INF													
<b>Administration</b>	SRO Group													
<b>Payment Type</b>	Cash, prepaid (\$60, \$15)													
<b>Payment Method</b>	Interviewer payment of cash (reimbursed/reconciled via Tenrox)													

<b>Report Period</b>	Aug, 2019 (H&WB)	<b>Project Phase</b>	Planning
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<b>Risk Level</b>	On Track
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<b>Monthly Update</b>	<p>The project team continues to work on programming the instruments, testing SurveyTrak and the instruments, study protocols and training plans. Physical measures equipment has been ordered and saliva collection options have been determined. The initial IRB submission was reviewed and comments received by the reviewer have been discussed. Two issues that will affect SRO systems and instrument development are whether the waiver for informed consent will be accepted by the IRB and whether the path for determining capacity to consent will be accepted. Five pretest interviewers were hired in August; 3 are bilingual, two are not bilingual in Arabic. A training agenda for the pretest interviewers will be developed next month.</p>
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**Special Issues**

Duplicating, lab supplies and interviewer time that had been budgeted for pretest training were not used because pretest got pushed.

**Cost**  
**Sep 30, 2019**

**Total Cost to Date (Direct + Indirect):** 204,077.78  
**Estimated Cost at Completion (E\$AC):** 2,226,904.75  
**Total Budget:** 2,145,793.00  
**Variance (Budget minus E\$AC):** 81,111.75  
**Reason For Variance:**

The additional days of interviewer training, additional core interview for Social Relations sample, additional programming time and project timeline shift has led to a projected overrun. However, this should be covered by the saliva collection supplemental funding. It is recommended that the budget be reassessed once data collection is underway to determine whether the initial assumptions used for budgeting are still accurate.

**Projections**  
**Sep 30, 2019**

**Dollars Projected For Month:** 71,507.00  
**Actual Dollars Used:** 62,843.51  
**Variance (Projected minus Actual):** 9,000.95  
**Reason For Variance:**

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b> <b>Goal at Completion:</b> <b>Current actual:</b> <b>Estimate at Complete:</b> <b>Variance:</b>			

**Other Measures**

<b>Project Name</b>	Housing & Children (HCDC, H&C)			
<b>Project Mode</b>	Primary: Face to Face      Total of Modes: 1			
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current
<b>Budget</b>	<b>Direct Budget:</b>	9,647,688.00	<b>Indirect Budget:</b>	2,195,370.00
			<b>Total Budget:</b>	11,843,058.00

**Principal Investigator/Client**

**Funding Agency**

**IRB**      **HUM#:** HUM00114794      **Period Of Approval:**

**Project Team**

<b>Project Lead:</b>	Barbara Lohr Ward
<b>Budget Analyst:</b>	Parina Kamdar
<b>Production Manager:</b>	Veronica Connors-Burge
<b>Senior Project Advisor:</b>	Grant D Benson
<b>Production Manager:</b>	Becky Kay Scherr
<b>Production Manager:</b>	Katherine McFall Blackburn

**Proposal #:** no data

**Description:**

Low-income parents face serious constraints when they seek housing, and these constraints may undermine their childrens' 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 socio-emotional 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.

The project proposes to conduct two waves of data collection, separated by about 12 months, with families in Seattle, Dallas and Cleveland. In-person interviews will be completed with ~ 1686 parents and 2328 children aged 3-10 (at Wave 1). One-half of the sample will be an experimental sample consisting of applicants for a federal housing voucher. This experiment sample will include both voucher winners (treatment group) and voucher losers (control group). The other half of the sample will be generated through a random selection and screening process in census blocks that vary by household income weighted toward lower-income blocks. Each interview with an adult will last about 90 minutes, and will include the collection of anthropometric measures from all sample persons (including children), administration of Woodcock-Johnson tests to children. Adult Voucher sample participants will be asked for three blood pressure measurements, and blood spots will be collected from Voucher sample adults and children. The data collection also includes collecting laser tape measurement of all rooms in a household, 8 block face neighborhood observations, a four-day leave-behind child time diary, and post-interview observations.

**SRO Project Period** 04/2016 - 02/2020

**Data Col Period** 05/2017 - 09/2018

**Security Plan** NA

**Milestone Dates**

**PreProduction Start:** 09/01/2018

**Pretest End:**

**Staffing Completed:** 03/01/2020

**SS Train Start:** 04/16/2020

**DC Start:** 04/24/2020

**Pretest Start:**

**Recruitment Start:** 09/01/2019

**GIT Start:** 04/13/2020

**SS Train End:** 05/18/2017

**DC End:** 11/30/2020

**Other Project**

**Team Members:**

<b>Other Project Names:</b>	Housing & Children's Healthy Development
<b>Sample Mgmt Sys</b>	SurveyTrak; SMS; Illume
<b>Data Col Tool</b>	Blaise 4.8; SAQ
<b>Hardware</b>	Laptop; Desktop; [UM cell] Phone; Paper and Pencil; Other (laser measurement device)
<b>DE Software</b>	Blaise 4.8 BIA ; External vendor (CASO - scanning)
<b>QC Recording Tool</b>	DRI-CARI
<b>Incentive</b>	Yes, R; Yes, INF; Yes, Other (screening households)
<b>Administration</b>	SRO Group
<b>Payment Type</b>	Cash, prepaid (\$5 for subsample, \$2 prenotification); Cash, post (\$75 adult, \$50 child); Other (child gift <\$5, Fir
<b>Payment Method</b>	Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office

<b>Report Period</b>	Aug, 2019 (HCDC, H&C)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	<i>Some Concerns</i>		
<b>Monthly Update</b>	<p>During August 2019, SRC activities included the following:</p> <p>Task 1: Management, Budget and Work Plan</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> <li>Participated in monthly project meeting with research team to discuss scope, cost projections and schedule.</li> <li>Reviewed/monitored project expenses. Revised and adjusted monthly projections.</li> <li>Monitored subcontracts and project invoicing and payments.</li> <li>Corresponded with UM IRB regarding Wave 2 submissions.</li> <li>Finalized staffing for Wave 2 project management team.</li> <li>Provided updates to SRO technical team regarding Wave 2 schedule, work scope and staffing needs.</li> <li>Responded to research team inquiries on project schedule and costs.</li> <li>Edited and delivered Wave 2 PCG questionnaire.</li> <li>Edited Household questionnaire.</li> </ul> <p>Task 2: Sampling</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> <li>Worked on technical reports.</li> </ul> <p>Task 3: Questionnaire Development</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> <li>See Task 1 Management for work performed by management staff.</li> </ul> <p>Task 4: CAI Programming</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> <li>No effort this month.</li> </ul> <p>Task 5: Systems Programming</p> <p>% Task Spent to date</p> <ul style="list-style-type: none"> <li>No effort this month.</li> </ul> <p>Tasks 6, 7: Interviewer Recruitment &amp; Hiring, Training</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> <li>Met to discuss Wave 2 training schedule, conference and facility needs. Prepared bid documents for conference facilities.</li> <li>Prepared and submitted posting for production coordinator, team leaders, locators and on-staff interviewers.</li> </ul> <p>Task 8: Main Data Collection</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> <li>No effort this month</li> </ul> <p>Task 9: Post Collection Processing</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> <li>No effort this month</li> </ul> <p>Task 10: Weighting</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> <li>No effort this month</li> </ul> <p>Task 11: Final Data Deliverables</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> <li>No effort this month</li> </ul>		

**Special Issues**

Areas of Concern (changes shown in italics):

**Wave 2**

- Unresolved issues between JHU and NICHD, which have led to non-payment of UM invoices may lead to termination of one grant by UM OSRP.
- The PCG questionnaires (in-area and out-of-area) for Wave 2 must be completed by Aug 9 in order to remain within revised budget and schedule for the Wave 2 launch. Delays will impact staffing levels and IRB schedule for Wave 2, leading to increased costs over what is currently projected.
- Programming hours for fundamental structural changes to the Wave 2 PCG instrument and the addition of a household screener/exit interview may exceed the budget, which assumed only 25% programming change between Waves.
- High interviewer attrition at Wave 1 and 1 year delay of data collection will require either that the project hire more new interviewers at Wave 2 than planned (24 new hires anticipated at Wave 2) or that we plan for a larger number of traveling on-staff interviewers than originally budgeted. The higher number of new hires will require the addition of one team leader to the field management staff; a higher number of traveling interviewers will increase travel costs.
- A delay in data collection field period will increase fixed costs associated with data collection activities. Delays will also impact hourly rates for all staff including data collection staff, may lead to increased locating costs, and will likely impact the number of new hires needed.
- Delays in the start of respondent contact/locating efforts may lead to more intensive locating needs during the Wave 2 data collection, over and above what has been budgeted.

**Wave 2 Work Scope Changes:**

- Questionnaire Development – Budgets assumed that final clean copies of all instruments were delivered by early September to allow for review and programming specification delivery. Initial PCG instrument covering single scenario (in-area, fully intact families) delivered 9/30; self-administered questionnaire markups were delivered on October 25; out-of-area PCG instrument markup was delivered November 5.
- A household screener/exit interview has been developed and will be programmed to facilitate locating children who do not live with the Wave 1 PCG. The instrument will collect contact information for new PCGs (approved by PIs).
- Budgets assumed the self-administered questionnaires (SAQ) would be a total of 8-10 pages in length for both household and child SAQs. Current W2 SAQ specifications have the household length at 19 pages.. This will have a negative impact on printing and mailing costs.
- The start of Wave 2 is being delayed until April/May 2020. This will impact the cost of pre-production, respondent locating, and likely also impact the cost of interviewer hiring and training.
- The population sample will be reduced to accommodate cost increased related to the project delay.

**Cost  
Aug 28, 2019**

<b>Total Cost to Date (Direct + Indirect):</b>	8,951,017.88
<b>Estimated Cost at Completion (E\$AC):</b>	11,862,693.76
<b>Total Budget:</b>	11,843,058.00
<b>Variance (Budget minus E\$AC):</b>	-19,635.76
<b>Reason For Variance:</b>	The delay in the project, combined with unanticipated additional effort to resolve funding issues between JHU and NICHD, and additional project management burden have led to the overrun. Our assumption is that we will manage the project to the budget, reducing scope as necessary.

**Projections  
Aug 28, 2019**

<b>Dollars Projected For Month:</b>	17,587.56
<b>Actual Dollars Used:</b>	13,431.50
<b>Variance (Projected minus Actual):</b>	4,156.06
<b>Reason For Variance:</b>	The variance is due to the cost of SHV and Fringe in July.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>			
<b>Goal at Completion:</b>			
<b>Current actual:</b>			
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

**Other Measures**

**Project Name** HRS 2019 Actigraphy Pilot (HRS Actigraphy Pilot)

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

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

**Budget** ***Direct Budget:*** 54,713.00      ***Indirect Budget:*** 19,697.00      ***Total Budget:*** 74,410.00

**Principal Investigator/Client** Jessica Faul (UM SRC)

**Funding Agency**

**IRB** ***HUM#:*** HUM00162561      ***Period Of Approval:*** 04/2019-06/2019

**Project Team** ***Project Lead:*** Daniel Tomlin  
***Budget Analyst:*** Richard Warren Krause  
***Production Manager:***  
***Senior Project Advisor:*** Nicole G Kirgis  
***Production Manager:*** Anna Fuqua-Smith  
***Production Manager:*** James Koopman

**Proposal #:** no data

**Description:** The HRS Actigraphy Pilot is a new study in 2019. The goal of the pilot is to test our protocol for using GeneActiv activity monitors to collect physical activity and sleep data from HRS respondents. A sample of HRS respondents who participated in 2018 data collection have been selected for this effort, with approximately 400 assigned to the actigraphy pilot treatment.

