

# ***Survey Research Operations***

## ***Monthly Project Report***

### ***Sponsored Projects***

***July 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*  
 (HID) *High Intensity Drinking*  
 (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*  
 (CDS-19) *PSID Child Development Supplement V (2019)*  
 (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**  
**Data Col Period**  
**Security Plan**  
**Milestone Dates**

01/2019 - 10/2021  
 09/2019 - 03/2021  
 NA

**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**

July, 2019 (AFHS)

**Project Phase**

Planning

**Risk Level**

*Some Concerns*

**Monthly Update**

- PI group are focused continues to be on reviewing NSFG CRQs to determine content for the main questionnaire.
- Blaise programming of the main questionnaire is going well, we now have specs. for almost three quarters of the sections.
- We have introduced an expt. to the screener contact protocol around receipt of a bilingual or English only initial contact letter.
- In the last stages of awarding a contract to Dataforce who will provide printing, mailing and scanning services. A sole source justification has been completed.
- SRO focus for the coming month will be; developing the web survey portal, contact materials are with the translators, begin working with the vendor on formatting the web screener and continue to write the MSMS task rules and the IRB submission.
- Rescheduling the start date - we will not begin production on 3 September. Work that needs to happen before we can launch - all sections of main questionnaire need to be finalised (currently four outstanding), programmed and translated. Translated questionnaires and respondent materials need to be included in the IRB submission.

**Special Issues**

\*Additional funding (AFHS Supplement) for web screener development provided by SRC - Actuals (6/30) \$8,888.29, Projected (6/30) (total \$18,323.50 projected, budget amount \$18,609.00, variance \$285.50 )

**Cost**

**Jun 30, 2019**

**Total Cost to Date (Direct + Indirect):** 35,878.09

**Estimated Cost at Completion (E\$AC):** 2,293,150.42

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

**Variance (Budget minus E\$AC):** 196,982.60

**Reason For Variance:**

Ballpark cost used for printing, mailing and scanning has been included in the projections. We now have a formal quote from Dataforce and working on the final agreement. I will work on incorporating the actual quote amount into the projections - this should reduce the variance. Although Procurement agreed to just seeking a quote from Dataforce, due to the amount we will have to complete a sole source justification document. Scope changes have been extensive so far and will continue - so far these changes have not increased costs (some have decreased costs).

**Projections**

**Jun 30, 2019**

**Dollars Projected For Month:** 21,944.89

**Actual Dollars Used:** 7,827.90

**Variance (Projected minus Actual):** 14,071.99

**Reason For Variance:**

Fewer programmer hours used (needed) in May - we now have specs. for sections of the main questionnaire and the go ahead to begin programming (rather than waiting for specs. for all sections to be ready before doing so).

**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**

July, 2019 (ACL6)

**Project Phase**

Implementing

**Risk Level**

*Some Concerns*

**Monthly Update**

On 8/1/19, Maggie shared with SRO her disappointment with the current response rate for ACL6 (41%) compared to RR target (80%) target included in proposal assumptions (e.g. based on past wave performance). We will compare the RR across all waves for further analysis. SRO (SSL Interviewers) will continue to increase call attempts across modes and maintain Interviewer hours to meet our current production target goal. In the next few weeks, a non-monetary incentive (i.e. folding tote bag) with a postcard will be mailed to all non-final cases. We will also prepare a plan for triggering an end game incentive.

In addition, Maggie is now considering moving data collection to the field for limited face-to-face work at the end of the study (mid-September). We are working on a plan that may be operationalized, and will consult with others here at SRO before sharing with Maggie. We've stated that there will be budget and other implications, as Maggie is aware. (In October 2018 Maggie asked SRO to put together a field-only proposal budget, which she decided not to go with; however, SRO made system design decisions that will still support possible limited face-to-face work at the end of the study).

**Special Issues**

**Cost**  
Jul 24, 2019

**Total Cost to Date (Direct + Indirect):** 505,759.56  
**Estimated Cost at Completion (E\$AC):** 766,527.41  
**Total Budget:** 722,153.00  
**Variance (Budget minus E\$AC):** -44,374.41  
**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

**Projections**  
Jul 24, 2019

**Dollars Projected For Month:** 135,901.52  
**Actual Dollars Used:** 92,535.29  
**Variance (Projected minus Actual):** 43,366.23  
**Reason For Variance:**

Our projections for lower staff hours are higher than actuals.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>	1,220 (1,526 sample)	80%	5
<b>Goal at Completion:</b>			
<b>Current actual:</b>	560	41%	5.97
<b>Estimate at Complete:</b>			
<b>Variance:</b>			



**Other Measures**

Home Visit Consent

Goal at Completion: 700

Current Actual: 334

<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>	July, 2019 (A-STARRS LS)	<b>Project Phase</b>	Implementing										
<b>Risk Level</b>	On Track												
<b>Monthly Update</b>	<input type="checkbox"/> We have collected 12,133 Wave 2 main study interviews and 199 end game interviews as of June 27. <input type="checkbox"/> The sub-award agreement for the Year 5 extension (supplemental funding) was flagged for a more in-depth assessment of acceptable risk to the University of our Enclave. We provided STARRS security information to the IT reviewer. The security review passed on July 17.												

- Meredith met with representatives from the ODUSA and USUHS on July 22 to discuss the operational challenges in mailing to the NIOSH addresses, and to understand what the ODUSA/GSC would like to accomplish in doing so.
- We provided feedback and documentation for the response to the GSC's Wave 3 approval memo.
- We continued work toward geocoding the addresses for the full STARRS-LS sample, to append census block so that the research team will be able to link the STARRS-LS sample to census-type data.
- We submitted the amendment to the U-M IRB for the HIPAA "Waiver and Altered Authorization Application" on July 4.
- We delivered PPDS survey public use materials to ICPSR on July 3. As of July 23, we expect to deliver STARRS-LS Wave 1 public use pieces to ICPSR around July 24.
- We made progress on biomarker group requests for assistance. Data transfers were completed for four requests.
- We awaited the transfer of construct files from AAG via the data locker.
- We continued work on a process for extending data transfer memo dates for 'data destruction' to a later date.

## Special Issues

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

- ICPSR's start on STARRS-LS Wave 1 survey data curation was delayed by about three weeks due to two issues: 1) the delay in getting the seven-month extension proposal (supplemental funding) in place, and 2) the late addition of two new weights datasets, including two new design variables, and updated documentation from Harvard.
  - o As of July 23, the funding delay should no longer be a risk to the W1 public use release timeline. Now that the security review has passed, we expect to be able to provide accounts to ICPSR in August.
  - o In addition, we received the late additions from Harvard and have these prepared and ready to send to ICPSR ~July 24.
  - o A delay of three weeks still keeps us within the promised delivery window of "fall 2019."
- 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

Jun 30, 2019

<b>Total Cost to Date (Direct + Indirect):</b>	11,961,762.09
<b>Estimated Cost at Completion (E\$AC):</b>	12,772,184.13
<b>Total Budget:</b>	12,834,699.00
<b>Variance (Budget minus E\$AC):</b>	62,514.87
<b>Reason For Variance:</b>	

We are currently projecting an overall project surplus of \$62,515, a decrease of \$10,943 from last month's report. In general, our surplus results from continued efficiencies and refinements in projections. The decrease in the surplus this month was due to our adding in projections for programming staff to work on transitioning the instrument to the latest version of Blaise 5 data collection software. The hours were added in Oct, Nov and Dec 2019. Any work carried out after November 2019 will be part of a no cost extension.

## Projections

Jun 30, 2019

<b>Dollars Projected For Month:</b>	204,312.74
<b>Actual Dollars Used:</b>	196,509.05
<b>Variance (Projected minus Actual):</b>	7,803.69
<b>Reason For Variance:</b>	

Salary and indirect cost expenses were slightly lower than projected.

