Survey Research Operations

Monthly Project Report

Sponsored Projects

May 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
(H&WB) Health and Wellbeing in Southeast Michigan
(HID) High Intensity Drinking
(HCDC, H&C) Housing & Children
(HRS - LHMS 2019) HRS Enhancing Retrospective Life History Data 2019
(HRS-Neuro) HRS Neuroimaging Pilot
(MTF Web 2019) Monitoring the Future 2019 web
(NSFG 2010-2020) National Survey of Family Growth
(PSID19 RP) PSID 2019 Roster Pilot
(CDS-19) PSID Child Development Supplement V (2019)
(SWEL) Stress and Wellbeing in Everyday Life
(SCA 2019) Surveys of Consumer Attitudes
(VCT) Video Communication Technologies in Survey Data Collection

Project Name	American Family Health Study (AFHS)		
Project Mode	Primary: Web Secondary: Mail Total of Modes: 3		
Project Type	Sponsored Projects	**Project Status**	Current
Budget	**Direct Budget:** 1,596,238.00 **InDirect Budget:** 893,875.00 **Total Budget:** 2,490,133.00		

Principal Investigator/Client	Brady West (Survey Research Center) William Axinn, Mick Couper and James Wagner (Survey Research Center)

Funding Agency   National Institutes of Health (NIH)

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

Project Team		
Project Lead:	Rebecca Gatward
Budget Analyst:	Dean E Stevens
Production Manager:	Derek Dubuque
Senior Project Advisor:	Grant D Benson
Production Manager:	
Production Manager:	

Proposal #:   no data

Description:

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

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

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

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

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

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

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

o   We will use an external vendor to scan returned paper screeners, rather than manual data entry. This vendor will also format the paper forms, print materials and be responsible for most of the respondent mailings.

o   The original study design did not include web as a mode of data collection for screening. Additional funding from SRC has been obtained by the Principal Investigator to cover the development of a web screener and associated data management and reporting costs.

o   Telephone reminder calls remains one of the steps in the non-response protocol for the main data collection. However, it is likely that this effort will be targeted to a subset of the selected sample, rather than across the entire sample.

o   The amount budgeted for the TOA for the screener was $2 and $5 – 50% of the sample to receive each amount. The TOA amount will now be $2 for the full sample. We may provide an additional TOA of $5 to a subset of the non-responders as part of one of the follow-up reminder mailings (depending on available budget).

o   The eligibility age range for the study has been changed from 15-49 to 18-49. This eliminates the need to contact to parents/guardians of all eligible respondents who have not reached the age of majority to gain consent to participate in the study. There are three states where the age of majority is above 18 years of age – in these states we will adjust the selection protocol as necessary.

o   A further change to the study protocol is around completion of the main modules. In some circumstances we will provide Respondents the option to move directly to complete the main modules after completing the screener without being sent an invite in the mail/email to do so. This will only happen if the selected R is also the person who completed the screener.

o   An experiment around completion of the modules has been introduced to the protocol. Twenty per cent of the

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

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

Milestone Dates

PreProduction Start:	05/03/2019	*Pretest Start:*	
Pretest End:		*Recruitment Start:*	
Staffing Completed:		*GIT Start:*	
SS Train Start:		*SS Train End:*	
DC Start:	09/01/2019	*DC End:*	03/31/2021

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	May, 2019 (AFHS)	**Project Phase**	Planning

Risk Level	*On Track*

Monthly Update
- Initial Project Review/Kick off took place on 5/3/19
- PI group are focused on reviewing NSFG CRQs to determine content for the main questionnaire.
- SRO involvement to date has been mainly project management support, attending and providing input during Research Team meetings and Blaise programming (web screener).
- Firming up survey protocol with Research Team
- SRO Tech Team has begun to meet every other week.

Special Issues
Additional funding (AFHS Supplement) for web screener development provided by SRC - Actuals (4/31) $1,388.74 (total $18,180)

Cost
Apr 30, 2019

Total Cost to Date (Direct + Indirect):	14,005.70
Estimated Cost at Completion (E$AC):	2,297,074.73
Total Budget:	2,490,133.00
Variance (Budget minus E$AC):	193,058.27
Reason For Variance:	Ballpark cost used for printing, mailing and scanning - currently producing a specification for this work to contract out this work to an external vendor. The project was costed based on manual data entry. Scope changes have been extensive so far and will continue - so far these changes have not increased costs (some have decreased costs).