During the production period, we will contact respondents with a maximum of five mailings. Below is the protocol for this mail survey:

- The 400 eligible respondents will receive an invitation letter, informed consent (two copies – one to complete and return, and one to keep for their records), a \$25 token of appreciation, and a pre-addressed, pre-paid return envelope, via metered mail (these will happen in staggered batches by time zone).
- If a consent form is not returned within two weeks, a reminder postcard will be sent to the respondent as follow-up, via metered mail.
- Upon receipt of consent, an enrollment letter is sent to respondents along with an activity monitor, a brief questionnaire and sleep diaries, instructions for using the device, and a pre-addressed, pre-paid return envelope, via metered mail.
- If the device and questionnaire are not received within two weeks of the expected return date (based on the 10 -day measurement period plus 3 days expected for return following this period), a device and questionnaire return reminder postcard will be sent via metered mail.
- After study materials are received and data extracted and aggregated from the devices, a thank you letter along with a results letter (showing average sleep and activity results from the 10-day wear trial) or letter indicating that results were not reportable, and an additional \$25 token of appreciation will be mailed to each respondent via metered mail.

**SRO Project Period** 01/2019 - 12/2019

**Data Col Period** 06/2019 - 11/2019

**Security Plan** NA

**Milestone Dates**

<i><b>PreProduction Start:</b></i>	<i><b>Pretest Start:</b></i>
<i><b>Pretest End:</b></i>	<i><b>Recruitment Start:</b></i>
<i><b>Staffing Completed:</b></i>	<i><b>GIT Start:</b></i>
<i><b>SS Train Start:</b></i>	<i><b>SS Train End:</b></i>
<i><b>DC Start:</b></i> 06/25/2019	<i><b>DC End:</b></i> 10/31/2019

**Other Project** The project team will consist of regular SSL help for mailings and logging in addition to the following:

**Team Members:** Project Assistant: Anna Fuqua-Smith  
 Project Manager: Dan Tomlin, James Koopman  
 Data Manager: Tim Wright  
 WebLog Programmer: Ashwin Dey  
 SPA: Nicole Kirgis



<b>Other Project Names:</b>	University of Michigan Activity and Sleep Study
<b>Sample Mgmt Sys</b>	Other (WebLog)
<b>Data Col Tool</b>	Other (WebLog)
<b>Hardware</b>	Paper and Pencil; Other (GeneActiv Device)
<b>DE Software</b>	Excel; Other (WebLog)
<b>QC Recording Tool</b>	N/A
<b>Incentive</b>	Yes, R
<b>Administration</b>	SRO Group
<b>Payment Type</b>	Check, prepaid (\$25); Check, post (\$25)
<b>Payment Method</b>	Check through other system (Excel)

Report Period	Aug, 2019 (HRS Actigraphy Pilot)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	In August we finalized our consent mailings and put our focus towards devices. We have been sending and receiving devices as the primary source of our work this month. We put together a process for pulling data off devices and delivering that data to respondents and have been working on streamlining this process. In addition, we started full time loggers tasked with piecing together device mailings and logging any returns that come in throughout the week.		
Special Issues	N/A		
Cost			
Jul 31, 2019	Total Cost to Date (Direct + Indirect):	31,466.89	
	Estimated Cost at Completion (E\$AC):	72,472.17	
	Total Budget:	74,410.00	
	Variance (Budget minus E\$AC):	1,937.83	
	Reason For Variance:	As of early August we had just mailed out our final consent mailing. We may see a slight uptick in consent but EAC may be slightly lower due to less response than expected.	
Projections			
Jul 31, 2019	Dollars Projected For Month:	24,785.45	
	Actual Dollars Used:	14,840.93	
	Variance (Projected minus Actual):	9,944.52	
	Reason For Variance:	Salary costs were slightly lower than expected, duplicating has been relatively cheap, postage hasn't hit in full because we have not finished all of our mailings, and respondent costs are lower than expected due to consent	

Measures	Units Complete	RR	HPI
<b>Current Goal:</b>			
<b>Goal at Completion:</b>	250	78%	
<b>Current actual:</b>			
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

Other Measures

<b>Project Name</b>	HRS 2019 Consumption and Activity Mail Study (CAMS 2019)													
<b>Project Mode</b>	Primary: Mail      Total of Modes: 1													
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current										
<b>Budget</b>	<b>Direct Budget:</b>	305,282.00	<b>Indirect Budget:</b>	109,901.56 <b>Total Budget:</b> 415,183.56										
<b>Principal Investigator/Client</b>	David Weir (ISR-SRC)													
<b>Funding Agency</b>	NIH													
<b>IRB</b>	<b>HUM#:</b>	HUM00079949	<b>Period Of Approval:</b>	2/14/2019 - 2/13/202										
<b>Project Team</b>	<b>Project Lead:</b>	Anna Fuqua-Smith												
	<b>Budget Analyst:</b>	Grace Tison												
	<b>Production Manager:</b>													
	<b>Senior Project Advisor:</b>	Nicole G Kirgis												
	<b>Production Manager:</b>	Jennifer C Arrieta												
	<b>Production Manager:</b>	Daniel Tomlin												
<b>Proposal #:</b>	no data													
<b>Description:</b>	CAMS is part of the Health and Retirement Study (HRS). The goal of CAMS is to gather additional data on household consumption and activities of daily living from participants in the HRS. In 2019, a paper questionnaire will be mailed to approximately 8,000 respondents of which 6,000 will receive the full questionnaire and 2,000 spouse/partners will receive a brief questionnaire.													
<b>SRO Project Period</b>	05/2019 - 05/2020													
<b>Data Col Period</b>	09/2019 - 04/2020													
<b>Security Plan</b>	NA													
<b>Milestone Dates</b>	<table border="1" style="width: 100%;"> <tr> <td><b>PreProduction Start:</b> 05/01/2019</td> <td><b>Pretest Start:</b></td> </tr> <tr> <td><b>Pretest End:</b></td> <td><b>Recruitment Start:</b></td> </tr> <tr> <td><b>Staffing Completed:</b></td> <td><b>GIT Start:</b></td> </tr> <tr> <td><b>SS Train Start:</b></td> <td><b>SS Train End:</b></td> </tr> <tr> <td><b>DC Start:</b></td> <td><b>DC End:</b> 04/30/2020</td> </tr> </table>				<b>PreProduction Start:</b> 05/01/2019	<b>Pretest Start:</b>	<b>Pretest End:</b>	<b>Recruitment Start:</b>	<b>Staffing Completed:</b>	<b>GIT Start:</b>	<b>SS Train Start:</b>	<b>SS Train End:</b>	<b>DC Start:</b>	<b>DC End:</b> 04/30/2020
<b>PreProduction Start:</b> 05/01/2019	<b>Pretest Start:</b>													
<b>Pretest End:</b>	<b>Recruitment Start:</b>													
<b>Staffing Completed:</b>	<b>GIT Start:</b>													
<b>SS Train Start:</b>	<b>SS Train End:</b>													
<b>DC Start:</b>	<b>DC End:</b> 04/30/2020													
<b>Other Project Team Members:</b>	Data Manager: Tim Wright Programmer: Ashwin Dey Project Assistant: Janet McBride, Debra Heier													
<b>Other Project Names:</b>	CAMS													
<b>Sample Mgmt Sys</b>	Other (Weblog)													
<b>Data Col Tool</b>	SAQ													
<b>Hardware</b>	Paper and Pencil													
<b>DE Software</b>	Other (HRS study staff is responsible for)													
<b>QC Recording Tool</b>	N/A													
<b>Incentive</b>	Yes, R; Yes, Other (Spouse)													
<b>Administration</b>	NA													
<b>Payment Type</b>	Check, prepaid (\$25 to main R and \$10 to spouse R)													
<b>Payment Method</b>	Check through other system (Submit excel file to business office)													

<b>Report Period</b>	Aug, 2019 (CAMS 2019)	<b>Project Phase</b>	Initiation
<b>Risk Level</b>	On Track		
<b>Monthly Update</b>	During August, the team worked on quality control of the respondent sample. We also worked on gathering quotes for respondent materials and made orders for supplies.		
<b>Special Issues</b>			

**Cost**  
**Jul 31, 2019**

**Total Cost to Date (Direct + Indirect):** 5,823.29  
**Estimated Cost at Completion (E\$AC):** 415,183.91  
**Total Budget:** 415,183.56  
**Variance (Budget minus E\$AC):** 3,530.91  
**Reason For Variance:** Projections are being revised for salary employees, so this overrun should be resolved shortly.

**Projections**  
**Jul 31, 2019**

**Dollars Projected For Month:** 5,942.36  
**Actual Dollars Used:** 4,196.59  
**Variance (Projected minus Actual):** 1,745.77  
**Reason For Variance:** Staff hours projected in July will be used in future months.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>	5,778	66.4%	
<b>Goal at Completion:</b>	5,778	66.4%	
<b>Current actual:</b>			
<b>Estimate at Complete:</b>		66.4%	
<b>Variance:</b>			