## 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>	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**

MSMS

**Data Col Tool**

Blaise 5

**Hardware**

Laptop; [UM cell] Phone

**DE Software**

N/A

**QC Recording Tool**

Other (to be specified)

**Incentive**

Yes, R

**Administration**

SRO Group

**Payment Type**

Cash, prepaid (50)

**Payment Method**

Check through other system (MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (MSMS)

**Report Period**

July, 2019 (BFY)

**Project Phase**

Implementing

**Risk Level**

On Track

**Monthly Update**

Project updates:

Age 1 interviewing has kicked off following training in AA in June 24th, and EEG training on-site at iwer locations completed by July 13th. All interviewers have been certified ready to begin. We had one attrition after the training bringing total staff to 14 interviewers. We completed 1, 5, and 7 interviews in 3 weeks since releasing the sample and the pace is accelerating. Interviewers report longer than expected visit times (expected ~ 90 minutes vs. observed maximums of 150 minutes) we continue to monitor interview length as interviewers get more skilled in conducting the protocol involving 4 additional components.

Data collection / Sample:

Overall Age 1 Goals (week 5 of 50):

	Recruited	Age 1 goal	Re-interviewed
Overall	1000	900 14	+/-
Nebraska	295	266 5	-290
New York	286	257 5	-281
Minnesota	124	112 1	-123
Louisiana	295	266 3	-292

Staffing:

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:

So far systems are operating as expected.

Finances:

Budget overrun has been reduced in June after re-adjusting travel expectations. Overall, the overrun is a result of Recruitment onboarding expenses (discussed with PIs), 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  
 Aug 31, 2019

**Total Cost to Date (Direct + Indirect):** 1,918,096.39  
**Estimated Cost at Completion (E\$AC):** 6,317,200.44  
**Total Budget:** 5,528,696.00  
**Variance (Budget minus E\$AC):** -189,502.44  
**Reason For Variance:** 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  
 Aug 31, 2019

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

#### Measures

	Units Complete	RR	HPI
<b>Current Goal:</b>	60	—	7
<b>Goal at Completion:</b>	900	—	7
<b>Current actual:</b>	14	—	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

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<b>Report Period</b>	July, 2019 (C.A.R.E.)	<b>Project Phase</b>	Planning
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<b>Risk Level</b>	<i>On Track</i>
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<b>Monthly Update</b>	<p>07/2019</p> <p>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 PIs will be making a decision regarding that protocol in August. As well, PIs 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>
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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 Accurint to move that process along.

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.

Reports are being delivered monthly to the UM PI. The first one was delivered this month.

06/2019

CARE released the self-administered survey on June 18, 2018. SRO has decided to go with Accurint 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.

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.

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 PIs 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.

SRO put in a request to have an on-site training since we will be using non-familiar systems and the request was granted.

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.

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**

Jun 30, 2019

<b>Total Cost to Date (Direct + Indirect):</b>	90,311.62
<b>Estimated Cost at Completion (E\$AC):</b>	921,621.52
<b>Total Budget:</b>	1,034,833.00
<b>Variance (Budget minus E\$AC):</b>	113,210.48
<b>Reason For Variance:</b>	01/2019 Programming and data management work that was budgeted is no longer a part of SRO's scope.

**Projections**

Jun 30, 2019

<b>Dollars Projected For Month:</b>	17,569.48
<b>Actual Dollars Used:</b>	15,374.08
<b>Variance (Projected minus Actual):</b>	2,195.40
<b>Reason For Variance:</b>	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> 10/15/2017</td> <td><b>Pretest Start:</b></td> </tr> <tr> <td><b>Pretest End:</b></td> <td><b>Recruitment Start:</b> 11/01/2017</td> </tr> <tr> <td><b>Staffing Completed:</b></td> <td><b>GIT Start:</b></td> </tr> <tr> <td><b>SS Train Start:</b> 01/22/2018</td> <td><b>SS Train End:</b> 01/23/2018</td> </tr> <tr> <td><b>DC Start:</b> 01/24/2018</td> <td><b>DC End:</b> 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>	July, 2019 (ED-Stars Continuation)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	On Track		

**Monthly Update**

Currently 121 Case interviews and 282 Control interviews have been completed, for a total of 403 completed interviews. We have been delivered 137 unique cases (first attempters) and have completed 94. Overall RR is 81% for closed cases. Controls continue to have a higher RR than Cases (85% for Controls and 74% 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 delivery remains very low, with an average of 1 per week for this month. Decreased case delivery continues as well, as suicide attempts generally decrease during the summer months, with an average of 2 per week in July 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 are beginning 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 with a slight underrun. We will continue to evaluate this in upcoming months.

**Special Issues****Cost**  
**Jul 31, 2019**

<b>Total Cost to Date (Direct + Indirect):</b>	486,844.24
<b>Estimated Cost at Completion (E\$AC):</b>	629,761.90
<b>Total Budget:</b>	529,284.00
<b>Variance (Budget minus E\$AC):</b>	10,659.10
<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**  
**Jul 31, 2019**

<b>Dollars Projected For Month:</b>	20,220.84
<b>Actual Dollars Used:</b>	19,011.05
<b>Variance (Projected minus Actual):</b>	1,209.79
<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>	403	80	2.86
<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:	<p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p>												
SRO Project Period	01/2017 - 12/2020												
Data Col Period	05/2018 - 12/2020												
Security Plan	NA												
Milestone Dates	<table><tr><td><i>PreProduction Start:</i></td><td><i>Pretest Start:</i></td></tr><tr><td><i>Pretest End:</i></td><td><i>Recruitment Start:</i></td></tr><tr><td><i>Staffing Completed:</i></td><td><i>GIT Start:</i></td></tr><tr><td><i>SS Train Start:</i></td><td><i>SS Train End:</i></td></tr><tr><td><i>DC Start:</i></td><td><i>DC End:</i></td></tr></table>			<i>PreProduction Start:</i>	<i>Pretest Start:</i>	<i>Pretest End:</i>	<i>Recruitment Start:</i>	<i>Staffing Completed:</i>	<i>GIT Start:</i>	<i>SS Train Start:</i>	<i>SS Train End:</i>	<i>DC Start:</i>	<i>DC End:</i>
<i>PreProduction Start:</i>	<i>Pretest Start:</i>												
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<i>Staffing Completed:</i>	<i>GIT Start:</i>												
<i>SS Train Start:</i>	<i>SS Train End:</i>												
<i>DC Start:</i>	<i>DC End:</i>												

**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** July, 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. An interviewer training occurred in Ann Arbor on July 29-30. The Spectrum Hospital (Grand Rapids) Recruiter/site Director, new MSU Project Coordinator, Beaumont Hospital Recruiter and new St.Joe/St. John Hospital Recruiter attended. Recruitment in these clinics is set to begin in September. Administrative, laboratory and IRB consent matters are still being addressed.

To date, 683 women have been recruited. Among those cases, 587 are still eligible and active in the study.

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[Phase 2: 3-Month Data Collection]

Babies born: 449  
 3-month sample released: 396  
 3-Month Interviews Completed: 261  
 Production HPI: 3.14  
 Average Attempts / lw: 6.92  
 lw length: 31.26  
 lw Rate: 77%

**Special Issues**

NIH will provide ECHO centers with all licenses required for neuro-developmental assessments in age 2 and 4 protocols and with data collection questionnaires programmed in REDCap. In addition, the PIs decided to take over data collection for the ARCH cohort, and telephone interviews for the MARCH cohort (ages 3 and 5). Funding for MMIP was not approved in Year 3 and beyond. The only data collections that SRO will be responsible for in project years 3-7 are 3 month telephone and age 4 in-person interviews. The decision was based on reduced NIH funds.