Projections
Apr 30, 2019

Dollars Projected For Month:	11,506.62
Actual Dollars Used:	4,574.79
Variance (Projected minus Actual):	6,931.83
Reason For Variance:	Fewer programmer hours used (needed) in April -

Measures

	Units Complete	RR	HPI
Current Goal:	42,120 screened		NA
Goal at Completion:			
Current actual:	NA		NA
Estimate at Complete:			
Variance:			

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%) .

Project Name	Americans' Changing Lives - Wave 6 (ACL6)
Project Mode	Primary: Telephone Secondary: Face to Face Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 462,919.00 **InDirect Budget:** 259,234.00 **Total Budget:** 722,153.00
Principal Investigator/Client	Margaret Hicken (University of Michigan, SRC - SEH)

Funding Agency   National Institutes of Health, National Institute on Aging

IRB   **HUM#:**   HUM00153243   **Period Of Approval:**   Pending

Project Team   **Project Lead:**   Terri Ann Ridenour
                              Budget Analyst: Grace Tison
                              Production Manager: Lisa J Carn
                              Senior Project Advisor: Shonda R Kruger-Ndiaye
                              Production Manager:
                              Production Manager: 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). Iwers 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 Start:*	
Pretest End:		*Recruitment Start:*	02/25/2019
Staffing Completed:		*GIT Start:*	04/01/2019
SS Train Start:	04/02/2019	*SS Train End:*	04/03/2019
DC Start:	04/23/2019	*DC End:*	08/31/2019

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	May, 2019 (ACL6)	**Project Phase**	Implementing
Risk Level	*Attention!*		

Monthly Update

I've changed the status indicator to "Special Attention Needed" due to significant projected overrun. The following are the main drivers that will be discussed at the upcoming project review meeting (6/7/19):

• Data management tasks, including additional support and coordination with the CST, and preparation of sample for data collection (Note: our data manager was new to SRO, which requires additional mentorship by another data manager in our current support structure; elimination of SRSR and training hours required)

• ACL6 instrument changes have resulted in increased project management hours for updating Blaise/STrak specifications, programming hours for implementing technical solutions and testing

• Home Visit protocol requirements have resulted in increased project management hours for updating Weblog/Blaise/STrak specifications, programming hours for implementing technical solutions and testing (needed mechanism for triggering reminder calls, but grew in scope)

• 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)

• 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)

•   Additional training hours for Survey Tech (Interviewer staff and Team Leaders) due to shifted data collection timeline and decision not to delay training, but to keep skills fresh during post-training downtime

•   Additional delay time (beyond that accommodated in budget supplement) for non-contingent staff (Survey Tech) due to pending IRB approval, Home Visit 3rd party vendor contract establishment

•   Weblog development not budgeted, but essential for Home Visit coordination with 3rd party vendor (ExamOne) biorepository (CLASS Lab) – and follow up reminder calls by SSL team; work for App Programmer and Managers significant

•   Help Desk staff hours in proposal were much less (4 hrs/month) than actually needed

•   Increased sample size projected vs. actual is driving up other costs (e.g. Home Visit incentives)

•   Need to draft and program in STrak follow up workflow for Rs to be initially undecided about home visit

•   QC (Evaluation) was significantly underbudgeted compared to reasonable workplan

•   Expedited postage for home visit packets

Special Issues

Cost
May 22, 2019

Total Cost to Date (Direct + Indirect):	308,823.39
Estimated Cost at Completion (E$AC):	807,070.08
Total Budget:	722,153.00
Variance (Budget minus E$AC):	-84,917.08

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

1) The Core Study Team/PIs continued developing the ACL6 instrument and making edits. These changes and requirements resulted in increased hours for Jaime Koopman, who is updating Blaise/STrak specifications to reflect PI's decisions, our programmers, David Dybicki, Ashwin Dey and Jeff Smith who are implementing technical solutions and Jaime, Andrea and others who are testing systems.

2) Home Visit consent protocol changes (i.e. undecided Rs) and Home Visit protocol requirements for coordination with ExamOne/CLASS Lab have resulted in increased project management hours for updating Weblog/Blaise/STrak specifications, programming hours for implementing technical solutions and testing.

3) 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.