**Other Measures**

<b>Project Name</b>	HRS Enhancing Retrospective Life History Data 2019 (HRS - LHMS 2019)																							
<b>Project Mode</b>	Primary: Mail	Secondary: Telephone	Total of Modes: 2																					
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current																				
<b>Budget</b>	<b>Direct Budget:</b>	443,077.00	<b>Indirect Budget:</b>	248,124.00																				
			<b>Total Budget:</b>	691,201.00																				
<b>Principal Investigator/Client</b>	Jacqui Smith (SRC) David Weir (SRC)																							
<b>Funding Agency</b>																								
<b>IRB</b>	<b>HUM#:</b>	HUM00106904	<b>Period Of Approval:</b>	5/28/2020																				
<b>Project Team</b>	<b>Project Lead:</b>	Barbara Lohr Ward																						
	<b>Budget Analyst:</b>	Parina Kamdar																						
	<b>Production Manager:</b>																							
	<b>Senior Project Advisor:</b>	Nicole G Kirgis																						
	<b>Production Manager:</b>	Becky Kay Scherr																						
	<b>Production Manager:</b>	James Koopman																						
<b>Proposal #:</b>	no data																							
<b>Description:</b>	<p>LHMS is part of the Health and Retirement Study (HRS). The goal of LHMS is to give participants an opportunity to share significant events that shaped their lives, reflect on their life history and share where they have lived, went to school, and what important events occurred in their lives. Information like this allows researchers to understand how individuals' pasts shape their health and economic situations today.</p> <p>In May 2019 (contingent upon IRB approval), a paper questionnaire will be mailed to a sample of approximately 3,436 HRS Respondents in the Late Baby Boomer cohort. From this sample, approximately 2,061 completed surveys are expected (60% response rate). Data collection will include questionnaire mailings and reminder/thank you postcard mailings.</p> <p>In addition, SRO will conduct a non-response follow up calling effort (scheduled for summer 2019) on a sample of 1,279 non-respondents from previous Life History Mail Survey initiatives. This involves sending a questionnaire followed by telephone contact attempts if the questionnaire has not been returned after four weeks. SRO will attempt to complete the 60-minute interview by telephone using the paper questionnaire. From this sample, approximately 640 completed questionnaires/interviews are expected.</p>																							
<b>SRO Project Period</b>	04/2019 - 03/2020																							
<b>Data Col Period</b>	06/2019 - 09/2019																							
<b>Security Plan</b>	NA																							
<b>Milestone Dates</b>	<table border="1" style="width: 100%;"> <tr> <td><b>PreProduction Start:</b></td> <td>04/01/2016</td> <td><b>Pretest Start:</b></td> <td></td> </tr> <tr> <td><b>Pretest End:</b></td> <td></td> <td><b>Recruitment Start:</b></td> <td>06/01/2016</td> </tr> <tr> <td><b>Staffing Completed:</b></td> <td>06/28/2019</td> <td><b>GIT Start:</b></td> <td></td> </tr> <tr> <td><b>SS Train Start:</b></td> <td>06/12/2019</td> <td><b>SS Train End:</b></td> <td>06/12/2019</td> </tr> <tr> <td><b>DC Start:</b></td> <td>06/18/2019</td> <td><b>DC End:</b></td> <td>10/25/2019</td> </tr> </table>				<b>PreProduction Start:</b>	04/01/2016	<b>Pretest Start:</b>		<b>Pretest End:</b>		<b>Recruitment Start:</b>	06/01/2016	<b>Staffing Completed:</b>	06/28/2019	<b>GIT Start:</b>		<b>SS Train Start:</b>	06/12/2019	<b>SS Train End:</b>	06/12/2019	<b>DC Start:</b>	06/18/2019	<b>DC End:</b>	10/25/2019
<b>PreProduction Start:</b>	04/01/2016	<b>Pretest Start:</b>																						
<b>Pretest End:</b>		<b>Recruitment Start:</b>	06/01/2016																					
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<b>SS Train Start:</b>	06/12/2019	<b>SS Train End:</b>	06/12/2019																					
<b>DC Start:</b>	06/18/2019	<b>DC End:</b>	10/25/2019																					
<b>Other Project Team Members:</b>	Nicole Kirgis, SPA Barbara Ward, Surv Dir Parina Kamdar, Budget Analyst Becky Scherr, SSA James, Koopman, SSI Holly Ackerman, Programmer Dave Dybicki, Programmer																							

<b>Other Project Names:</b>	2019 LHMS
<b>Sample Mgmt Sys</b>	SMS; Project specific system (Weblog)
<b>Data Col Tool</b>	SAQ
<b>Hardware</b>	Desktop; Paper and Pencil
<b>DE Software</b>	NA
<b>QC Recording Tool</b>	NA
<b>Incentive</b>	Yes, R
<b>Administration</b>	SRO Group
<b>Payment Type</b>	Check, prepaid (\$25)
<b>Payment Method</b>	NA

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<b>Report Period</b>	Aug, 2019 (HRS - LHMS 2019)	<b>Project Phase</b>	Implementing
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<b>Risk Level</b>	<i>On Track</i>
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<b>Monthly Update</b>	LHMS Activities, August 2019
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Management

- Reviewed charges, updated projections and cost report
- Finalized end date for non-response calling (Aug 31).
- Updated logging hours projections
- Updated monitoring spreadsheet
- Monitored SSL calling operations; recommended adjustments as necessary
- Prepared "lessons learned" and met to debrief with the HRS team
- Arranged for scanning 2017 qnaires

Systems Development/Programming

- Specified and programmed adjustments to Weblogging system, including making adjustments to facilitate reconciliation reports
- Modified progress reports for the Survey Services Lab work
- Modified Blaise SMS case delivery to make adjustments as needed during production

Main Data Collection

- 3rd SAQ (via priority mail) was shipped on August 12, 2019
- Conducted logging operations; responded to toll-free line calls and email inquiries.
- Searched HRS databases for address updates for returned mail; looked for updated phone numbers for non-response study cases with bad (or no) phone numbers. Remailled as necessary.
- As of Aug 30, 2019:
  - o Main Study: logged 1356 interviews, 1704 finalized sample lines; interim response rate 37%
  - o Non-Response: logged 178 interviews; 286 finalized sample lines; interim response rate 17%

Post-Collection Processing

- Packaged and shipped completed questionnaires on a weekly basis.
- Finalized Spanish scanning instructions.
- Delivered data to research team.

**Special Issues**

Project Concerns

The mail study response rates are running well behind those of the 2017 Fall data collection; this could be because the majority of the sample consists of baby boomer cohorts which have had lower response rates overall.

The non-response study is running well behind budgeted projections. While reminder calling is going very well; very few respondents are agreeing to be interviewed over the phone.

The project will incur a substantial underrun due to the truncated calling protocol (7 weeks) and substantially lower response rates (leading to far lower than budgeted interviewer hours used in the SSL). Non-response reminder/interview calling will end on August 31 to eliminate overlap with other HRS fall mail studies. The projected underrun is currently \$86,600.

<b>Cost</b>		
<b>Aug 31, 2019</b>	<b>Total Cost to Date (Direct + Indirect):</b>	386,408.24
	<b>Estimated Cost at Completion (E\$AC):</b>	604,513.53
	<b>Total Budget:</b>	691,201.00
	<b>Variance (Budget minus E\$AC):</b>	86,687.46

**Reason For Variance:**

The project will incur a substantial underrun due to the truncated calling protocol (7 weeks) and substantially lower response rates (leading to far lower than budgeted interviewer hours used in the SSL). Non-response reminder/interview calling will end on August 31 to eliminate overlap with other HRS fall mail studies. The projected underrun is currently \$86,600.

**Projections**  
**Aug 31, 2019**

**Dollars Projected For Month:** 72,038.56

**Actual Dollars Used:** 58,338.99

**Variance (Projected minus Actual):** 13,699.57

**Reason For Variance:** The variance is largely due to the lower number of SSL interviewer hours used, compared to what was projected. This is due to substantially lower response rates than budgeted in the SSL. Very few respondents are opting for a phone interview.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>	3708 mail; 1041 tel	60% mail; 50% tele	
<b>Goal at Completion:</b>			
<b>Current actual:</b>	1356 mail; 178 tel	37% mail; 17% tele	
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

**Other Measures**

<b>Project Name</b>	HRS Neuroimaging Pilot (HRS-Neuro)												
<b>Project Mode</b>	Primary: Telephone	Secondary: Face to Face	Total of Modes: 2										
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current										
<b>Budget</b>	<b>Direct Budget:</b> 169,363.00	<b>Indirect Budget:</b> 16,938.00	<b>Total Budget:</b> 186,301.00										
<b>Principal Investigator/Client</b>	Professor Kenneth Langa, MD, Ph.D (UM SRC-HRS) Professor Michael Weiner, MD (University of California, San Francisco) Professor David Weir, Ph.D (UM SRC-HRS)												
<b>Funding Agency</b>	Alzheimer's Association												
<b>IRB</b>	<b>HUM#:</b> HUM00142251	<b>Period Of Approval:</b>	04/2018-04/2019										
<b>Project Team</b>	<b>Project Lead:</b> Ian Ogden <b>Budget Analyst:</b> Richard Warren Krause <b>Production Manager:</b> Veronica Connors-Burge <b>Senior Project Advisor:</b> Evanthia Leissou <b>Production Manager:</b> <b>Production Manager:</b>												
<b>Proposal #:</b>	no data												
<b>Description:</b>	This pilot study will invite HRS-HCAP respondents to undergo medical imaging at one of three selected sites within the continental United States. SRO's role in the pilot is to call HRS/HCAP respondents to ask if they are willing to be contacted by an imaging site team in their region. Respondent contact information will be passed to the appropriate site coordinator for eligibility determination, scheduling of the tests, arrangement of transportation, and completion of the scans. SRO will process a token of appreciation for each respondent and monitor production across the three imaging sites.												
<b>SRO Project Period</b>	01/2018 - 09/2020												
<b>Data Col Period</b>	03/2019 - 09/2020												
<b>Security Plan</b>	NA												
<b>Milestone Dates</b>	<table border="1" style="width: 100%;"> <tr> <td><b>PreProduction Start:</b> 01/15/2018</td> <td><b>Pretest Start:</b></td> </tr> <tr> <td><b>Pretest End:</b></td> <td><b>Recruitment Start:</b></td> </tr> <tr> <td><b>Staffing Completed:</b></td> <td><b>GIT Start:</b></td> </tr> <tr> <td><b>SS Train Start:</b> 03/20/2019</td> <td><b>SS Train End:</b> 03/20/2019</td> </tr> <tr> <td><b>DC Start:</b> 03/25/2019</td> <td><b>DC End:</b> 10/31/2020</td> </tr> </table>			<b>PreProduction Start:</b> 01/15/2018	<b>Pretest Start:</b>	<b>Pretest End:</b>	<b>Recruitment Start:</b>	<b>Staffing Completed:</b>	<b>GIT Start:</b>	<b>SS Train Start:</b> 03/20/2019	<b>SS Train End:</b> 03/20/2019	<b>DC Start:</b> 03/25/2019	<b>DC End:</b> 10/31/2020
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<b>DC Start:</b> 03/25/2019	<b>DC End:</b> 10/31/2020												
<b>Other Project Team Members:</b>	[TSG] Technical Lead: Pamela Swanson [TSG] Programmer: Ashwin Dey [TSG] Data Manager: Madison Goforth [TSG] Blaise Programmer: Jim Hagerman [DCO] Production Manager: Veronica Connors-Burge [DCO] Field TL: 1 [DCO] Field Interviewers: (n=3, one of whom is bilingual)												
<b>Other Project Names:</b>	HRS Neuroimaging Study HCAP Neuroimaging Pilot HRS NPS												
<b>Sample Mgmt Sys</b>	Survey Trak; Project specific system (Web Logging for Site Sample Management)												
<b>Data Col Tool</b>	Blaise 4.8												
<b>Hardware</b>	Laptop; Other (Optional Laptop for External Site Teams)												
<b>DE Software</b>	Other (Web Logging for Site Data-Entry); N/A												
<b>QC Recording Tool</b>	NA												
<b>Incentive</b>	Yes, R; Yes, Other (Travel Expenses (processed and issued by imaging sites))												
<b>Administration</b>	SRO Group; Other (Imaging Site Teams (travel expenses only))												
<b>Payment Type</b>	Check, post (\$200.00)												
<b>Payment Method</b>	Check through STRak RPay System												
<b>Report Period</b>	Aug, 2019 (HRS-Neuro)	<b>Project Phase</b>	Implementing										
<b>Risk Level</b>	On Track												
<b>Monthly Update</b>	[Production Schedule] Due to monthly imaging capacity and unanticipated steps needed to activate imaging sites at Columbia and USC, data collection is expected to continue through August or September, 2020 at the earliest (barring a reduction in the goal of 105 completed imaging appointments). Informally, we have observed potential underwork of recruited cases												

[Data Collection Volume & Yield] Anticipated schedule above assumes that imaging sites will meet their stated monthly capacity in all months (excluding holiday months) going forward. Informally, we have observed potential underwork of recruited respondents and during the summer months, UM and USC falling short of their monthly capacity. During September, the SRO and SRC teams agreed to suspend a biweekly planning call in favor of dedicated check-in calls with each site team to discuss barriers, any additional protocol needs and hopefully, signal the importance of meeting monthly imaging goals.