**Cost**

Jul 11, 2019

**Total Cost to Date (Direct + Indirect):** 374,540.99  
**Estimated Cost at Completion (E\$AC):** 458,473.04  
**Total Budget:** 471,539.00  
**Variance (Budget minus E\$AC):** 695.96

**Reason For Variance:**

-Year 2 ended with significant underrun (\$449,058.25) due to reduction in workscope for SRO.

-Years 3-7 budgets had reduced effort for project and data management. Within the first 3 months of Year 3, it was obvious that we needed additional funds to carry out the workscope that the study office was requesting from SRO. We communicated the need to the UM PI (Mike Elliott) and subsequently to the study office.

-In February, a budget was submitted to the study office to cover the overrun projected. This budget included estimates for SRO staff to edit the Computer Assisted Interviewing (CAI) Programming (Illume) prenatal surveys and sample management system in order to continue recruiting participants for the MARCH cohort.

-On April 24, MSU asked us to provide an updated budget and justification for the carryforward funds requested in February. We met with Mike Elliott on June 19 and determined the Year 2 carryforward funds are no longer needed at this time. Dr. Paneth decided not to follow the MARCH Non-Population Cohort and the MARCH No Prenatal Care sub-group is much smaller than anticipated. We are on track with the Year 3 budget. However, we did emphasize to the MSU team (client) that due to the shifting onboarding of clinics and current sample recruitment projections, it is likely by Year 5 (2020-21) we will need the additional funds. We will continue to monitor closely to assess our future needs.

Projections  
Jul 11, 2019

**Dollars Projected For Month:** 45,908.90  
**Actual Dollars Used:** 43,388.34  
**Variance (Projected minus Actual):** 2,520.56  
**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</b>	EDC Program Evaluation
<b>Names:</b>	YCombinator Research Basic Income Study
<b>Sample Mgmt Sys</b>	SurveyTrak
<b>Data Col Tool</b>	Blaise 4.8
<b>Hardware</b>	Laptop
<b>DE Software</b>	NA
<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>	July, 2019 (EDCPE)	<b>Project Phase</b>	Planning
<b>Risk Level</b>	<i>On Track</i>		
<b>Monthly Update</b>	<p>07/2019 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. 06/19 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 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 out the team after final decision on on-staffers is made.</p> <p>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 a securing training facility but to date nothing has been confirmed as available within a 30 mile radius of UM - still waiting o hear from a few hotels.</p> <p>The delay, among other factors, has severely affected the budget. More than expected changes in the questionnaire, changes in protocol, rehiring lwers (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 be provide them with more recent updated projections, based on current information and assumptions.</p> <p>03/2019 Training date of July to be confirmed by April 1st by client. Currently continuing work is being done on Blaise instrument.</p>		

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 Iws.

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 Iwers 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 ammendments - 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 for 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 Iwers 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 spec'ing 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  
Jun 30, 2019

<b>Total Cost to Date (Direct + Indirect):</b>	498,329.37
<b>Estimated Cost at Completion (E\$AC):</b>	2,256,240.02
<b>Total Budget:</b>	1,963,818.00
<b>Variance (Budget minus E\$AC):</b>	-292,422.02
<b>Reason For Variance:</b>	

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 Pls.

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  
Jun 30, 2019

<b>Dollars Projected For Month:</b>	18,891.51
<b>Actual Dollars Used:</b>	45,980.76
<b>Variance (Projected minus Actual):</b>	1,101.99

**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** July, 2019 (HRS 2018)    **Project Phase** Closing

**Risk Level** Some Concerns

**Monthly Update** HRS 2018: During month of July, the team focused on addressing questions from project staff, reconciling logging issues, 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 103 completed interviews with 60 appointments for the

coming weeks (goal # of interviews is 579). The overall average interview length is currently 47.8 minutes. Cost to complete is estimated at \$785,653.81 which is within the approved ballpark (\$790,200-\$918,300).

### Special Issues

**Cost**  
Jun 01, 2019

**Total Cost to Date (Direct + Indirect):** 18,206,875.27  
**Estimated Cost at Completion (E\$AC):** 18,119,991.73  
**Total Budget:** 18,139,654.00  
**Variance (Budget minus E\$AC):** -1,203,119.73  
**Reason For Variance:**

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.

**Projections**  
Jun 01, 2019

**Dollars Projected For Month:** 230,183.91  
**Actual Dollars Used:** 252,668.91  
**Variance (Projected minus Actual):** -22,485.00  
**Reason For Variance:**

Higher than projected respondent payments due to end game and staff hours for close-out activities that had not been accurately projected (projections for remainder of close-out period have been updated).

### Measures

	Units Complete	RR	HPI
<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"> <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
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<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>	July, 2019 (HRS 2020)	<b>Project Phase</b>	Initiation										
<b>Risk Level</b>	Some Concerns												
<b>Monthly Update</b>	<p>During the month of July, 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. The decision about which technical systems will be used for the Pretest will be made at the end of this month. Work continues to create a test HRS 2020 project in MSMS and then incorporate the HRS task rules and features required for the HRS protocol as they become available.</p>												
<b>Special Issues</b>													



**Cost**  
**Jun 01, 2019**

**Total Cost to Date (Direct + Indirect):** 247,354.79  
**Estimated Cost at Completion (E\$AC):** 17,464,482.03  
**Total Budget:** 16,267,431.00  
**Variance (Budget minus E\$AC):** -1,197,051.03  
**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**  
**Jun 01, 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
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<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>	Taghreed 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>	July, 2019 (H&WB)	<b>Project Phase</b>	Planning
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<b>Risk Level</b>	Some Concerns
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<b>Monthly Update</b>	Pre-production work continued throughout the month of July. This included reviewing English questionnaires provided by the PIs, adding our comments and edits for PI review, and putting the various questionnaire components into Blaise spec format. Blaise instruments include: screening, informant, main survey, cognitive tests, physical measures, contact observations. The PIs will conduct a pilot test of the Arabic translation of the cognitive tests in August. Taghreed attended the training and will collect interviews for the pilot. Version Y, used by DCO to certify bilingual interviewers, was translated to Arabic in July. The technical team is fully engaged in creating technical systems to support the data collection as well as to determine the software needs to display and write in Arabic, as well as options for an Arabic keyboard that could be used both for screening and interviewing. A decision was made by the PIs to
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separate the pretest and main data collection IRB submissions. The pretest will be submitted as an amendment to the MiCDA pilot. An application for main data collection was submitted in order to receive review and approval of the full study protocol, English language questionnaires, and a request to waive signed consent for this study population. Once that amendment is reviewed and approved, the pretest amendment will be created uploading the approved instruments in English. For main data collection, additional amendments will be required for any changes to the English questionnaire, for the Arabic translations, as well as all of the respondent recruitment and contact materials. If the IRB application is required to go to full board review, the pretest will likely be delayed further. The timeline for the Arabic translation is still under discussion but will hopefully be completed by the end of August. Testing of all survey instruments, hiring pretest interviewers, and the development of study and training materials will take place in August and September. Additionally, the PI team and their advisory board renamed the study in their July meeting. It will now be referred to as D-AMP (Detroit Aging and Memory Project) on all participant materials and to interviewers. SRO account names and file structure has not been changed.

**Special Issues**

Three additional budgets were provided to the PIs based on requests for additional workscope. The additional workscope includes collection of saliva samples for genetic analysis, full survey and cognitive tests for Social Relations sample members, additional days of training beyond the 2 days originally budgeted.