4) There were very minimal hours projected in the initial ACL6 budget for Help Desk staff (40 hours total). As a result, we've exceeded this budget. Andrea Pierce has been essential for: testing systems, releasing updates and supporting users.

5) Data management tasks, including additional support and coordination with the CST, and preparation of sample for data collection. Data management hours and new employee training/development for Stephanie Windisch, in addition to effort from Chris Greene, the senior data manager serving as mentor and overseeing her work.

6) Field Operations rate increase (from $3.21/hour to $3.41/hour) and Field Hiring & Training rate increase (from $1.10 to $1.39) effective December 2018.

We will see an increase in charges in April-May as we trained staff and transitioned to data collection, however, we believe we've adequately reflected this in projections. We will continue to monitor & control other direct expense categories (i.e. programming and project management salaries).

Shonda, the project SPA, and Grace, our Financial Analyst, and I have a budget meeting scheduled with the PI (Maggie) and Grants Manager (Nick) on May 9. We plan to discuss the budget and walk through the latest client cost report. We also plan to discuss options to reduce scope in an attempt to remain within budget.

Projections
May 22, 2019

Dollars Projected For Month:	66,960.34
Actual Dollars Used:	55,371.22
Variance (Projected minus Actual):	11,589.12
Reason For Variance:	

Measures

	Units Complete	RR	HPI
Current Goal:	1,220 (1,526 sample)	80%	5
Goal at Completion:			
Current actual:	247	17%	4.67
Estimate at Complete:			
Variance:			

Other Measures

Project Name	Army Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study (A-STARRS LS)
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 3

Project Type	Sponsored Projects	**Project Status**	Current

Budget   *Direct Budget:*   8,280,054.00   *InDirect Budget:*   4,554,645.00   *Total Budget:*   12,834,699.00

Principal Investigator/Client
James Wagner (University of Michigan)
Robert Ursano (Uniformed Services University of the Health Scienc)
Murray Stein (University of California San Diego)

Funding Agency   Department of Defense

IRB   *HUM#:*   HUM00099203   *Period Of Approval:*   2/18/2016-2/17/2017

Project Team   *Project Lead:*   Meredith A House
                     Budget Analyst: William Lokers
                     Production Manager: Ruth B Philippou
                     Senior Project Advisor: Mary P Maher
                     Production Manager: Juan Carlos Donoso
                     Production Manager: Leah Marie Roberts

Proposal #:   no data

Description: 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 form 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.

SRO Project Period   02/2015 - 11/2019
Data Col Period   10/2015 - 11/2019
Security Plan   NA

Milestone Dates

PreProduction Start: 02/01/2015		*Pretest Start:* 10/14/2015	
Pretest End: 03/31/2016		*Recruitment Start:*	
Staffing Completed:		*GIT Start:*	
SS Train Start:		*SS Train End:*	
DC Start: 09/12/2016		*DC End:* 09/30/2019	

Other Project Team Members: 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

Other Project Names:

Sample Mgmt Sys   MSMS
Data Col Tool   Blaise 5
Hardware   Desktop
DE Software   N/A
QC Recording Tool   Live monitoring
Incentive   Yes, R
    Administration SRO Group
    Payment Type   Check, post ($50-$100); Cash, prepaid ($2 (or Challenge coin)); Other (Army STARRS challenge coin (provide
    Payment Method Check through other system (MSMS); Imprest Cash Fund from ISR Business Office (MSMS); Other (Army STA

Report Period	May, 2019 (A-STARRS LS)	**Project Phase**	Initiation

Risk Level   *Not Rated*

Monthly Update
☐   We have collected 12,018 Wave 2 main study interviews and 180 end game interviews as of May 29.
☐   The draft sub-award agreement for the Year 5 extension (supplemental funding) was reviewed by the U-M Office of Research and Sponsored Projects (ORSP). ORSP made some revisions and sent it back to HJF for their review.
☐   There was no U-M IRB activity this month.

☐ We provided documentation and information to the PIs and the ODUSA, including Wave 3 timeline information, production numbers and rates for the IPR slides, and consent language and email text for Donation of Postmortem Brain Tissue and Additional Biospecimens.

☐ We continued to support the efforts to obtain a HIPAA "Waiver and Altered Authorization Application" so that STARRS can obtain a new data sharing agreement and continue receiving MDR and other health-related data from the Army.