[Data Collection - Site Activation] Both UM-MADC and USC sites active; following IRB approval for Columbia in mid-July, 2019, the start of NY-region data collection has been delayed by sign-off required by Columbia's PET Center. SRC/SRO teams and the study project manager at Columbia have maintained pressure / urgency, and NY-region recruitment is expected to begin in early-September.

[Budget] See Cost - "Reason For Variance" for summary of updated projections and funding decision from SRC team.

[Goal HPI] Goal HPI updated from 3.0 to 1.0 to reflect observed HPI thus far and HPI used in setting updated projections through Fall, 2020.

[Protocols + IRB (UM)] An amendment to the Coordinating Center application was submitted on 8/14/2019; scope: some administrative changes to the eResearch application and protocol documents. A subsequent amendment to put on file the recently issued Certificate of Confidentiality is planned once this amendment is approved.

[Certificate of Confidentiality] Issued by NIH on 8/21/2019 (expiring 2/28/2020).

[Study Protocol] (1) It has been confirmed that one of the three sites (UM-MADC) may independently consult a respondent's existing medical records as part of eligibility-determination; USC and Columbia do not consult medical records (unless requested through the respondent or their designate). A concern about this activity was shared with the SRC team. (2) SRC exploration of retaining a transportation provider (e.g. Lyft) continues; in the meantime, sites have been cleared to use any existing institutional arrangements to provide transportation to those who would prefer or are unable to drive themselves (UM - contracted vendors; USC - existing relationship with Lyft). (3) Slightly varying approaches to reporting results of clinical read of MRI observed; SRC team reviewed and signed off on the observed practices. (4) New production risk: Respondents requesting to carpool with each other to a site visit. Confirmed for sites that must never acknowledge another person's participation in this study, nor HRS at large, with a third-party and appointment-setting/transportation should be handled independently.

#### Special Issues

- (1) [New, 08/2018] Working with SRC to determine counts and rates of interest in advance of October, 2019 Data Monitoring Committee meeting.
- (2) [Ongoing] Managing complex workflow across multiple external sites with different operational considerations and internal protocols
- (3) [Ongoing] Completion of some data collection work prior to issuance of a Certificate of Confidentiality
- (4) [Ongoing] Ensuring effective monitoring in the absence of coordinating center staff with clinical expertise.

#### Cost Jul 31, 2019

<b>Total Cost to Date (Direct + Indirect):</b>	131,626.01
<b>Estimated Cost at Completion (E\$AC):</b>	222,791.95
<b>Total Budget:</b>	186,301.00
<b>Variance (Budget minus E\$AC):</b>	-36,490.95
<b>Reason For Variance:</b>	

SRO projections have been updated to reflect an expected extension of the data collection period (as of August, 2019 expected to continue through August-September, 2020). Key changes:

- (1) Extension of SRO activity through fall, 2020
- (2) Reduction in interviewer and TL hours projections to align with observed HPI thus far
- (3) Expected slight reduction in management hours to sustain data collection going forward

These updated projections were presented to the Neuroimaging investigator (Ken Langa) and the HRS budget team (Cathy L. and Aneesa B.), and were discussed at the 8/28/2019 HRS Executive Meeting. At the 8/28 executive meeting, the SRC team shared that they will reallocate some of their costs away from Neuroimaging, leaving the existing Neuroimaging budget available to cover the updated SRO projections.

Further discussion on timing of delivery of additional funds pending.

#### Projections Jul 31, 2019

<b>Dollars Projected For Month:</b>	14,343.01
<b>Actual Dollars Used:</b>	5,948.90
<b>Variance (Projected minus Actual):</b>	8,394.11



**Reason For Variance:**

Projections for July, 2019 did not yet reflect expected extension of data collection period. Projections from August, 2019 onward have been reduced significantly, settling at \$6-7,000 per month.

**Measures**

	<b>Units Complete</b>	<b>RR</b>	<b>HPI</b>
<b>Current Goal:</b>	105	65%	1.0
<b>Goal at Completion:</b>	[pending]	[pending]	[pending]
<b>Current actual:</b>	5	7.8%	1.07
<b>Estimate at Complete:</b>	[pending]	[pending]	[pending]
<b>Variance:</b>	[pending]	[pending]	[pending]

**Other Measures**

As of 8/26/2019:

[SRO Recruitment Rate - Goal] - 90.0%

[SRO Recruitment Rate - Current] - 75.9% (41 recruited / 54 finalized); 10 non-final

[Projected Completion / Scan Rate] 16.7% (5 completed / 30 finalized across recruitment & scanning phases).

<b>Project Name</b>	HRS Off Year Mail Survey 2019 (OYMS 2019)													
<b>Project Mode</b>	Primary: Mail      Total of Modes: 1													
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current										
<b>Budget</b>	<b>Direct Budget:</b>	557,510.00	<b>Indirect Budget:</b>	200,703.00 <b>Total Budget:</b> 758,213.00										
<b>Principal Investigator/Client</b>	David Weir (ISR/SRC) Helen Levy (ISR/SRC) Jacqui Smith (ISR/SRC)													
<b>Funding Agency</b>														
<b>IRB</b>	<b>HUM#:</b>	<b>Period Of Approval:</b>												
<b>Project Team</b>	<b>Project Lead:</b>	Daniah Buageila												
	<b>Budget Analyst:</b>	Grace Tison												
	<b>Production Manager:</b>													
	<b>Senior Project Advisor:</b>	Nicole G Kirgis												
	<b>Production Manager:</b>	Jennifer C Arrieta												
	<b>Production Manager:</b>													
<b>Proposal #:</b>	no data													
<b>Description:</b>	OYMS is part of the Health and Retirement (HRS). The goal of OYMS is to gather additional data on health and life history from participants in the HRS. In 2019, a paper questionnaire will be mailed to approximately 13,000 respondents of which 6,500 will be sent the health survey, and the other 6,500 the life history survey.													
<b>SRO Project Period</b>	06/2019 - 05/2020													
<b>Data Col Period</b>	10/2019 - 04/2020													
<b>Security Plan</b>	NA													
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"><b>PreProduction Start:</b></td> <td style="padding: 5px;"><b>Pretest Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>Pretest End:</b></td> <td style="padding: 5px;"><b>Recruitment Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>Staffing Completed:</b></td> <td style="padding: 5px;"><b>GIT Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>SS Train Start:</b></td> <td style="padding: 5px;"><b>SS Train End:</b></td> </tr> <tr> <td style="padding: 5px;"><b>DC Start:</b></td> <td style="padding: 5px;"><b>DC End:</b></td> </tr> </table>				<b>PreProduction Start:</b>	<b>Pretest Start:</b>	<b>Pretest End:</b>	<b>Recruitment Start:</b>	<b>Staffing Completed:</b>	<b>GIT Start:</b>	<b>SS Train Start:</b>	<b>SS Train End:</b>	<b>DC Start:</b>	<b>DC End:</b>
<b>PreProduction Start:</b>	<b>Pretest Start:</b>													
<b>Pretest End:</b>	<b>Recruitment Start:</b>													
<b>Staffing Completed:</b>	<b>GIT Start:</b>													
<b>SS Train Start:</b>	<b>SS Train End:</b>													
<b>DC Start:</b>	<b>DC End:</b>													
<b>Other Project Team Members:</b>	Programmer: Ashwin Dey Data Manager: TBD Project Assistant: Janet McBride, Debra Heier													
<b>Other Project Names:</b>	OYMS													
<b>Sample Mgmt Sys</b>	Other (Weblog)													
<b>Data Col Tool</b>	SAQ													
<b>Hardware</b>	Paper and Pencil													
<b>DE Software</b>	External vendor (DataForce)													
<b>QC Recording Tool</b>	N/A													
<b>Incentive</b>	Yes, R													
<b>Administration</b>	N/A													
<b>Payment Type</b>	Check, prepaid (\$25)													
<b>Payment Method</b>	Check through other system (Excel sheet to business office)													

<b>Report Period</b>	Aug, 2019 (OYMS 2019)	<b>Project Phase</b>	Planning
<b>Risk Level</b>	On Track		
<b>Monthly Update</b>	This month, the project team finalized and submitted materials to IRB on August 23rd. We met with the SSL to review project and logging, telephone follow up, and occ/ind coding needs. The project team also began reviewing sample and worked with DataForce to begin formatting of questionnaires.		
<b>Special Issues</b>			

**Cost**  
**Jul 31, 2019**

<i>Total Cost to Date (Direct + Indirect):</i>	3,588.60
<i>Estimated Cost at Completion (E\$AC):</i>	758,213.39
<i>Total Budget:</i>	758,213.00
<i>Variance (Budget minus E\$AC):</i>	-3,740.39
<i>Reason For Variance:</i>	SSL Rate Change

**Projections**  
**Jul 31, 2019**

<i>Dollars Projected For Month:</i>	4,691.52
<i>Actual Dollars Used:</i>	2,434.58
<i>Variance (Projected minus Actual):</i>	2,256.94
<i>Reason For Variance:</i>	Hours worked in July will hit in August for bi-weekly staff. Pushed projections forward.

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	India Human Development Survey Wave 3 (IHDS3)														
Project Mode	Primary: Face to Face		Secondary: Telephone	Total of Modes: 2											
Project Type	Sponsored Projects			Project Status	Current										
Budget	Direct Budget:	333,895.61	Indirect Budget:	198,006.92	Total Budget: 531,902.53										
Principal Investigator/Client	Sonalde Desai (University of Maryland) Stephanie Chardoul (University of Michigan ) Santanu Pramanik (National Council of Applied Economic Research) National Institutes of Health, Department of Health and Human Services														
Funding Agency	National Institutes of Health, Department of Health and Human Services														
IRB	HUM#:		Period Of Approval:												
Project Team	Project Lead:		Yu-chieh (Jay) Lin												
	Budget Analyst:		Carl S Remmert												
	Production Manager:														
	Senior Project Advisor:		Stephanie A Chardoul												
	Production Manager:														
	Production Manager:														
Proposal #:	no data														
Description:	The India Human Development Survey (IHDS) is a nationally representative, multi-topic, longitudinal survey of 41,554 households in 1503 villages and 971 urban neighborhoods across India. The first round of interviews were completed in 2004-5; data are publicly available through ICPSR. A second round of IHDS reinterviewed most of these households in 2011-12 (N=42,152). SRC joins IHDS Wave 3 to automate data collection, the scope of work includes methodological design, sample design, questionnaire design, technical instrument design, supervisor/interviewer training, production monitoring, quality control, data dissemination, and 2-3 weekly conference calls for capacity building.														
SRO Project Period	01/2019 - 05/2022														
Data Col Period	06/2020 - 05/2022														
Security Plan	NA														
Milestone Dates	<table><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:	Andrea P. (Help Desk), Ashwin D. (SurveyTrak Intl), Brad G. (Data Management), Christopher G. (Data Management), Colette K. (Blaise), Emmanuel E. (Help Desk), Gina C. (Tech Lead), Holly A. (WebTrak), Jay L. (Project Management), Jonathan H. (Data Management), LihShwu K. (DBA), Marsha S. (SurveyTrak Intl), Rama G. (Sync), Stephanie C. (SPA)														
Other Project Names:															
Sample Mgmt Sys	Other (SurveyTrak INTL)														
Data Col Tool	Blaise 5														
Hardware	Laptop; Other (NCAER Phone (In India))														
DE Software	Other (TBD)														
QC Recording Tool	DRI-CARI														
Incentive	Yes, Other (TBD)														
Administration	Other (TBD)														
Payment Type	Other (TBD)														
Payment Method	Other (TBD)														

<b>Report Period</b>	Aug, 2019 (IHDS3)	<b>Project Phase</b>	Planning
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<b>Risk Level</b>	On Track
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<b>Monthly Update</b>	1. Working on re-budget -- supplement funding from Gates, projections will be updated in late 2019; 2. Drafted projection changes for September with financial analyst -- replace data manager from Jonathan to Brad, re-allocate Zeina's hours; 3. Preparing instructions to Blaise 5 translation tool for client; 4. Taught clients how to create Blaise specs.; 5. Started introducing clients about STrak Intl specs and features for future study design considerations -- line spawning, share preloads, etc.; 6. Arranged/Implemented check-in calls/meetings n August/September
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**Special Issues**

Note: IHDS3 will not fill sections below because data collection is not parts of the scope of work.