**Cost  
Jul 19, 2019**

**Total Cost to Date (Direct + Indirect):** 93,301.75  
**Estimated Cost at Completion (E\$AC):** 2,145,780.62  
**Total Budget:** 2,145,793.00  
**Variance (Budget minus E\$AC):** 12.38  
**Reason For Variance:**

This cost to complete estimate does not include the additional hour of interviewing for the Social Relations sample, nor does it include the additional days of training or saliva collection. Budgets for each of the three additional components have been provided to the PI.

**Projections  
Jul 19, 2019**

**Dollars Projected For Month:** 63,923.61  
**Actual Dollars Used:** 46,500.17  
**Variance (Projected minus Actual):** 16,793.44  
**Reason For Variance:**

Actual costs were lower than projected due to a shift in the timeline based on the PIs schedule (final questionnaires not ready, etc). Thus, recruitment was delayed and costs were not incurred, and less project management and programmer time was incurred. The decreased programmer and project manager hours are also due to competing project demands for all team members.

**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** High Intensity Drinking (HID)

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

**Project Type** Sponsored Projects **Project Status** Deactivated

**Budget** **Direct Budget:** 364,732.00 **Indirect Budget:** 204,250.00 **Total Budget:** 568,982.00

**Principal Investigator/Client** Megan Patrick (Univ of Minnesota)

**Funding Agency**

**IRB** **HUM#:** 00159183 **Period Of Approval:**

**Project Team** **Project Lead:** Peter Rakesh Batra  
**Budget Analyst:** Parina Kamdar  
**Production Manager:**  
**Senior Project Advisor:** Kirsten Haakan Alcser  
**Production Manager:**  
**Production Manager:**

**Proposal #:** no data

**Description:** SRO's work on this project includes administering multiple web surveys to a sample of respondents who participated as 12th graders in Monitoring the Future's Base Year study. Using a starting sample of approximately 2000 respondents from MTF, SRO will administer a data collection "burst" consisting of one 30-minute survey and 14 days of 7-minute surveys every 12 months for 4 years. SRO will conduct all surveys as self-administered web surveys, with no telephone contact to respondents. SRO will coordinate all electronic contact with respondents (email and text message), but will not handle any paper mailings, respondent management or the payment of respondent incentives. SRO's activity will start in February 2019, with the first data collection burst in May 2019, lasting through to the first week of July 2019.. Deliverables include final copies of the questionnaires (including programming source code), clean and documented data sets from each of the data collection bursts, and a methodological report on protocols.

**SRO Project Period** 03/2019 - 07/2020

**Data Col Period** 05/2019 - 07/2019

**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:** Hueichun Peng, Gary Hein

**Other Project Names:**

**Sample Mgmt Sys** Web SMS

**Data Col Tool** Illume

**Hardware** NA

**DE Software** NA

**QC Recording Tool** NA

**Incentive** Yes, R

**Administration** NA

**Payment Type** Check, prepaid (\$25)

**Payment Method** Check through other system (handled by Study Staff)

**Report Period** July, 2019 (HID) **Project Phase** Implementing

**Risk Level** On Track

**Monthly Update** Today was our last day of production! We managed to achieve a 38.6% Response rate for those Respondents who completed the Annual survey, which is about where we thought we would be. Out of those, our preliminary data shows that 86% completed at least one diary/daily survey. The tasks remaining on this project include: delivery of the daily surveys (annual was already delivered and accepted), produce the Wave 1 summary statistics (in conjunction with the project team) and plan for Wave 2 next year. We are on track budget wise and currently projecting a \$200K under-run

which we will let the project team know about. Lastly, I will be scheduling a project review meeting to go over Wave 1 and also explain the under-run.

### Special Issues

<b>Cost</b> Jul 31, 2019	<b>Total Cost to Date (Direct + Indirect):</b>	85,541.87	
	<b>Estimated Cost at Completion (E\$AC):</b>	359,368.63	
	<b>Total Budget:</b>	568,982.00	
	<b>Variance (Budget minus E\$AC):</b>	209,613.37	
	<b>Reason For Variance:</b>	Mainly our scope has been significantly reduced as the project team is handling much of the day-to-day respondent activity.	

<b>Projections</b> Jul 31, 2019	<b>Dollars Projected For Month:</b>	0.00
	<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> <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>	July, 2019 (HCDC, H&C)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	<i>Some Concerns</i>		
<b>Monthly Update</b>	<p>During July 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. Worked with financial staff at Johns Hopkins to triage and respond to issues related to late invoice payments, award renewal, and award close out. <ul style="list-style-type: none"> <li>Responded to inquiries from the University of Michigan related to delinquent invoice payments.</li> <li>Prepared and submitted summary of funded awards to NICHD scientific officer.</li> </ul> </li> <li>Prepared ballpark estimate for possible new Robert Wood Johnson award.</li> <li>Prepared and submitted updated summary of HCHD project and task schedule to NICHD scientific officer.</li> <li>Held meeting to discuss Wave 1 response rates.</li> <li>Updated PCG questionnaire timing files; responded to inquiries about PCG questionnaire timing, and PCG questionnaire changes.</li> <li>Pursued contact with ZRT labs regarding the HCHD Wave 2 blood spot protocol. Confirmed supply, data collection, and shipping requirements for Wave 2.</li> <li>Provided updates to SRO technical team regarding Wave 2 schedule, work scope and staffing needs.</li> </ul> <p>Task 2: Sampling</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> <li>Conducted meeting to discuss Wave 1 response rates in detail.</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>No effort this month</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>		

## Task 11: Final Data Deliverables

## % Task Spent to Date

- No effort this month

## 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.
- Unresolved IRB issues related to blood spot collection and analysis will negatively impact the project schedule, and may negatively impact project cost due to the need to add personnel to meet revised deadlines for Wave 2.
- The PCG questionnaires (in-area and out-of-area) for Wave 2 must be completed by July 30 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.

## 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.
- 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 21 pages and child length at 8 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.

Cost  
Jul 11, 2019

**Total Cost to Date (Direct + Indirect):** 8,937,586.38

**Estimated Cost at Completion (E\$AC):** 11,886,337.39

**Total Budget:** 11,843,058.00

**Variance (Budget minus E\$AC):** -43,319.39

**Reason For Variance:**

The overrun is related to additional administrative expenses incurred during the project close down period related to management and monitoring of project financial issues (past due invoices, requests for budgets for carryovers, etc) and questionnaire development tasks. We expect that project will be managed to the available budget, and future work scope will be reduced to meet the available funding.

Projections  
Jul 11, 2019

**Dollars Projected For Month:** 16,831.00

**Actual Dollars Used:** 19,183.00

**Variance (Projected minus Actual):** -2,352.00

**Reason For Variance:**

More administrator hours than budgeted were used due to the need to manage past due invoices and repeated requests for budgets for no-cost time extensions.

## 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)

<b>Report Period</b>	July, 2019 (HRS Actigraphy Pilot)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	On Track		
<b>Monthly Update</b>	July updates		
<b>Special Issues</b>	N/A		
<b>Cost</b>			
<b>Jun 30, 2019</b>	<b>Total Cost to Date (Direct + Indirect):</b>	16,625.96	
	<b>Estimated Cost at Completion (E\$AC):</b>	69,270.26	
	<b>Total Budget:</b>	74,410.00	
	<b>Variance (Budget minus E\$AC):</b>	5,139.74	
	<b>Reason For Variance:</b>	We have not yet used projected SSL help and one additional project management resource has been busy with other projects.	
<b>Projections</b>			
<b>Jun 30, 2019</b>	<b>Dollars Projected For Month:</b>	28,154.03	
	<b>Actual Dollars Used:</b>	11,345.27	
	<b>Variance (Projected minus Actual):</b>	16,808.76	
	<b>Reason For Variance:</b>	Duplicating, postage, and check cashing for tokens will need to be pushed forward as they have not yet hit the budget.	