☐ We continued to monitor progress on the Data Use Agreement for U-M to receive NDI data from the Centers for Disease control. So far, we have signatures from Harvard, HJF and U-M. We are waiting for signatures from UCSD and USUHS.

☐ We continued work on creating and quality control checking the datasets for PPDS T0, T1, T2 and T3, and STARRS-LSW1 public use deliverables.

☐ Enclave user support continued. One person has yet to complete his annual training renewal, which were due to U-M January 31, 2019.

☐ We made good progress on biomarker group requests for assistance. Transfer of data for two requests was completed and the transfer memo for a third request was written and approved by the PIs.

☐ We continued work on the transfer of encrypted test construct files from AAG to U-M, now using DataLocker (sent via FedEx) for the transfer instead of SFTP.

☐ We started developing a process for extending data transfer memo dates for 'data destruction' to a later date.

☐ The NSS neurocognitive test scores released to ICPSR for restricted public data use (Dec 2018) were added to the enclave's SQL database.

Activities for May 2019 include:

Project Management and Planning:

☐ We continued Wave 2 production data collection through the month. We sent weekly production updates to the PIs, and reported on progress on the call with the Army/ODUSA.

☐ We continued meeting with the ODUSA to coordinate Safety Plan and address lookup activities. We continued to wait for decisions from the GSC on what they want to do with the NIOSH address updates when they are made available to the project.

☐ We continued to respond to requests for documentation and information from PIs and the ODUSA as needed.

o We confirmed for USUHS information regarding a possible Wave 3 timeline. This information was needed by the ODUSA to create a Wave 3 plan for consideration by the GSC.

o We provided USUHS with Wave 1 and Wave 2 production numbers and rates for the STARRS-LS IPR slides.

o We provided USUHS with the most current IRB-approved version of the consent language and email text for Donation of Postmortem Brain Tissue and Additional Biospecimens, which was requested by ODUSA for sharing with the Millennium Cohort Study.

o We continued to provide support in the process of submitting a HIPAA "Waiver and Altered Authorization Application" so that STARRS can obtain a new data sharing agreement and continue receiving MDR and other health-related data from the Army. The USUHS IRB POC and the U-M IRB director spoke and confirmed that the U-M IRB can approve HIPAA waivers. Currently, the DHA privacy board director is reviewing the waiver application before it is signed and then sent to U-M IRB for approval.

o We continued looking into what is involved in developing and implementing the HIPAA authorization process for a Wave 3.

o We continued to monitor progress on the Data Use Agreement for the USUHS request to send National Death Index (NDI) data to Michigan through the Joint DoD/VA Suicide Data Repository (SDR). USUHS is working on this with the VA.

o We continued to monitor progress on the Data Use Agreement for U-M to receive NDI data from the Centers for Disease control. So far, we have signatures from Harvard, HJF and U-M. We are waiting for signatures from UCSD and USUHS.

o We received a copy of AAG's "Shred-All Policy" Destruction memo. We had requested their SOP for data storage/destruction to help inform our procedures on NDI data handling/destruction. The Shred-All memo is not exactly what we were hoping to receive, but we are grateful for their consideration and willingness to share the memo with us.

☐ The draft sub-award agreement for the Year 5 extension (supplemental funding) was reviewed by the U-M Office of Research and Sponsored Projects (ORSP). ORSP made some revisions to bring the agreement into harmony with the regulations and policies applicable to the University as a public institution and to align with the previous agreements between U-M and HJF. The revised version is currently under review at HJF.

☐ There was no U-M IRB activity in the past month.

Enclave and User Support:

☐ Standard Enclave activities continued. These include maintaining security requirements; processing background check and Flux user access requests, drop box requests, ID swap and data transfer requests; managing software acquisition and updates; and providing user support as needed.

☐ We made good progress on biomarker group requests for assistance. Transfer of data for two requests was completed and the transfer memo for a third request was written and approved by the PIs.

☐ We continued to follow up with one individual who did not complete his annual training renewal by the due date of

January 31, 2019. As of the end of May, this individual remains incomplete. This individual's access to the Enclave has expired and will not be renewed until the annual training has been completed.

□   We continued to work on updates and improvements to the onboarding / annual training materials. The updated materials will be used for the first time in early June.