**Cost**

Jul 31, 2019

***Total Cost to Date (Direct + Indirect):*** 531,902.53  
***Estimated Cost at Completion (E\$AC):*** 531,902.53  
***Total Budget:*** 531,902.53  
***Variance (Budget minus E\$AC):*** 0.00  
***Reason For Variance:*** Will have updates in early September due to current re-budgeting (see below monthly updates #2)

**Projections**

Jul 31, 2019

***Dollars Projected For Month:*** 531,902.53  
***Actual Dollars Used:*** 531,902.53  
***Variance (Projected minus Actual):*** 0.00  
***Reason For Variance:*** Will have updates in early September due to current re-budgeting (see below monthly updates #1)

**Measures**

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

**Other Measures**

<b>Project Name</b>	Monitoring the Future 2019 web (MTF Web 2019)				
<b>Project Mode</b>	Primary: Web      Total of Modes: 1				
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current		
<b>Budget</b>	<b>Direct Budget:</b> 413,377.00	<b>Indirect Budget:</b> 229,106.00	<b>Total Budget:</b> 642,483.00		
<b>Principal Investigator/Client</b>	John Schulenberg (UM-SRC)				
<b>Funding Agency</b>					
<b>IRB</b>	<b>HUM#:</b> HUM-0013R02	<b>Period Of Approval:</b>	In continuing review		
<b>Project Team</b>	<b>Project Lead:</b> Donnalee Ann Grey-Farquharson <b>Budget Analyst:</b> Christine Evanchek <b>Production Manager:</b> <b>Senior Project Advisor:</b> Gina-Qian Yang Cheung <b>Production Manager:</b> <b>Production Manager:</b>				
<b>Proposal #:</b>	no data				
<b>Description:</b>	<p>This project is a continuation of MTF Illume Web 2018. The new budget has been combined with previous to allow for "additional funding" of the continuing portion and includes some development/programming work for 2020.</p> <p>SRO will program and test six new survey versions, all will be programmed in Illume. After testing is complete, SRO will launch the 2019 Web survey data collection with an estimated sample size of 5,600 cases identified by the Principal Investigator who will deliver the contact information including e-mail address to SRO. The Web survey data collection will replace aspects of the standard mail-based data collection. Both the separately funded Winter Location calling effort and Non-Response follow-up calling will include this sample – with the calling effort being integrated with the standard MTF activities.</p> <p>This budget assumes an overall SRO involvement period of 12 months commencing in January 2019 with the data collection taking place during a 5-month period, beginning April of 2019. The total cost for this work is estimated at \$253,961 (\$162,796 direct, \$91,165 indirect), budgeted at the currently negotiated on-campus recovery rate of 56%.</p>				
<b>SRO Project Period</b>	01/2019 - 12/2019				
<b>Data Col Period</b>	04/2019 - 10/2019				
<b>Security Plan</b>	NA				
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> <b>PreProduction Start:</b>  <b>Pretest End:</b>  <b>Staffing Completed:</b>  <b>SS Train Start:</b>  <b>DC Start:</b> </td> <td style="padding: 5px;"> <b>Pretest Start:</b>  <b>Recruitment Start:</b>  <b>GIT Start:</b>  <b>SS Train End:</b>  <b>DC End:</b> </td> </tr> </table>			<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b>	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>
<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b>	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>				
<b>Other Project Team Members:</b>	Gina-Qian Yang Cheung, Donnalee Grey-Farquharson, Hueichun Oeng, Lloyd Hemingway, Shaowei Sun, Laura Yoder, Timothy Wright, Peter Sparks, Ashwin Dey				
<b>Other Project Names:</b>	MTF Illume Web 2019				
<b>Sample Mgmt Sys</b>	SMS; Web SMS; Illume				
<b>Data Col Tool</b>	NA				
<b>Hardware</b>	NA				
<b>DE Software</b>	NA				
<b>QC Recording Tool</b>	NA				
<b>Incentive</b>	Yes, Other (Managed by SRC Study Staff)				
<b>Administration</b>	NA				
<b>Payment Type</b>	N/A				
<b>Payment Method</b>	N/A				

<b>Report Period</b>	Aug, 2019 (MTF Web 2019)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	On Track		
<b>Monthly Update</b>	08/2019		

RR is 37.13%. The survey will go offline in October - final date to be determined. Programming and testing of the new forms is continuing. SRO is working with MTF staff to create new contact materials for the 2020 wave of data collection.

07/2019

RR is 35.37%. Programming of the new forms is underway. 2 of the 6 have been delivered to MTF staff for them to test. 3 more are now ready for SRO testing.

06/2019

RR is 32.38%. Scheduled reminders were sent out in June. programming has started on the new 2020 forms and 2 of the 6 are ready for SRO testing. a schedule has been worked out for delivery of these forms to the MTF team for testing (after SRO testing is complete).

04/2019

The survey went live on April 9th (on the same day MTF Staff mailed out pre-notification letters with QR codes) . Email invitations were scheduled to go out April 16th but were delayed because MTF staff had not obtained IRB approval on the new email invitation letters (signature change). Even so, there were 700 web survey complete cases on 4/25, so paper with QR does count as a contact method.

SRO is working with MTF staff to find an alternative if the delay in IRB approval is prolonged.

03/2019

Systems have been programmed and two rounds of testing in the testing server environment carried out. Prod test will occur the week of April 1st with data collection starting April 10th.

#### Special Issues

##### Cost

Jul 31, 2019

<b>Total Cost to Date (Direct + Indirect):</b>	454,465.56
<b>Estimated Cost at Completion (E\$AC):</b>	604,706.08
<b>Total Budget:</b>	642,483.00
<b>Variance (Budget minus E\$AC):</b>	37,776.92
<b>Reason For Variance:</b>	Variance arises from incomplete projections for programming to be done over the summer. Will be updated.

##### Projections

Jul 31, 2019

<b>Dollars Projected For Month:</b>	30,042.96
<b>Actual Dollars Used:</b>	27,527.66
<b>Variance (Projected minus Actual):</b>	2,515.30
<b>Reason For Variance:</b>	Programming of new forms was delayed and these hours will be projected for June 2019.

#### Measures

	Units Complete	RR	HPI
<b>Current Goal:</b> <b>Goal at Completion:</b> <b>Current actual:</b> <b>Estimate at Complete:</b> <b>Variance:</b>			

#### Other Measures

<b>Project Name</b>	National Data Innovation Centre -- Delhi Metropolitan Area Study (NDIC DMAS)				
<b>Project Mode</b>	Primary: Face to Face	Secondary: Telephone	Total of Modes: 2		
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current		
<b>Budget</b>	<b>Direct Budget:</b> 409,329.00	<b>Indirect Budget:</b> 40,932.00	<b>Total Budget:</b> 450,261.00		
<b>Principal Investigator/Client</b>	Sonalde Desai (University of Maryland) Stephanie Chardoul (University of Michigan ) Santanu Pramanik (National Council of Applied Economic Research)				
<b>Funding Agency</b>	Bill & Melinda Gates Foundation				
<b>IRB</b>	<b>HUM#:</b>	<b>Period Of Approval:</b>			
<b>Project Team</b>	<b>Project Lead:</b>	Yu-chieh (Jay) Lin			
	<b>Budget Analyst:</b>	Carl S Remmert			
	<b>Production Manager:</b>				
	<b>Senior Project Advisor:</b>	Stephanie A Chardoul			
	<b>Production Manager:</b>				
	<b>Production Manager:</b>				
<b>Proposal #:</b>	no data				
<b>Description:</b>	<p>The main objective of NCAER-NDIC is to serve as a laboratory for experiments in data collection, interfacing with partners in think tanks, Indian and international universities, and government. In particular, the Centre will address problems with existing data streams and important data currently not collected; foster, incubate, mainstream, and increase uptake of data innovations; and improve the triangulation and compatibility of distinct but related datasets. SRC joins NCAER-NDIC to launch Delhi Metropolitan Area Study, including baseline (N=5,255; HH-level, FtF), monthly (N=2,387, R-level; TEL), quarterly (N=2,700, HH-level, FtF), hospitalization follow-up (N=TBD, HH-level, FtF), and midline (N=5,255; HH-level, FtF) surveys (22 surveys in total) within ~20 months data collection period. SRC scope of work is to enhance NCAER-NDIC staff skills through formal and informal training and through the building of a broader collaborative network, including methodological design, sample design, questionnaire design, technical instrument design, supervisor/interviewer training, production monitoring, quality control, data dissemination, and 2-3 weekly conference calls for capacity building.</p>				
<b>SRO Project Period</b>	08/2018 - 10/2020				
<b>Data Col Period</b>	01/2019 - 09/2020				
<b>Security Plan</b>	NA				
<b>Milestone Dates</b>	<table border="1" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> <b>PreProduction Start:</b>  <b>Pretest End:</b>  <b>Staffing Completed:</b>  <b>SS Train Start:</b>  <b>DC Start:</b> </td> <td style="width: 50%; vertical-align: top;"> <b>Pretest Start:</b>  <b>Recruitment Start:</b>  <b>GIT Start:</b>  <b>SS Train End:</b>  <b>DC End:</b> </td> </tr> </table>			<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b>	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>
<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b>	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>				
<b>Other Project Team Members:</b>	Andrea P. (Help Desk), Ashwin D. (SurveyTrak Intl), Brad G. (Data Management), Christopher G. (Data Management), Colette K. (Blaise), Emmanuel E. (Help Desk), Gina C. (Tech Lead), Holly A. (WebTrak), Jay L. (Project Management), Jonathan H. (Data Management), LihShwu K. (DBA), Marsha S. (SurveyTrak Intl), Rama G. (Sync), Stephanie C. (SPA)				
<b>Other Project Names:</b>					
<b>Sample Mgmt Sys</b>	Other (SurveyTrak INTL)				
<b>Data Col Tool</b>	Blaise 5				
<b>Hardware</b>	Laptop; Other (NCAER Phone (In India))				
<b>DE Software</b>	N/A				
<b>QC Recording Tool</b>	N/A				
<b>Incentive</b>	Yes, Other (TBD)				
<b>Administration</b>	Other (National Council of Applied Economic Research)				
<b>Payment Type</b>	Other (TBD)				
<b>Payment Method</b>	Other (TBD)				

<b>Report Period</b>	Aug, 2019 (NDIC DMAS)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	On Track		
<b>Monthly Update</b>	1. Launched Monthly 06, HOSP 02, Quarterly 02 surveys w/ new preloads, setups for data merge/out, report, WTrak, Blaise/STrak revisions, help desk release setups; 2. Completed the last minute requests on Quarterly 02 preload		



designs and re launched the survey; 3. Completed remote/onsite Iwer training for new surveys and started using smart phone to capture photo and GPS; 4. Revised NDIC DMAS Suite -- time frame for all projects for coordinating IHDS3 with clients and tech team; 5. Requested and got budget allocations to support junior tech staff on conference attending (projections to be updated in September); 6. Started planning data management training onsite in New Delhi in 2020/01 set up preparation timeline; 7. Determined development timeline for NDIC DMAS phase 2 design (to be launched in 2020/02) and coordinated with client's resources; 8. Completed STrak specs for the Quarterly 04 design for reviews; 9. Worked with Stephanie C. on re-budget (faculty hours) and updated projection will be shown in September.