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>	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%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"><b>PreProduction Start:</b> 05/01/2019</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> 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>	July, 2019 (CAMS 2019)	<b>Project Phase</b>	Initiation
<b>Risk Level</b>	On Track		
<b>Monthly Update</b>	During July, the team worked on questionnaire and respondent material changes. We also coordinated with the HRS Spanish translator. Projections were updated in CRS. The team also submitted the amendment to IRB.		
<b>Special Issues</b>			

**Cost**  
**Jun 30, 2019**

*Total Cost to Date (Direct + Indirect):* 1,626.70  
*Estimated Cost at Completion (E\$AC):* 411,726.62  
*Total Budget:* 415,183.56  
*Variance (Budget minus E\$AC):* 73.62  
*Reason For Variance:* SSL Rate Change

**Projections**  
**Jun 30, 2019**

*Dollars Projected For Month:* 2,689.93  
*Actual Dollars Used:* 1,180.09  
*Variance (Projected minus Actual):* 1,509.84  
*Reason For Variance:* Staff hours projected in June will be used in future months, projections pushed forward.

**Measures**

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

**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%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"><b>PreProduction Start:</b> 04/01/2016</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> 06/01/2016</td> </tr> <tr> <td style="padding: 5px;"><b>Staffing Completed:</b> 06/28/2019</td> <td style="padding: 5px;"><b>GIT Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>SS Train Start:</b> 06/12/2019</td> <td style="padding: 5px;"><b>SS Train End:</b> 06/12/2019</td> </tr> <tr> <td style="padding: 5px;"><b>DC Start:</b> 06/18/2019</td> <td style="padding: 5px;"><b>DC End:</b> 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													
<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>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

<b>Report Period</b>	July, 2019 (HRS - LHMS 2019)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	<i>Some Concerns</i>		
<b>Monthly Update</b>	<p>LHMS Activities, July 2019</p> <p>Management</p> <ul style="list-style-type: none"> <li>Reviewed charges, updated projections and cost report</li> <li>Prepared materials for final IRB submission (typos, translation corrections)</li> <li>Updated project schedule</li> <li>Finalized end date for non-response calling (Aug 31).</li> <li>Updated logging hours projections</li> <li>Updated monitoring spreadsheet</li> <li>Monitored SSL calling operations; recommended adjustments as necessary</li> </ul> <p>Sample</p> <ul style="list-style-type: none"> <li>Delivered sample to vendor for the non-response study</li> <li>Delivered checks to vendor for the main study and non-response study</li> <li>Received updated sample for the non-response study which included prioritization variable</li> <li>Removed sample lines that overlap with the Neuro study.</li> </ul> <p>Questionnaire Development</p> <ul style="list-style-type: none"> <li>Conducted iterative reviews/proofing to SAQs and study documents in English &amp; Spanish</li> </ul> <p>Systems Development/Programming</p> <ul style="list-style-type: none"> <li>Conducted iterative specifications updates/testing/programming to the logging program</li> <li>Incorporated reports for weekly reconciliation</li> <li>Programmed progress reports for the Survey Services Lab work</li> <li>Updated preload for Blaise SMS (family connections, calling algorithms and instructions, timing between calls)</li> </ul> <p>Training</p> <ul style="list-style-type: none"> <li>Trained new logger</li> <li>Prepared and printed questionnaires for training</li> <li>Finalized powerpoint slides for interviewer training</li> <li>Created a script for interviewer training</li> <li>Conducted training for Survey Services Lab interviewers (10 interviewers)</li> </ul> <p>Main Data Collection</p> <ul style="list-style-type: none"> <li>2nd SAQs were shipped on July 16, 2019</li> <li>Reminder cards/Thank you cards were shipped on July 30, 2019</li> <li>Conducted logging operations; responded to toll-free line calls and email inquiries.</li> <li>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.</li> <li>As of July 30, 2019: <ul style="list-style-type: none"> <li>Main Study: logged 991 interviews, 1187 finalized sample lines; interim response rate 27%</li> <li>Non-Response: logged 105 interviews; 192 finalized sample lines; interim response rate 10%</li> </ul> </li> </ul> <p>Post-Collection Processing</p> <ul style="list-style-type: none"> <li>Packaged and shipped completed questionnaires on a weekly basis.</li> <li>Finalized English scanning instructions.</li> </ul>		

**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 lower response rates (leading to lower scanning costs). Non-response reminder/interview calling will end on August 31 to eliminate overlap with other HRS fall mail studies. The projected underrun is currently \$70,000; the number will be updated once updated estimates are received from the scanning vendor.

**Cost**

Jul 31, 2019

**Total Cost to Date (Direct + Indirect):** 328,069.25

**Estimated Cost at Completion (E\$AC):** 620,036.52

**Total Budget:** 691,201.00

**Variance (Budget minus E\$AC):** 71,164.48

**Reason For Variance:**

The project will incur a substantial underrun due to the truncated calling protocol (7 weeks) and lower response rates (leading to lower scanning costs). Non-response reminder/interview calling will end on August 31 to eliminate overlap with other HRS fall mail studies. The projected underrun is currently \$70,000; the number will be updated once updated estimates are received from the scanning vendor.

**Projections**

Jul 31, 2019

**Dollars Projected For Month:** 114,581.00

**Actual Dollars Used:** 162,945.00

**Variance (Projected minus Actual):** -48,364.00

**Reason For Variance:**

Vendor costs which were billed up front were \$36,727 higher than projected (projection error), and R payments were \$2687 higher than projected. Projections have been updated to anticipate when vendor billings may actually arrive.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>	2745 iws	60% mail; 50% tele	5.0 telephone
<b>Goal at Completion:</b>			
<b>Current actual:</b>	1096 iws	27% mail; 10% tele	20 hpi telephone
<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
<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												
<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												
<b>Sample Mgmt Sys</b>	HRS NPS 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>	July, 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 July, 2020 at the earliest (barring a reduction in the goal of 105 completed imaging appointments).		



[Data Collection - Site Activation] MI-region sample (UM) was activated in late-March, 2019 and site work is underway. CA-region sample (USC) was activated in mid-May, 2019 and work began after an unanticipated one-month delay. Columbia received IRB approval on 7/16/2019, but some institutional approvals are still required before we can begin contacting NY-region respondents.

[HPI Calculation ("Hours per Recruitment")]

The HPI listed below has been updated. This project does not have standard FPRs and the previous method for manually calculating so-called Hours per Recruitment (SRO interviewers successfully recruiting someone into the study) was incorrect (i.e. included TL hours, rather than interviewer hours only). As such, the current HPI as of this month's report has dropped from ~3 to ~1 and is now much closer aligned with project expectations.

[Budget] Current projections have management hours dropping to 30-40 per month from May, 2019 and effectively all staff hours ending in November, 2019. Project manager and SPA planning to meet with SRC team sometime to discuss both recent management needs and impact of project extension through June, 2020 (an increase of two months over most recent expectations).

[Protocols + IRB (UM)] An amendment to the Coordinating Center application is expected soon to handle some administrative changes to the eResearch application and protocol documents.

[External IRB] As of mid-July, 2019 all three sites have received IRB approval. Columbia is awaiting final approval from their PET center, which is the last item needed before NY-region production can begin.

[Study Protocol] (1) A question has come up regarding the situations in which site teams may access and review a respondent's medical record. (2) An application for a Certificate of Confidentiality is nearly complete; we hope a CoC will be in place sometime before end-of-August, 2019.

**Special Issues**

- (1) Managing complex workflow across multiple external sites with different operational considerations and internal protocols
- (2) Completion of some data collection work prior to issuance of a Certificate of Confidentiality
- (3) Ensuring effective monitoring in the absence of coordinating center staff with clinical expertise.