□   We continued to work on moving users to two-factor authentication (using the DUO security system). We are now checking to see that the few remaining users who require the switch have successfully enrolled in DUO.

□   We worked on obtaining official quotes for Enclave hardware/software upgrades: new/increased Linux storage, new networking switch, and firewall upgrade.

□   We continued with the second stage of data removal for respondents who have withdrawn from the study, removing data from various groups of files in the consent enclave (pieces that are not visible to anyone outside U-M).

□   Given the difficulties encountered in transferring the set of encrypted test construct files, AAG elected to transfer them via encrypted DataLocker (sent via FedEx) instead. We worked with Gretchen and AAG on the logistics. We received the DataLocker with the test construct files and began the work to decrypt them. We sent the DataLocker back to AAG for the next transfer, which will contain real construct files.

□   To re-establish a more formal process for transferring files from the U-M Enclave to AAG (which happens infrequently), we drafted protocol steps and sent them to Gretchen and AAG for their review and additions.

□   We started developing a process for extending data transfer memo dates for 'data destruction' to a later date. We are working closely with USUHS on this process and to obtain the extension date.

□   The NSS neurocognitive test scores that were released to ICPSR for restricted public data use (Dec, 2018) were added to the enclave's SQL database. The metadata and codebook were updated as well.

Public Use Data:
□   For both PPDS and STARRS-LS Wave 1:
o   We continued work on creating and quality control checking the datasets for PPDS T0, T1, T2 and T3, and STARRS-LSW1.

Data Collection Progress and Plans:
□   Wave 2 production statistics as of May 29 are as follows:
o   Replicates released: 1-14 out of 14 with a total of 14,522 sample lines
o   Completed main interviews: 12,018 (10,624 web, 1,394 telephone)
o   Completed 180 end game interviews (144 web, 36 telephone)
o   Our response rates remain stable; there is no change to the projected number of completed interviews for Wave 2.
o   We have been implementing the respondent verification protocol since 4/29.
□   The production team developed a protocol for handling respondents who fail to verify based on their name or year of birth.
□   So far, six respondents have failed the verification protocol. Five cases have been resolved and one is pending.
o   Chaplain Safety Plan activities:
□   On 4/24, we received IRB approval from USUHS for the STARRS-LS safety protocol amendment. Since then, three respondents who triggered the safety protocol were identified with the IRR status. The Michigan CCP team followed up appropriately.

Special Issues
We continue to track areas of risk, and develop mitigation strategies.
□   Enclave Support
o   We continue to monitor priorities for Enclave support. We balance the primary Enclave support work with a number of more complex biomarker data support requests, which are outside of the reduced Enclave team scope in the STARRS-LS contract. We prioritize the primary work above other requests in accordance with project goals and to remain within budget/scope. As a result, the biomarker data support requests can take longer to service. As long as requestors are ok with this arrangement, we can continue to manage the work and priorities in this fashion.
□   New technical systems
o   We continue to work with the development team for our sample management system, and prioritize our requests. The efficiency of our technical systems continues to be strong, but as sample sizes grow, we are working with the technical team to identify improvements, should these larger sample sizes lead to significant slowdowns in system functioning.
□   Scope additions
o   Knowing that it is almost certain 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. 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
May 31, 2019

Total Cost to Date (Direct + Indirect):	11,510,286.12
Estimated Cost at Completion (E$AC):	12,781,353.82
Total Budget:	12,834,699.00
Variance (Budget minus E$AC):	53,345.18
Reason For Variance:	We are currently projecting an overall project surplus of $53,345, an increase of $515 from last month's report. Overall savings result from continued efficiencies and refinements in projections. In addition, with only 2 months of interviewing remaining, we feel comfortable projecting a less conservative number of interviewer hours (i.e. we are now projecting fewer hours) needed to complete Wave 2.

Projections
May 31, 2019

Dollars Projected For Month:	297,683.61
Actual Dollars Used:	260,203.23
Variance (Projected minus Actual):	37,480.38
Reason For Variance:	Salaries, less money than projected for respondents and indirect costs.