**Special Issues**

Note: NDIC DMAS will not fill sections below because data collection is not parts of the scope of work.

**Cost**

Jul 31, 2019

<b>Total Cost to Date (Direct + Indirect):</b>	219,469.76
<b>Estimated Cost at Completion (E\$AC):</b>	444,251.67
<b>Total Budget:</b>	450,261.00
<b>Variance (Budget minus E\$AC):</b>	6,009.33
<b>Reason For Variance:</b>	TSG team members work efficiently with PM and clients to keep the cost down!

**Projections**

Jul 31, 2019

<b>Dollars Projected For Month:</b>	8,552.26
<b>Actual Dollars Used:</b>	9,727.00
<b>Variance (Projected minus Actual):</b>	-1,174.74
<b>Reason For Variance:</b>	Additional efforts on client's additional design requests for the Quarterly 02 survey (launched on 8/23)

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>			
<b>Goal at Completion:</b>			
<b>Current actual:</b>			
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

**Other Measures**

<b>Project Name</b>	National Survey of Family Growth (NSFG 2010-2020)												
<b>Project Mode</b>	Primary: Face to Face	Total of Modes: 1											
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current										
<b>Budget</b>	<b>Direct Budget:</b> 32,653,126.47	<b>Indirect Budget:</b> 8,448,262.00	<b>Total Budget:</b> 41,101,388.47										
<b>Principal Investigator/Client</b>	Joyce Abma (NCHS) Mick Couper (ISR)												
<b>Funding Agency</b>	NCHS, CDC, NICHD												
<b>IRB</b>	<b>HUM#:</b> 0002716	<b>Period Of Approval:</b>	7/17/13 - 7/17/17										
<b>Project Team</b>	<b>Project Lead:</b> Heidi Marie Guyer <b>Budget Analyst:</b> Nancy E Oeffner <b>Production Manager:</b> Theresa Camelo <b>Senior Project Advisor:</b> Mary P Maher <b>Production Manager:</b> Maureen Joan O'Brien <b>Production Manager:</b> Rebecca Loomis												
<b>Proposal #:</b>	no data												
<b>Description:</b>	<p>The NSFG is a national survey of women and men 15-49 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>												
<b>SRO Project Period</b>	09/2010 - 07/2020												
<b>Data Col Period</b>	09/2011 - 06/2019												
<b>Security Plan</b>	Yes												
<b>Milestone Dates</b>	<table border="1" style="width: 100%;"> <tr> <td><b>PreProduction Start:</b> 03/01/2011</td> <td><b>Pretest Start:</b></td> </tr> <tr> <td><b>Pretest End:</b></td> <td><b>Recruitment Start:</b> 06/01/2011</td> </tr> <tr> <td><b>Staffing Completed:</b> 08/17/2011</td> <td><b>GIT Start:</b> 09/13/2011</td> </tr> <tr> <td><b>SS Train Start:</b> 09/15/2011</td> <td><b>SS Train End:</b> 09/19/2011</td> </tr> <tr> <td><b>DC Start:</b> 09/20/2011</td> <td><b>DC End:</b> 09/07/2019</td> </tr> </table>			<b>PreProduction Start:</b> 03/01/2011	<b>Pretest Start:</b>	<b>Pretest End:</b>	<b>Recruitment Start:</b> 06/01/2011	<b>Staffing Completed:</b> 08/17/2011	<b>GIT Start:</b> 09/13/2011	<b>SS Train Start:</b> 09/15/2011	<b>SS Train End:</b> 09/19/2011	<b>DC Start:</b> 09/20/2011	<b>DC End:</b> 09/07/2019
<b>PreProduction Start:</b> 03/01/2011	<b>Pretest Start:</b>												
<b>Pretest End:</b>	<b>Recruitment Start:</b> 06/01/2011												
<b>Staffing Completed:</b> 08/17/2011	<b>GIT Start:</b> 09/13/2011												
<b>SS Train Start:</b> 09/15/2011	<b>SS Train End:</b> 09/19/2011												
<b>DC Start:</b> 09/20/2011	<b>DC End:</b> 09/07/2019												
<b>Other Project Team Members:</b>	Chrissy Evanchek--Budget Analyst												
<b>Other Project Names:</b>													
<b>Sample Mgmt Sys</b>	SurveyTrak												
<b>Data Col Tool</b>	Blaise 4.8												
<b>Hardware</b>	Tablet; [UM cell] Phone; Paper and Pencil												
<b>DE Software</b>	NA												
<b>QC Recording Tool</b>	N/A												
<b>Incentive</b>	Yes, R; Yes, Other (babysitting fee)												
<b>Administration</b>	SRO Group												
<b>Payment Type</b>	Cash, prepaid (\$5; \$40); Cash, post (\$40; \$60)												
<b>Payment Method</b>	Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office												

<b>Report Period</b>	Aug, 2019 (NSFG 2010-2020)	<b>Project Phase</b>	Implementing
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<b>Risk Level</b>	On Track
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<b>Monthly Update</b>	<p>We are now in Week 11 of Q32, the last quarter of data collection for this NSFG contract. There are currently 1334 main interviews and 4079 screeners completed. We are above the average for this point in the quarter and since the age range expansion for both main and screeners due to a larger sample release to increase interview yield the last 2 quarters. We need to complete 244 main interviews during double sample this quarter to reach the goal of 5500 for the year (an additional 500 main iws for the final two Q's of this contract). The Screener completion rate is currently 96.4%. The goal for today is 92.0%, so we are ahead of goal. We are slightly behind when compared to the current cycle average (97.0%) and since the age range expansion (96.5%). The current HPI is 11.1. HPI is above average for this point in the quarter (9.9), as well as since the age range expansion (10.4). One lwer resigned this week.</p>
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She was an experienced NSFG lwer who left for a full time interviewing position at Nielsen where she will receive benefits. Her area will be covered by a traveler. The project management team, production management team, PI's, and NSFG team as a whole is working very closely on a daily basis to monitor and production and implement strategies available to us in order to meet the main interview goal. Extra double sample was released this quarter, the quarter is being extended, all available interviewers are out working, there is a bonus plan in place for reaching end of quarter goals with special emphasis on working a number of peak windows over Labor Day weekend, and the production manager is emailing a 'Daily Countdown' to all lwers and study staff in order to keep motivation up. Although we are not completely aware of NCHS' expectations for end of contract deliverables and will not be until after data collection comes to an end, the study team is working closely with CMT, ICPSR, the Archivist, the sampling unit, as well as individual team members to organize end of study closeout activities as well as planning for end of contract deliverables.

**Special Issues**

Additional funding was allocated to year 8 data collection by NCHS for the purpose of increasing yield by 20-30% in the last 2 quarters of the final year.

**Cost  
Aug 31, 2019**

**Total Cost to Date (Direct + Indirect):** 43,169,480.83  
**Estimated Cost at Completion (E\$AC):** 45,817,476.77  
**Total Budget:** 41,101,388.47  
**Variance (Budget minus E\$AC):** 201,040.23  
**Reason For Variance:** The total NSFG budget with all approved contract mods is actually \$46,018,517.00. Additional workscope, higher than anticipated HPI, higher yield, higher interviewer attrition, increased travel, increased hiring and training have all led to increased costs. NCHS is providing additional funding in the spring of 2019 to cover the projected overrun as well as to increase interview yield in the final two quarters of the contract. Additionally, new interviewers will be recruited and trained in order to carry out the additional interviewing and to account for increased attrition.

**Projections  
Aug 31, 2019**

**Dollars Projected For Month:** 547,491.46  
**Actual Dollars Used:** 547,778.72  
**Variance (Projected minus Actual):** -287.26  
**Reason For Variance:** Variance was due to salary/non-salary fringes and vacation expense. Some of the salary variance came from fringes and vacation expense for regular employees, not all of the ACA benefits came through for April, and Interviewer bonus was projected for April, but hit in March.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>	1550	68%	10.0
<b>Goal at Completion:</b>	5500	79%	10.0
<b>Current actual:</b>	1334	69.3%	11.1
<b>Estimate at Complete:</b>	4	61.8%	10.3
<b>Variance:</b>	28	18.2%	.3

**Other Measures**

The goals represent Q32 goals and actuals. We are currently in Week 5 of Quarter 32. Yield goals have increased as NCHS has released more funding to increase production in the final 2 Q's of C8. The HPI goal has changed to 10.0. The completion goals above are the annual goals. The current goal is for the current quarter.

<b>Project Name</b>	Qatar World Mental Health Survey (WMH-Qatar)			
<b>Project Mode</b>	Primary: Face to Face      Total of Modes: 1			
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current
<b>Budget</b>	<b>Direct Budget:</b>	62,440.00	<b>Indirect Budget:</b>	12,488.00 <b>Total Budget:</b> 74,928.00
<b>Principal Investigator/Client</b>	Zeina Mneimneh (University of Michigan) Salma Mawfek Khaled (Qatar University)			

<b>Funding Agency</b>	Cambridgeshire and Peterborough NHS Foundation Trust		
<b>IRB</b>	<b>HUM#:</b>	<b>Period Of Approval:</b>	
<b>Project Team</b>	<b>Project Lead:</b>	Yu-chieh (Jay) Lin	
	<b>Budget Analyst:</b>	Carl S Remmert	
	<b>Production Manager:</b>		
	<b>Senior Project Advisor:</b>	Gina-Qian Yang Cheung	
	<b>Production Manager:</b>		
	<b>Production Manager:</b>		

**Proposal #:** no data

**Description:** SRC joins Social & Economic Survey Research Institute at Qatar University for the upcoming World Mental Health Study in Qatar to conduct CIDI train-the-trainer training and build a quality assurance tool. The timing expectation is that SRC has an initial working version of the QC tool in time for a January 2020 data collection pilot, then refinements will be made for an October 2020 production launch. The Qatar team will be using the standard CIDI questionnaire instrument (Blaise 5), and they have Blaise programming expertise and their own sample management system. SRC had originally envisioned this as a version of our OLAP Cube, but have since moved away from that and toward a more "ODS"-type approach. SRC scope of work includes CIDI training, methodological designs for in-person and phone call verification, quality control indicators/interventions, and technical designs for quality assurance infrastructure and dashboard, etc.