**Cost**  
**Jun 30, 2019**

<b>Total Cost to Date (Direct + Indirect):</b>	125,677.11
<b>Estimated Cost at Completion (E\$AC):</b>	191,580.56
<b>Total Budget:</b>	186,301.00
<b>Variance (Budget minus E\$AC):</b>	-5,279.56
<b>Reason For Variance:</b>	Due to an expected extension of the data collection period (as of July, 2019 now expected to continue through July, 2020), existing budget projections are out of date. Projections will be updated as soon as we have a better sense of the effort required to maintain ongoing data collection and manage field/recruitment and imaging site activities. A projections and budget conversation are expected to take place with the PI sometime in mid-August.

**Projections**  
**Jun 30, 2019**

<b>Dollars Projected For Month:</b>	15,651.66
<b>Actual Dollars Used:</b>	9,510.38
<b>Variance (Projected minus Actual):</b>	6,141.28
<b>Reason For Variance:</b>	The projected overrun (based on existing, out-of-date projections) has begun to climb as we've now entered a period where the existing projections show SRO hours and costs peaking for the data collection period. However, as imaging site effort has not reached full capacity yet, these costs have been pushed forward. Secondly, existing projections show SRO hours tapering off from this point onward, which they are likely to remain steady for at least a few more months.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>	105	65%	3.0 (tentative)
<b>Goal at Completion:</b>	[pending]	[pending]	[pending]
<b>Current actual:</b>	4	7.4%	0.97
<b>Estimate at Complete:</b>	[pending]	[pending]	[pending]
<b>Variance:</b>	[pending]	[pending]	[pending]

**Other Measures**

As of 7/29/2019:  
 [SRO Recruitment Rate - Goal] - 90.0%  
 [SRO Recruitment Rate - Current] - 59.3% (32 recruited / 36 finalized); 12 non-final  
 [Projected Completion / Scan Rate] 16.7% (4 completed / 24 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>	July, 2019 (OYMS 2019)	<b>Project Phase</b>	Initiation										
<b>Risk Level</b>	On Track												
<b>Monthly Update</b>	This month the project team has worked on finalizing sample, updating materials, and working on a re-budget for telephone follow up, and occ/ind coding.												
<b>Special Issues</b>													
<b>Cost Jun 30, 2019</b>	<table border="0" style="width: 100%;"> <tr> <td><b>Total Cost to Date (Direct + Indirect):</b></td> <td style="text-align: right;">1,154.02</td> </tr> <tr> <td><b>Estimated Cost at Completion (E\$AC):</b></td> <td style="text-align: right;">753,683.21</td> </tr> <tr> <td><b>Total Budget:</b></td> <td style="text-align: right;">758,213.00</td> </tr> <tr> <td><b>Variance (Budget minus E\$AC):</b></td> <td style="text-align: right;">-789.79</td> </tr> <tr> <td><b>Reason For Variance:</b></td> <td>SSL Rate Change</td> </tr> </table>			<b>Total Cost to Date (Direct + Indirect):</b>	1,154.02	<b>Estimated Cost at Completion (E\$AC):</b>	753,683.21	<b>Total Budget:</b>	758,213.00	<b>Variance (Budget minus E\$AC):</b>	-789.79	<b>Reason For Variance:</b>	SSL Rate Change
<b>Total Cost to Date (Direct + Indirect):</b>	1,154.02												
<b>Estimated Cost at Completion (E\$AC):</b>	753,683.21												
<b>Total Budget:</b>	758,213.00												
<b>Variance (Budget minus E\$AC):</b>	-789.79												
<b>Reason For Variance:</b>	SSL Rate Change												

**Projections**  
**Jun 30, 2019**

**Dollars Projected For Month:** 1,832.49  
**Actual Dollars Used:** 726.16  
**Variance (Projected minus Actual):** 1,106.33  
**Reason For Variance:** Hours worked in June will hit in July for bi-weekly paid staff. Pushed projections forward.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>	7020	54%*	
<b>Goal at Completion:</b>	7020	54%	
<b>Current actual:</b>			
<b>Estimate at Complete:</b>	7020	54%	
<b>Variance:</b>			

**Other Measures**

\*Response rate estimate based on 2015 and 2017 LHMS of 54%.

<b>Project Name</b>	India Human Development Survey Wave 3 (IHDS3)				
<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> 333,895.61	<b>Indirect Budget:</b> 198,006.92	<b>Total Budget:</b> 531,902.53		
<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>	National Institutes of Health, Department of Health and Human Services				
<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>	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.				
<b>SRO Project Period</b>	01/2019 - 05/2022				
<b>Data Col Period</b>	06/2020 - 05/2022				
<b>Security Plan</b>	NA				
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center; 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%; text-align: center; 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>	Other (TBD)				
<b>QC Recording Tool</b>	DRI-CARI				
<b>Incentive</b>	Yes, Other (TBD)				
<b>Administration</b>	Other (TBD)				
<b>Payment Type</b>	Other (TBD)				
<b>Payment Method</b>	Other (TBD)				

<b>Report Period</b>	July, 2019 (IHDS3)	<b>Project Phase</b>	Planning
<b>Risk Level</b>	On Track		
<b>Monthly Update</b>	1. Coordinate with the tech team to design and test sid spawning and shared-preload; 2. Discuss with clients on designing ACASI, EHC, and track split HHs and develop the proposal discussion on 8/1; 3. Keep working with clients on determining timeline and scope of work		
<b>Special Issues</b>	Note: IHDS3 will not fill sections below because data collection is not parts of the scope of work.		

**Cost**  
**Jun 30, 2019**

**Total Cost to Date (Direct + Indirect):** 26,166.28  
**Estimated Cost at Completion (E\$AC):** 527,406.65  
**Total Budget:** 531,902.53  
**Variance (Budget minus E\$AC):** 4,495.88  
**Reason For Variance:** Add 256 hours for Zeina (for now) so the variance reduced significantly in June 2019; actual projection will adjusted after client's visit in late August/early September (TBD)

**Projections**  
**Jun 30, 2019**

**Dollars Projected For Month:** 9,777.05  
**Actual Dollars Used:** 8,508.93  
**Variance (Projected minus Actual):** 1,268.12  
**Reason For Variance:** Less vacation accrual (campus), less fringe benefits

**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>	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>	July, 2019 (MTF Web 2019)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	On Track		
<b>Monthly Update</b>	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

Jun 30, 2019

<b>Total Cost to Date (Direct + Indirect):</b>	426,937.90
<b>Estimated Cost at Completion (E\$AC):</b>	603,235.29
<b>Total Budget:</b>	642,483.00
<b>Variance (Budget minus E\$AC):</b>	39,247.71
<b>Reason For Variance:</b>	Variance arises from incomplete projections for programming to be done over the summer. Will be updated.

##### Projections

Jun 30, 2019

<b>Dollars Projected For Month:</b>	18,638.84
<b>Actual Dollars Used:</b>	11,777.69
<b>Variance (Projected minus Actual):</b>	6,861.15
<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>	July, 2019 (NDIC DMAS)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	On Track		
<b>Monthly Update</b>	1. Continue to close out Baseline and Monthly 01 projects; 2. Update data manager to-do-list to help data manager proceed survey lifecycle and closeout procedure; 3. Update Contact Obs reports for the monthly production monitoring		



due to revised PBD; 4. Update installation folders to prepare upcoming Help Desk staff training with clients; 5. Prepare and release Monthly/Quarterly/Hospitalization SIDs; 5. Resolve tCAPI error issue for a specific laptop and restore all recently completed interviews; 6. Specify a new report to collect all updated monthly project Rs' contact information.