Measures

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

Other Measures

Project Name	Baby's First Years (BFY)
Project Mode	Primary: Face to Face Total of Modes: 1
Project Type	Sponsored Projects

Project Status Current

Budget	**Direct Budget:**	3,786,038.00	**InDirect Budget:**	1,742,658.00	**Total Budget:**	5,528,696.00

Principal Investigator/Client
Dr. Greg Duncan (University of California - Irvine)
Dr. Kimberly Noble (Teachers College Columbia University)
Dr. Katherine Magnuson (University of Wisconsin)

Funding Agency
National Institute of Child Health and Human Development (NICHD)

IRB   **HUM#:**   HUM00137963   **Period Of Approval:**

Project Team
Project Lead:	Piotr Dworak
Budget Analyst:	Janelle P Cramer
Production Manager:	Barbara Aghababian-Homburg
Senior Project Advisor:	Stephanie A Chardoul
Production Manager:	Margaret Lavanger
Production Manager:	Anthony Romanowski

Proposal #:   no data

Description:

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.

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.

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).

SRO will be responsible for four interactions with the selected mothers/infants:
•   Baseline will occur immediately (within 24-48 hours) after birth, in the hospital;
•   Wave 1 will be a telephone interview with the mother when the child is 12 months old;
•   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;
•   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.

Each data collection phase/wave will be a full 12 months, with Baseline starting in April 2018:

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

SRO Project Period   10/2017 - 12/2020
Data Col Period   04/2018 - 12/2020
Security Plan   NA

Milestone Dates

PreProduction Start:	10/01/2017	*Pretest Start:*	
Pretest End:		*Recruitment Start:*	01/01/2018
Staffing Completed:	02/07/2018	*GIT Start:*	03/19/2018
SS Train Start:	03/20/2018	*SS Train End:*	03/22/2018
DC Start:	05/07/2018	*DC End:*	05/31/2019

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)

Other Project Names: HHICD Household Income and Childhood Development

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 May, 2019 (BFY) **Project Phase** Implementing

Risk Level *On Track*

Monthly Update Project updates:
BFY recruitment is projected to end on time and to reach the goal of 1,000 recruited Moms split exactly into 400 in the experimental and 600 in the control condition.   Age 1 training is scheduled for June 18th (GIT) and June 19 - 23 (SS), followed by on-site training on EEG procedures (including home visits).   Age 1 preparations are on track and risk areas are currently being addressed. Current risk areas include Windows 10 laptop configuration, delayed integration testing of the data collection systems. We are close to receiving Age 1 approval from TCCU IRB and are working on submission to NYSPI (NY).

Data collection / Sample:
Final goals by site have been re-adjusted to reach 1,000 recruited participants despite slower pace in MN.

	Goal	Recruited	
Overall	1000	982	+/-
Nebraska	295	295	0
New York	286	277	-9
Minnesota	124	118	-6
Louisiana	295	292	-3

Staffing:
Age 1 Staffing:
NE: 4 iwers staffed (all NH, 2 with BFY Recruiting experience)
MN: 1 NH
NY: 3OS, 1NH
NOLA: 2 NH and 1 OS
Travelers: 3 (OS, one with shared responsibilty as a locator)"

Technical system:
Windows 10 laptop configuration is currently adressed to move forward with Age 1 integration testing.

Finances:
Current budget is being revised to include revised interviewer time, training and cost projections.

Special Issues

Cost
May 12, 2019

Total Cost to Date (Direct + Indirect):	1,751,369.04
Estimated Cost at Completion (E$AC):	6,178,421.96
Total Budget:	5,528,696.00
Variance (Budget minus E$AC):	-50,723.96
Reason For Variance:	New budget with Age 1 supplement is: $6,127,698.00. Variance with the new budget: ($50,723.96)

Projections
May 12, 2019

Dollars Projected For Month:	102,188.26
Actual Dollars Used:	104,034.71
Variance (Projected minus Actual):	-1,846.45
Reason For Variance:	

Measures

	Units Complete	RR	HPI
Current Goal:	982	—	7
Goal at Completion:	1000	—	7
Current actual:	982	—	8.3
Estimate at Complete:	1000	—	8.3
Variance:			

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 | **HUM#:** | **Period Of Approval:**

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

Other Project Team Members:	Donnalee Grey-Farquharson, Kathy LaDronka, William Lokers, Parina Kamdar

Other Project Names:

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

--- --- --- --- --- --- --- --- --- --- --- --- ---

Report Period	May, 2019 (C.A.R.E.)	**Project Phase**	Planning
Risk Level	*Not Rated*		

Monthly Update

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 lst 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

Cost
Apr 30, 2019

Total Cost to Date (Direct + Indirect):	65,861.85
Estimated Cost at Completion (E$AC):	897,737.59
Total Budget:	1,034,833.00
Variance (Budget minus E$AC):	137,094.41
Reason For Variance:	01/2019 Programming and data management work that was budgeted is no longer a part of SRO's scope.