**SRO Project Period** 04/2019 - 10/2021

**Data Col Period** 01/2020 - 10/2021

**Security Plan** NA

**Milestone Dates**

<b>PreProduction Start:</b>	<b>Pretest Start:</b>
<b>Pretest End:</b>	<b>Recruitment Start:</b>
<b>Staffing Completed:</b>	<b>GIT Start:</b>
<b>SS Train Start:</b>	<b>SS Train End:</b>
<b>DC Start:</b>	<b>DC End:</b>

**Other Project Team Members:** Cheng Z. (Application Programmer), Jay L. (PM), Gina-Qian C. (SPA), Sarah B. (System Analyst)

**Other Project Names:**

**Sample Mgmt Sys** Other (Blaise 5)

**Data Col Tool** Blaise 5

**Hardware** Laptop; Tablet

**DE Software** N/A

**QC Recording Tool** N/A

**Incentive** Yes, Other (TBD)

**Administration** Other (Qatar University)

**Payment Type** Other (TBD)

**Payment Method** Other (TBD)

**Report Period** Aug, 2019 (WMH-Qatar)      **Project Phase** Implementing

**Risk Level** On Track

**Monthly Update** 1. Completed the first deliverable documentation for invoices (every 6 months); 2. Identified CIDI 5.0 STEM questions to create specific QC indicator; 3. TSG team started programming QC indicators related to CIDI prevalence rates and STEM endorsements; 4. Updated cost reports with 2019/10 CIDI training projections; 5. Worked with Wen to apply HRS/PSID QC indicators (focus on keystrokes) formula to WMH-Qatar; 6. Drafted action plan and timeline for September/October efforts; 7. Contacted SESRI for Tech and overall management check-in meetings.

**Special Issues**

Note: WMH-Qatar will not fill sections below because data collection is not parts of the scope of work.

**Cost**

Jul 31, 2019

**Total Cost to Date (Direct + Indirect):** 9,933.97  
**Estimated Cost at Completion (E\$AC):** 83,432.93  
**Total Budget:** 74,928.00  
**Variance (Budget minus E\$AC):** -8,504.93  
**Reason For Variance:** (will not adjust the negative variance until early 2020) 1. added 2019/10 CIDI hours (50 hrs in total) to increase the negative variance; 2. with Stephanie C. and Zeina M.'s inputs, we will keep monitor TSG hours until the pilot launches in 2020/01, then adjust projections.

**Projections**

Jul 31, 2019

**Dollars Projected For Month:** 4,275.87  
**Actual Dollars Used:** 3,753.01  
**Variance (Projected minus Actual):** 522.86  
**Reason For Variance:** TSG staff focused on PQT launch in September and we delay certain tasks to later months.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>			
<b>Goal at Completion:</b>			
<b>Current actual:</b>			
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

**Other Measures**

<b>Project Name</b>	Stress and Wellbeing in Everyday Life (SWEL)												
<b>Project Mode</b>	Primary: Face to Face	Secondary: Observation	Total of Modes: 2										
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current										
<b>Budget</b>	<b>Direct Budget:</b> 490,424.00	<b>Indirect Budget:</b> 269,734.00	<b>Total Budget:</b> 760,158.00										
<b>Principal Investigator/Client</b>	Kira Birditt (UM ISR Life Course Development) Toni Antonucci (UM ISR Life Course Development)												
<b>Funding Agency</b>													
<b>IRB</b>	<b>HUM#:</b> TBD	<b>Period Of Approval:</b>	TBD										
<b>Project Team</b>	<b>Project Lead:</b> Piotr Dworak <b>Budget Analyst:</b> Janelle P Cramer <b>Production Manager:</b> Derek Dubuque <b>Senior Project Advisor:</b> Kirsten Haakan Alcser <b>Production Manager:</b> <b>Production Manager:</b>												
<b>Proposal #:</b>	no data												
<b>Description:</b>	<p>SWEL is a study to assess the role of cardiovascular stress in daily lives among matched test and control groups of ethnic minority and white respondents. Data collected via an interviewer-administered 30-min instrument, followed by a 4-day measurement of cardiovascular activity using a wearable biometric device, and 6-per-day self-administered momentary assessments.</p> <p>Data collection goal: 300 CAPI interviews (79% RR on sample of ~380), revised to test/control setup in which 150 interviews are needed from 173 test subjects (87% RR) and 150 interviews from the 307 control subjects (48% RR).</p> <p>Sample: Participants in Wave 3 of Social Relations (2014) from the Detroit tri-county area.</p> <p>Data collection period: estimated for 13 weeks but both the staffing levels and the proposed data collection pace is being discussed with the client given the availability of the wereable devices.</p>												
<b>SRO Project Period</b>	12/2016 - 10/2017												
<b>Data Col Period</b>	06/2017 - 09/2016												
<b>Security Plan</b>	NA												
<b>Milestone Dates</b>	<table border="1" style="width: 100%;"> <tr> <td><b>PreProduction Start:</b> 03/01/2017</td> <td><b>Pretest Start:</b> 01/22/2018</td> </tr> <tr> <td><b>Pretest End:</b> 02/02/2018</td> <td><b>Recruitment Start:</b> 11/01/2017</td> </tr> <tr> <td><b>Staffing Completed:</b> 01/02/2018</td> <td><b>GIT Start:</b> 03/07/2018</td> </tr> <tr> <td><b>SS Train Start:</b> 03/07/2018</td> <td><b>SS Train End:</b> 03/11/2018</td> </tr> <tr> <td><b>DC Start:</b> 04/04/2018</td> <td><b>DC End:</b> 10/31/2019</td> </tr> </table>			<b>PreProduction Start:</b> 03/01/2017	<b>Pretest Start:</b> 01/22/2018	<b>Pretest End:</b> 02/02/2018	<b>Recruitment Start:</b> 11/01/2017	<b>Staffing Completed:</b> 01/02/2018	<b>GIT Start:</b> 03/07/2018	<b>SS Train Start:</b> 03/07/2018	<b>SS Train End:</b> 03/11/2018	<b>DC Start:</b> 04/04/2018	<b>DC End:</b> 10/31/2019
<b>PreProduction Start:</b> 03/01/2017	<b>Pretest Start:</b> 01/22/2018												
<b>Pretest End:</b> 02/02/2018	<b>Recruitment Start:</b> 11/01/2017												
<b>Staffing Completed:</b> 01/02/2018	<b>GIT Start:</b> 03/07/2018												
<b>SS Train Start:</b> 03/07/2018	<b>SS Train End:</b> 03/11/2018												
<b>DC Start:</b> 04/04/2018	<b>DC End:</b> 10/31/2019												
<b>Other Project Team Members:</b>													
<b>Other Project Names:</b>	Racial Disparities in Health: The Roles of Stress, Social Relations, and the Cardiovascular System												
<b>Sample Mgmt Sys</b>	MSMS												
<b>Data Col Tool</b>	Blaise 4.8; Blaise 5												
<b>Hardware</b>	Laptop												
<b>DE Software</b>	NA												
<b>QC Recording Tool</b>	Camtasia												
<b>Incentive</b>	Yes, R												
<b>Administration</b>	SRO Group												
<b>Payment Type</b>	Cash, prepaid (2); Cash, post (30); Other (Cash post biomarker)												
<b>Payment Method</b>	Check through other system (MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (MSMS)												

<b>Report Period</b>	Aug, 2019 (SWEL)	<b>Project Phase</b>	Initiation
<b>Risk Level</b>	Some Concerns		
<b>Monthly Update</b>	Project updates:		

SWEL completed 193 baselines and interviews continue to trickle at a pace of 3 - 4 per week thanks to different initiatives fostering data collection. SWEL has released additional n=72 sample of core network members of SocRel Wave 3 respondents. We continue pursuing additional initiatives including follow up on letters with prepayment checks to Rs who either expressed a concern or have been hard to reach and will be attempted in-person with gift/swag bags.

We have also began SWEL by Phone and shipped out 2 kits as a pilot of administering SWEL protocol remotely. We have another 60 respondents in the remote/out-of-area sample who are released to the interviewers.

Data collection / Sample:

Stats: 193 completes of 325 required. Estimate for viable sample is ~ 295 (after release of CNMs), however, many have expressed concern/refusal and/or have 20+ attempts. Interviewers report around 25 - 30% of the sample they hold is viable.

Staffing:

SWEL has 4 interviewers making FTF visits + 1 interviewer making calls and scheduling appointments. We utilize 2 TLs, 1 of whom worked on DEWS to help with coordinating R setup and other tasks. Locator is also engaged in trying to find new contacts.

Technical system:

SWEL continues to experience issues with MSMS not saving Baseline interview in Blaise 4.8.

Finances: Re-projections are needed to extend project performance time beyond September and account for change in workscope (adding new sample and phone interviews).

#### Special Issues

Cost  
Sep 30, 2019

<b>Total Cost to Date (Direct + Indirect):</b>	924,174.01
<b>Estimated Cost at Completion (E\$AC):</b>	1,201,045.70
<b>Total Budget:</b>	760,158.00
<b>Variance (Budget minus E\$AC):</b>	-440,887.70
<b>Reason For Variance:</b>	SWEL is approved for \$1,206,680 in total cost resulting in \$446,399 overrun (direct + indirect). Target direct cost is \$774,868 and SWEL is projected on pace through September.

Projections  
Sep 30, 2019

<b>Dollars Projected For Month:</b>	38,313.67
<b>Actual Dollars Used:</b>	37,558.12
<b>Variance (Projected minus Actual):</b>	755.55
<b>Reason For Variance:</b>	

#### Measures

	Units Complete	RR	HPI
<b>Current Goal:</b>	NA		
<b>Goal at Completion:</b>	325		
<b>Current actual:</b>	177		
<b>Estimate at Complete:</b>	325		
<b>Variance:</b>			

#### Other Measures

<b>Project Name</b>	Surveys of Consumer Attitudes (SCA 2019)				
<b>Project Mode</b>	Primary: Telephone	Total of Modes: 1			
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current		
<b>Budget</b>	<b>Direct Budget:</b> 0.00	<b>Indirect Budget:</b> 0.00	<b>Total Budget:</b> 0.00		
<b>Principal Investigator/Client</b>	Richard Curtin (SCA) Tuba Suzer-Gurtekin (SCA)				
<b>Funding Agency</b>					
<b>IRB</b>	<b>HUM#:</b>	<b>Period Of Approval:</b>			
<b>Project Team</b>	<b>Project Lead:</b>	Theresa Camelo			
	<b>Budget Analyst:</b>	Dean E Stevens			
	<b>Production Manager:</b>				
	<b>Senior Project Advisor:</b>	Heidi Marie Guyer			
	<b>Production Manager:</b>				
	<b>Production Manager:</b>				
<b>Proposal #:</b>	no data				
<b>Description:</b>	<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 600 interviews.</p>				
<b>SRO Project Period</b>	12/2018 - 12/2019				
<b>Data Col Period</b>	01/2019 - 12/2019				
<b>Security Plan</b>	NA				
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> <b>PreProduction Start:</b>  <b>Pretest End:</b>  <b>Staffing Completed:</b>  <b>SS Train Start:</b>  <b>DC Start:</b> 08/27/2019 </td> <td style="padding: 5px;"> <b>Pretest Start:</b>  <b>Recruitment Start:</b>  <b>GIT Start:</b>  <b>SS Train End:</b>  <b>DC End:</b> 09/23/2019 </td> </tr> </table>			<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b> 08/27/2019	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b> 09/23/2019
<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b> 08/27/2019	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b> 09/23/2019				
<b>Other Project Team Members:</b>	SSAs: Steven Sonoras, Nancy Walker, Ann Munster Programmer: Dave Dybicki, Max Malhotra TSG: Pamela Swanson, Tim Wright				
<b>Other Project Names:</b>					
<b>Sample Mgmt Sys</b>	SMS				
<b>Data Col Tool</b>	Blaise 4.8				
<b>Hardware</b>	Desktop				
<b>DE Software</b>	NA				
<b>QC Recording Tool</b>	DRI-CXM; Live monitoring				
<b>Incentive</b>	Not used				
<b>Administration</b>	NA				
<b>Payment Type</b>	N/A				
<b>Payment Method</b>	N/A				
<hr/>					
<b>Report Period</b>	Aug, 2019 (SCA 2019)	<b>Project Phase</b>	Initiation		
<b>Risk Level</b>	On Track				
<b>Monthly Update</b>	August SCA interviewing began as scheduled on July 31, 2019 and was completed on schedule on Monday, August 26th. Our telephone data collection staff completed 601 cases (1 beyond goal); 401 RDD and 200 RECON. The overall HPI for August was 3.69.				
<b>Special Issues</b>					