**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>	209,742.76
<b>Estimated Cost at Completion (E\$AC):</b>	443,517.07
<b>Total Budget:</b>	450,261.00
<b>Variance (Budget minus E\$AC):</b>	6,743.93
<b>Reason For Variance:</b>	Reserve hours for potential data manager training efforts

**Projections**

Jul 31, 2019

<b>Dollars Projected For Month:</b>	7,810.59
<b>Actual Dollars Used:</b>	8,714.91
<b>Variance (Projected minus Actual):</b>	-904.32
<b>Reason For Variance:</b>	More efforts in STrak programming/testing are needed than projected.

**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>	July, 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 5 of Q32, the last quarter of data collection for this NSFG contract. There are currently 636 main interviews and 2811 screeners completed. We are above the average for this point in the quarter and since the age range expansion for both main and screeners, even given the increased main iw goal due to a larger sample release to increase interview yield the last 2 quarters. The current adjusted main interview goal for today is 521 for minimum target of 1421 main iws for the Q in order to reach 5500 for the year (an additional 500 main iws), and 596 if the goal for the Q were increased to 1550. Since we are at 636 we are above goal for both benchmarks. In addition, we have already exceeded the next highest producing PUF this contract, already completing 10,509 main iws for this PUF (PUF 4) with 7 weeks left. The next highest yielding PUF was PUF 2, at 10,416 by the end of week 12. The Screener</p>
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completion rate is currently 55.7%. The goal for today is 63.0%, so we are behind, although less behind when compared to the current cycle average (59.7%) and since the age range expansion (57.5%). The current HPI is 10.6. HPI is slightly above average for this point in the quarter (10.0), as well as since the age range expansion (10.5). We have lost 2 interviewers the last 2 weeks, one due to health issues and one due to being accepted to graduate school. The areas will be covered by travel. There are no plans for another interviewer training this last Quarter of data collection. 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 production, budget, staffing, sampling concerns for Q32 so that we can continue to make adjustments and be as responsive to production needs as soon as possible as we approach the end of data collection for this cycle. Although we are not completely aware of NCHS' expectations for end of contract deliverables, 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**  
**Jul 31, 2019**

**Total Cost to Date (Direct + Indirect):** 42,632,926.07  
**Estimated Cost at Completion (E\$AC):** 44,747,043.00  
**Total Budget:** 41,101,388.47  
**Variance (Budget minus E\$AC):** -338,269.00  
**Reason For Variance:** The total NSFG budget with all approved contract mods is actually \$44,408,774.00. 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**  
**Jul 31, 2019**

**Dollars Projected For Month:** 599,036.51  
**Actual Dollars Used:** 571,392.36  
**Variance (Projected minus Actual):** 27,644.15  
**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>	521	42.2	10.6
<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>	PSID Child Development Supplement V (2019) (CDS-19)												
<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> 5,801,561.00	<b>Indirect Budget:</b> 3,164,398.00	<b>Total Budget:</b> 8,965,959.00										
<b>Principal Investigator/Client</b>	Narayan Sastry (SRC) Paula Fomby (SRC)												
<b>Funding Agency</b>	NICHD, Robert Wood Johnson Foundation												
<b>IRB</b>	<b>HUM#:</b> HUM00075944	<b>Period Of Approval:</b>	6/11/18 - 6/10/19										
<b>Project Team</b>	<b>Project Lead:</b> Rachel Anne Orlowski <b>Budget Analyst:</b> Megan Gomez-Mesquita <b>Production Manager:</b> Dianne G Casey <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>A 2019 wave of the Childhood Development Supplement (CDS) is planned for September 2019 – May 2020. The sample for CDS is comprised of the PSID-eligible children (ages 0 -17) from the Core 2019 families we interview and their primary caregivers. Approximately 3,700 families will be included, with some Core families containing several CDS children. As part of the CDS, families are asked to complete multiple interviews (i.e., coverscreen, PCG interview, Child interview--including an IVR component) and data collections (i.e., physical measurements, educational assessments, saliva collection, time diaries, school and birth record linkage forms), several of which are completed in-person. CDS interviewing will be conducted by Field interviewers, with the SSL supporting follow-up efforts. SurveyTrak and Blaise 4.8 will be the primary technical systems employed.</p>												
<b>SRO Project Period</b>	09/2018 - 08/2020												
<b>Data Col Period</b>	09/2019 - 05/2020												
<b>Security Plan</b>	NA												
<b>Milestone Dates</b>	<table border="1"> <tr> <td><b>PreProduction Start:</b> 01/07/2019</td> <td><b>Pretest Start:</b> 07/15/2019</td> </tr> <tr> <td><b>Pretest End:</b> 08/04/2019</td> <td><b>Recruitment Start:</b> 05/02/2019</td> </tr> <tr> <td><b>Staffing Completed:</b> 08/05/2019</td> <td><b>GIT Start:</b> 09/16/2019</td> </tr> <tr> <td><b>SS Train Start:</b> 09/18/2019</td> <td><b>SS Train End:</b> 09/23/2019</td> </tr> <tr> <td><b>DC Start:</b> 10/01/2019</td> <td><b>DC End:</b> 05/31/2019</td> </tr> </table>			<b>PreProduction Start:</b> 01/07/2019	<b>Pretest Start:</b> 07/15/2019	<b>Pretest End:</b> 08/04/2019	<b>Recruitment Start:</b> 05/02/2019	<b>Staffing Completed:</b> 08/05/2019	<b>GIT Start:</b> 09/16/2019	<b>SS Train Start:</b> 09/18/2019	<b>SS Train End:</b> 09/23/2019	<b>DC Start:</b> 10/01/2019	<b>DC End:</b> 05/31/2019
<b>PreProduction Start:</b> 01/07/2019	<b>Pretest Start:</b> 07/15/2019												
<b>Pretest End:</b> 08/04/2019	<b>Recruitment Start:</b> 05/02/2019												
<b>Staffing Completed:</b> 08/05/2019	<b>GIT Start:</b> 09/16/2019												
<b>SS Train Start:</b> 09/18/2019	<b>SS Train End:</b> 09/23/2019												
<b>DC Start:</b> 10/01/2019	<b>DC End:</b> 05/31/2019												
<b>Other Project Team Members:</b>													
<b>Other Project Names:</b>													
<b>Sample Mgmt Sys</b>	SurveyTrak												
<b>Data Col Tool</b>	Blaise 4.8												
<b>Hardware</b>	Laptop; [UM cell] Phone												
<b>DE Software</b>	Other												
<b>QC Recording Tool</b>	Camtasia												
<b>Incentive</b>	Yes, R												
<b>Administration</b>	ISR Group (PSID)												
<b>Payment Type</b>	Check, post; Cash, post												
<b>Payment Method</b>	Check through other system (PSID-RAPS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (PS)												
<b>Report Period</b>	July, 2019 (CDS-19)	<b>Project Phase</b>	Planning										
<b>Risk Level</b>	On Track												
<b>Monthly Update</b>	<p>Eliminated one new hire recruitment areas since able to staff existing iwers. On-going recruitment effort in 10 areas. Held in-person training 8 Pretest iwers from 7/8-7/12 (home study preceded). Planned to launch Pretest on 7/15 but delayed due to pending IRB approval.</p> <p>On 7/15, received partial IRB approval; still unable to collect other adult saliva samples. Fomby and Orlowski prepared to join IRB Full Board on 7/18 but not invited to meet with them. Addressed multiple IRB contingency requests throughout review process. Notified of full Pretest approval on 7/25.</p> <p>IDPM signed off on Pretest Blaise instruments on 7/17. SRO signed off on Pretest SurveyTrak on 7/17.</p>												

Launched Pretest data collection on 7/18 but held adolescent iws due to IVR testing until 7/19 and held collection of other adult saliva samples due to IRB until 7/25. As of 7/31 (n=45 FUs):

Coverscreens - 33 completes, 1 unable to locate, 1 refusal

PCG Iws - 30 completes

Child Iws - 6 completes

In-home visits - 10 completes

Other adult samples - 2

Production tech development, training development, SSL protocol development, reporting development, QC preparation, and IRB application preparation underway.