Projections
Apr 30, 2019

Dollars Projected For Month:	19,867.14
Actual Dollars Used:	12,867.41
Variance (Projected minus Actual):	6,999.73

Reason For Variance: 03/2019
Projections to be updated/moved forward to reflect start production start date

02/2019
Production and some associated activities delayed. Projections have been adjusted moving forward.

Measures

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

Other Measures

Project Name	Emergency Department Study to Assess Risk of Suicide - Continuation Project (ED-Stars Continuation)
Project Mode	Primary: Telephone Total of Modes: 1
Project Type	Sponsored Projects

Project Status   Current

Budget	***Direct Budget:*** 341,436.00	***InDirect Budget:*** 187,848.00	***Total Budget:*** 529,284.00

Principal Investigator/Client
Cheryl King, Ph.D., ABPP (University of Michigan)
Jacqueline Grupp-Phelan, M.D., MPH (Children's Hospital Medical Center, l
David A. Brent, M.D. (University of Pittsburgh Medical Center)

Funding Agency   National Institute of Mental Health (NIMH)

IRB   ***HUM#:***   HUM00134293   ***Period Of Approval:***   7/31/2017-7/30/2018

Project Team
Project Lead: Maureen Joan O'Brien
Budget Analyst: Janelle P Cramer
Production Manager: Lisa J Carn
Senior Project Advisor: Kirsten Haakan Alcser
Production Manager: Maryam N Buageila
Production Manager:

Proposal #:   no data

Description: 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.

SRO Project Period	01/2018 - 12/2020
Data Col Period	01/2019 - 09/2019
Security Plan	NA
Milestone Dates	

PreProduction Start: 10/15/2017		***Pretest Start:***	
Pretest End:		***Recruitment Start:*** 11/01/2017	
Staffing Completed:		***GIT Start:***	
SS Train Start: 01/22/2018		***SS Train End:*** 01/23/2018	
DC Start: 01/24/2018		***DC End:*** 09/30/2019	

Other Project Team Members:	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.
Other Project Names:	Continuation, Warning Signs, ED-Stars Continuation,
Sample Mgmt Sys	SMS
Data Col Tool	Blaise 4.8
Hardware	Desktop
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, Other (Amazon gift card)
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	May, 2019 (ED-Stars Continuation) **Project Phase** Implementing
Risk Level	*Not Rated*

Monthly Update   Currently 117 Case interviews and 268 Control interviews have been completed, for a total of 385 completed interviews. We have been delivered 131 unique cases (first attempters) and have completed 93. Overall RR is 81% for closed cases. Controls continue to have a higher RR than Cases (85% for Controls and 74% for Cases). We are not sure of the reason, but it seems that Cases are more difficult to reach possibly due to current stressors in their lives. 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. We had been steadily receiving 12 controls delivered per week and were informed by the Data Collection Center (DCC) on Friday, April 5th that they had caught up with the backlog of controls and would send only up to 5 controls per week.   We have seen a drastic drop in the number of controls delivered. In the month of April, we received only 23 controls. By the end of May, we will only have received 4 for the whole month. Additionally, we have been receiving less new cases each week since less have been attempting suicide. We are considering the effect of this on production, scheduling, and budget. The PI has reported that controls will only be matched with 'unique' cases, and cases who have attempted more than one time will not be matched with controls. In addition, she has stated that the aim is to keep the ratio of controls to cases at 3:1, but they recognize they will not be able to match that many since the sample pool started at 1092 and has reduced (117 cases and 10 controls have been coded as non-sample-PI does not want to release them back into sample pool, plus once sample becomes a case, they cannot be a control – 117 cases complete). Additionally, the matching criteria are conservative. PI's do not wish to loosen matching criteria at this point.   This month, due to reduced sample to work, the PI agreed to reduce 24 hour call attempt turn-around time to "as soon as possible after the attempt", which is what the IRB approved. This means that there does not need to be 7 day a week coverage in the SSL. Starting June 1, interviewers will work shifts only 5 days per week, 1.5 hour shifts. One of those days will be worked by the postdoc. The 4 Phase 1 interviewers and the post-doc have not yet advanced to Phase II. Since there is limited sample to work, they are not getting the practice or experience needed to advance. Iwer practice sessions are continuing with the Co-PI, and the SSL PM is disseminating information gleaned from these practice sessions to all Iwers. Phase 1 Iwers meet with the PI for 2 hours and Phase 2 interviewers have reduced their meeting time to 1 hour bi-monthly.   QC staff is attending the feedback sessions.   Due to lowered sample delivery and reduced staffing, current funds will carry us longer into 2020 than had been anticipated. Currently, funds will carry us through mid-March. This will continue to be evaluated as scheduling and sample delivery levels out.