**Cost**  
**Sep 10, 2019**

<i>Total Cost to Date (Direct + Indirect):</i>	96,298.72
<i>Estimated Cost at Completion (E\$AC):</i>	96,298.72
<i>Total Budget:</i>	0.00
<i>Variance (Budget minus E\$AC):</i>	0.00
<i>Reason For Variance:</i>	

**Projections**  
**Sep 10, 2019**

<i>Dollars Projected For Month:</i>	0.00
<i>Actual Dollars Used:</i>	0.00
<i>Variance (Projected minus Actual):</i>	0.00
<i>Reason For Variance:</i>	

Measures		Units Complete	RR	HPI
<i>Current Goal:</i>	600			3.76
<i>Goal at Completion:</i>	600			3.69
<i>Current actual:</i>	601			3.69
<i>Estimate at Complete:</i>				
<i>Variance:</i>				

**Other Measures**

<b>Project Name</b>	Video Communication Technologies in Survey Data Collection (VCT)					
<b>Project Mode</b>	Primary: Mixed      Total of Modes: 3					
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current		
<b>Budget</b>	<b>Direct Budget:</b>	241,958.00	<b>Indirect Budget:</b>	135,497.00 <b>Total Budget:</b> 377,455.00		
<b>Principal Investigator/Client</b>	Dr. Frederick G. Conrad (University of Michigan) Dr. Michael F. Schober (The New School)					
<b>Funding Agency</b>	National Science Foundation					
<b>IRB</b>	<b>HUM#:</b>	HUM00159711	<b>Period Of Approval:</b>	Exempt		
<b>Project Team</b>	<b>Project Lead:</b>	Andrew L Hupp				
	<b>Budget Analyst:</b>	Dean E Stevens				
	<b>Production Manager:</b>	Pooja Varma-Laughlin				
	<b>Senior Project Advisor:</b>	Nicole G Kirgis				
	<b>Production Manager:</b>					
	<b>Production Manager:</b>					
<b>Proposal #:</b>	no data					
<b>Description:</b>	<p>This research project will examine data quality, participation, respondent experience, and costs in two promising but not yet widely deployed survey modes that use off-the-shelf video technology and are less costly than face to face (FTF) interviews: video-mediated (VM) interviews (live two-way communication via platforms like Skype) and video self-administered (VS) interviews, in which video-recorded interviewers ask the questions and respondents answer by typing or clicking. This project will compare these measures of data quality and costs in VM and VS interviews carried out by the same professional interviewers and in conventional online (textual) self-administered questionnaires, asking the same survey questions to members of a representative sample who are randomly assigned to one of these three modes. Because VM is synchronous and "live" like face-to-face (FTF) interviewing, and VS is asynchronous and recorded but still projects a human face, the project's comparisons will provide new insights regarding how these decomposable aspects of human contact affect behavior and experience in surveys. The project's results will reveal the extent to which, and for whom, less costly interaction (live but remote vs. recorded) with an interviewer promotes engagement and data quality comparable to what is found in similar FTF interviews. More generally, the findings will address when and in what ways modern communication modes that reduce social presence and are less personal might be equal to or even more effective than FTF interaction. Findings from this project will provide valuable information relevant to the future of survey measurement and will be of interest to survey researchers in the Federal statistical system and other survey organizations.</p> <p>Even as survey data continue to be central to public policy and decision-making, survey measurement is challenged by declining response rates, increasing costs, declining trust in survey organizations, and rapidly changing communication habits among the public. Understanding how video technologies could fit into the future of survey data collection is important both because it may meet potential respondents "where they live" and because it may provide a significantly lower cost alternative to FTF interviewing. There is even the potential to reach some members of the public whose location makes FTF interviewing difficult or expensive, but who may well be able to participate in a video interview (e.g., people who live in remote rural areas or members of the military deployed overseas). In comparing data quality across these three survey modes, the project will quantify participation rates, connectivity problems, respondent compliance with the video interviewing protocol, conscientious responding (giving precise answers to numerical questions, thoughtfully differentiating answers), and disclosure of sensitive information. The project will measure the potential impact of individual interviewers, feelings of engagement with the interview, rapport with the interviewer, and respondent satisfaction. The project also will allow assessment of data collection costs across these modes. Access to and use of video technologies are not universal, and even among those with access some are willing to engage in video interaction while others are reluctant. The project will begin to address whether and how the effects of video technologies on survey data collection differ for participants with different levels of prior experience and preference for using the technologies.</p>					
<b>SRO Project Period</b>	09/2018 - 06/2020					
<b>Data Col Period</b>	08/2019 - 11/2019					
<b>Security Plan</b>	NA					
<b>Milestone Dates</b>	<table border="1" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> <b>PreProduction Start:</b>  <b>Pretest End:</b>  <b>Staffing Completed:</b>  <b>SS Train Start:</b>  <b>DC Start:</b> 10/29/2019 </td> <td style="width: 50%; vertical-align: top;"> <b>Pretest Start:</b>  <b>Recruitment Start:</b>  <b>GIT Start:</b>  <b>SS Train End:</b>  <b>DC End:</b> </td> </tr> </table>				<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b> 10/29/2019	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>
<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b> 10/29/2019	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>					

<b>Other Project</b>	Kallan Larsen - PSM MS Student
<b>Team Members:</b>	Ai Rene Ong - PSM PhD Student Tianheao Wang - PSM MS Student Kevin Jensen (TSG) - portal/Blaise programming Shanti Suresh, Matt Hanger, & Laura Yoder (TSG) - data management Kyle Goodman - MSMS set-up programming Jim Rodgers - MSMS consultation Brady West - Research Associate Professor, Survey Research Center Video Communication Technologies
<b>Other Project Names:</b>	
<b>Sample Mgmt Sys</b>	MSMS
<b>Data Col Tool</b>	Blaise 5
<b>Hardware</b>	Desktop; Other (Webcam, USB headset)
<b>DE Software</b>	N/A
<b>QC Recording Tool</b>	N/A
<b>Incentive</b>	Yes, R
<b>Administration</b>	SRO Group; Other (CloudResearch (TurkPrime))
<b>Payment Type</b>	Cash, prepaid (\$2); Other (ABS=\$2 giftcode -> prepaid; \$20/\$22 giftcode -> post)
<b>Payment Method</b>	Imprest Cash Fund from ISR Business Office; Other (TurkPrime (now CloudResearch))

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<b>Report Period</b>	Aug, 2019 (VCT)	<b>Project Phase</b>	Implementing
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<b>Risk Level</b>	<i>Some Concerns</i>
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<b>Monthly Update</b>	Both teams continue to meet regularly.
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Data collection began in August (project released 7/31). The invitation letters were mailed on 8/1. The second (postcard) reminder was mailed on 8/12. The third (final) reminder was mailed on 8/22. Production has been (s)lower than expected. To-date there is 1 VM complete (n=600), 5 VS completes (n=150) and 12 TS completes (n=150). The TS response rate is near what was forecast. The VM and VS lags behind. VS is curious because they received the same letter as the TS cases, the only difference being the videos in the interview (which they don't find out about until in the interview). We have looked at breakoffs and there is only one, so the videos are not the cause. VM has a similar issue. Those invitees do now it's more work and that could be a deterrent.

To date there have been 8 screeners started, with 6 being completed (1 complete IW, 1 broken appointment, 1 appointment, 2-didn't schedule an appointment, 1 failed connection test) and 2 breakoffs. We've looked at portal data also, and don't see much activity there. Most cases who try and login ultimately complete, there is an issue of getting people to log in at all.

To date there have been 22 letters returned from the post office (14-vacant, 4 no mail receptacle, 1-no such number, 1-not deliverable as addressed, 2-attempted-not known). This is higher than anticipated.

The VCT team provided demos of the system to SRO Admin and TSG in August.

An amendment was submitted to the IRB for the MiCDA funding. The IRB determined there was no review required for our amendment. That determination was forwarded on to MiCDA. We are currently awaiting for the funds and accounts to be set-up.

UM-IT provided the Blue Jeans links for the study. We are also waiting for some additional information (data dictionary and expected (or normal) values for the Blue Jeans data. We have prompted UM-IT several times about this. Andrew prepared a file with the meeting links to Data Ops.

Andrew purchased additional giftcodes (\$20, \$22). The first payments issued have been submitted to the ISR business office for reconciliation.

Data management continues to take longer than expected.

Andrew met with Dean to update the projections as necessary. There were several items projected that did not hit in July. They have been projected in August. The projected overrun increased ~\$2,000 from last month's report.

Andrew met with the PIs to discuss alternative designs possibilities moving forward. The team is settling on using a panel provider (TurkPrime). Andrew, Fred, and Michael met with them 8/26. They are awaiting a cost estimate. Andrew will rebudget when he returns from vacation. The plan is to use the panel for the interviews we need, while still doing a smaller ABS probability design concurrent. The outstanding question is how big can the ABS replicate be. Andrew (and Kallan) will revisit in September when both are back in the office.

Two MAPOR abstracts were excepted. Both are being led by students (Kallan and Ai Rene). The rest of the team will be co-authors. Both presentations will have faculty (Fred) as a co-presenter.

### Special Issues

**Cost**  
**Aug 31, 2019**

<b>Total Cost to Date (Direct + Indirect):</b>	185,790.08
<b>Estimated Cost at Completion (E\$AC):</b>	400,926.98
<b>Total Budget:</b>	377,455.00
<b>Variance (Budget minus E\$AC):</b>	-23,471.98
<b>Reason For Variance:</b>	Postage was under budgeted by ~10,000 (assuming everyone is sent all three mailings). At least 50% of the interviewers make the TL (Survey Tech II) rate and the projections were at the Survey Tech I rate. 50% of the hours were moved to Survey Tech II. 3-5% of interviewer hours were added for shift management in the SSL.

**Projections**  
**Aug 31, 2019**

<b>Dollars Projected For Month:</b>	48,861.55
<b>Actual Dollars Used:</b>	0.00
<b>Variance (Projected minus Actual):</b>	0.00
<b>Reason For Variance:</b>	

### Measures

	Units Complete	RR	HPI
<b>Current Goal:</b>	375	10%	
<b>Goal at Completion:</b>	375		
<b>Current actual:</b>	18	3.1%	
<b>Estimate at Complete:</b>	375		
<b>Variance:</b>			

### Other Measures