#### Special Issues

##### Cost

Jun 30, 2019

<b>Total Cost to Date (Direct + Indirect):</b>	805,121.10
<b>Estimated Cost at Completion (E\$AC):</b>	8,965,946.20
<b>Total Budget:</b>	8,965,959.00
<b>Variance (Budget minus E\$AC):</b>	12.80
<b>Reason For Variance:</b>	Minor variance - moving underrun to MDC Travel (underrun has decreased due to CDS19-specific phones and phone plans)

##### Projections

Jun 30, 2019

<b>Dollars Projected For Month:</b>	229,627.81
<b>Actual Dollars Used:</b>	162,340.23
<b>Variance (Projected minus Actual):</b>	67,287.58
<b>Reason For Variance:</b>	Less programming, recruitment, & project support.

##### 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>	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** July, 2019 (WMH-Qatar) **Project Phase** Implementing

**Risk Level** On Track

**Monthly Update** 1. Receive and review clients' ACASI Blaise data model programming; 2. Continue to determine database types for SMS and Blaise instruments; 3. Continue to communicate with Stephanie C. on CIDI training projections (est. October 2019); 4. SESRI/clients are on summer vacation from mid-July to the end of August so the team has been coordinating activities accordingly within this period and detail project timeline.

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

**Cost**  
**Jun 30, 2019**

<b>Total Cost to Date (Direct + Indirect):</b>	5,430.36	
<b>Estimated Cost at Completion (E\$AC):</b>	77,486.21	
<b>Total Budget:</b>	74,928.00	
<b>Variance (Budget minus E\$AC):</b>	-2,558.21	
<b>Reason For Variance:</b>	Added previous uncharged hours in April/May (Gina, Jay) to the later stage of the project; PM will adjust hour allocations and work scope once receives the CIDI training projections.	

**Projections**  
**Jun 30, 2019**

<b>Dollars Projected For Month:</b>	1,832.83	
<b>Actual Dollars Used:</b>	2,107.57	
<b>Variance (Projected minus Actual):</b>	-274.74	
<b>Reason For Variance:</b>	Sarah's loading rate increases in June, which is higher than previous projected rate; Carl's June projection was missing previously.	

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



SWEL continues data collection slowed down from 10 - 15 interviews per month through May to 8 - 10 interviews in the months of June and July. 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. SWEL is scheduled to begin phone interviews with mail-in kit option in early August.

#### Data collection / Sample:

Stats: 177 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 Aug 31, 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 Aug 31, 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>Project Team</b>	<b>Period Of Approval:</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>

**Proposal #:** no data

**Description:** The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations.

The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 600 interviews.

**SRO Project Period** 12/2018 - 12/2019

**Data Col Period** 01/2019 - 12/2019

**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> 08/27/2019	<b>DC End:</b> 09/23/2019

**Other Project Team Members:** SSAs: Steven Sonoras, Nancy Walker, Ann Munster  
Programmer: Dave Dybicki, Max Malhotra  
TSG: Pamela Swanson, Tim Wright

**Other Project Names:**

**Sample Mgmt Sys** SMS

**Data Col Tool** Blaise 4.8

**Hardware** Desktop

**DE Software** NA

**QC Recording Tool** DRI-CXM; Live monitoring

**Incentive** Not used

**Administration** NA

**Payment Type** N/A

**Payment Method** N/A

<b>Report Period</b>	July, 2019 (SCA 2019)	<b>Project Phase</b>	Initiation
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**Risk Level** On Track

**Monthly Update** July SCA interviewing was completed on schedule on Monday, July 29th. In July, our telephone data collection staff completed 601 cases (1 beyond goal); 401 RDD and 200 RECON. The overall HPI for July was 3.84.

**Special Issues**

<b>Cost</b> Jul 31, 2019	<i>Total Cost to Date (Direct + Indirect):</i>	75,000.00
	<i>Estimated Cost at Completion (E\$AC):</i>	85,000.00
	<i>Total Budget:</i>	0.00
	<i>Variance (Budget minus E\$AC):</i>	0.00
	<i>Reason For Variance:</i>	

<b>Projections</b> Jul 31, 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>	

<b>Measures</b>	<b>Units Complete</b>		<b>RR</b>	<b>HPI</b>
<i>Current Goal:</i>	600			3.45
<i>Goal at Completion:</i>	600			3.84
<i>Current actual:</i>	601			3.84
<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%; border-collapse: collapse;"> <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>	July, 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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The main focus in July was testing. Two integration tests happened in July. The remaining outstanding items were worked through in July. It was discovered that the new Obs trigger in MSMS doesn't quite work the way expected. We have reverted back to the original design for the launch of the Interviewer Debriefing (obs). We were able to implement a method for the R to receive their debriefing email at the conclusion of their VM interview while the interviewer is completing their debriefing (rather than waiting until the interviewer has completed all of their tasks. Andrew signed-off on the pilot version in TestCurrent (INT8) on July 30 after testing on both desktop and smartphones to check the different designs (look) of the displays. The production environment was set-up at the end of July.

In July interviewers did paired practice shifts to practice the VM interview. Kallan entered the July and August interviewer availability into Calendly.

The VCT team scheduled a project review with SRO admin in July. There was a technical issue that prevented the planned demo. Another review will be scheduled for August to provide (only) a demo (of VM and VS).

The IRB sent a post-approval contingency. We will need to submit an amendment when we receive the MiCDA funding.

It was discovered that the letterhead was printed with the incorrect phone number for the SSL. All communications (letters and postcard) for the for the pilot had been printed. We checked with Aerialink to see if the misprinted number happened to be available and could have a redirect set-up on it to the correct number. After checking with Verizon it was determined that the misprinted number was not available. The letters and postcards were reprinted. The ISR mailroom metered the invitation letters. Any postcards or final reminder letters that complete will be pulled prior to metering and mailing. Postcards for the main study were ordered (since the pilot postcards needed to be reprinted).

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 and prepared three files (\$2, \$20, \$22) with giftcodes for Data Ops. A study account has been created at Amazon to purchase the codes. Andrew, Kallan, and Pooja have access to that account (using the study email address).

Data management continues to take longer than expected. The main data manager was out for a week due to a death in the family. The (quite busy) back-up data manager stepped in while she was away.

Andrew met with Dean to review the cost report and update projections as necessary. After discussions with the SSL (about TL time and shift management) the budget was adjusted with shift management time (5% of interviewing hours) and 50% of interviewer time moved from Survey Tech I to Survey Tech II. Even though there are no TLs on the project, 50% of them are TLs on other projects and that is their rate. Andrew also, noticed that postage was under projected. The projections are now up-to-date. Andrew has had two conversations with Fred about this. We have

decided to see how the pilot goes and making cost decisions based on empirical findings from the pilot.

We used the Home Lab to record a U-M interviewer for a companion study at the New School. The SRO budget paid for the time (\$300). Fred mentioned to Andrew that the New School may want the video re-recorded.

Kallan had the Pls look over the content of the materials one last time before finalizing.

#### Special Issues

##### Cost

Jul 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

Jul 31, 2019

<b>Dollars Projected For Month:</b>	37,549.56
<b>Actual Dollars Used:</b>	31,784.19
<b>Variance (Projected minus Actual):</b>	5,765.37
<b>Reason For Variance:</b>	Some anticipated costs did not hit in July as expected. Those costs were moved to August.

#### Measures

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

#### Other Measures