Special Issues

Cost
May 31, 2019

Total Cost to Date (Direct + Indirect):	449,419.91
Estimated Cost at Completion (E$AC):	630,197.75
Total Budget:	529,284.00
Variance (Budget minus E$AC):	10,223.25
Reason For Variance:	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
May 31, 2019

Dollars Projected For Month:	24,953.74
Actual Dollars Used:	20,448.51
Variance (Projected minus Actual):	4,505.23
Reason For Variance:	Variance is due to high training and production costs. During previous months, costs had been spread across 2 projects and now all costs are charged to Warning Signs only as ED-Stars is over. We expect costs to even out as new iwers become more efficient and are able to focus on production more.

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:	1800		
Current actual:	385	81	2.82
Estimate at Complete:			
Variance:			

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:** 294,340.00 **InDirect Budget:** 164,829.00 **Total Budget:** 459,169.00
Principal Investigator/Client	Nigel Paneth (Michigan State University) Michael Elliot (University of Michigan)

Funding Agency   NIH

IRB   **HUM#:**   HUM00139050   **Period Of Approval:**   12/6/2017-12/5/2018

Project Team

Project Lead:	Terri Ann Ridenour
Budget Analyst:	William Lokers
Production Manager:	
Senior Project Advisor:	Evanthia Leissou
Production Manager:	Ian Ogden
Production Manager:	Sharon K Parker

Proposal #:   no data

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

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

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

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

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

SRO's involvement in data collection will start 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 all three cohorts will be assessed using standardized developmental assessments at age 2, 4, and 6 years old. The assessments will be done during in-home visits. SRO will start interviews and assessments of children from the ARCH and MMIP cohorts in 2018.

SRO Project Period   01/2017 - 12/2020

Data Col Period   05/2018 - 12/2020

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:	Ian Ogden: Project Manager
	Parina Kamdar: Financial Analyst
	Gregg Peterson: Senior Technical Advisor
	Jeff Smith: Technical Lead
	Brad Goodwin: Data Manager
	Jeff Smith: Systems Programmer
	Ashwin Dey: Systems Programmer
	Hueichun Peng: CAI Programmer-Illume
	Jim Hagerman: CAI Programmer-Blaise
	Deb Wilson: Help Desk
Other Project Names:	
Sample Mgmt Sys	SurveyTrak; Illume
Data Col Tool	Blaise 4.8; Illume
Hardware	Laptop; Tablet; [UM cell] Phone; Paper and Pencil
DE Software	N/A
QC Recording Tool	Camtasia
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post ($100)
Payment Method	Check through STrak RPay System

Report Period	May, 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. The next hospitals to come onboard are in Saginaw, Dearborn, Grand Rapids and Port Huron. No dates yet have been set for recruitment in these hospitals. To date, 660 women have been recruited. Among those cases, 570 are still eligible and active in the study.

[Phase 2: 3-Month Data Collection]
    Babies born: 422
    3-month sample released: 349
    3-Month Interviews Completed: 208
    Production HPI: 3.22
    Average Attempts / Iw: 6.67
    Iw length: 31.31
    Iw 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
Apr 30, 2019

Total Cost to Date (Direct + Indirect):	246,858.00
Estimated Cost at Completion (E$AC):	458,483.81
Total Budget:	459,169.00
Variance (Budget minus E$AC):	685.19

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 Elliot) and subsequently to the study office.

-In February, a budget was submitted to the study office to cover the overrun projected. This budget includes 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. We are planning to meet to discuss next steps once May business closes. As soon as MSU gets the updated request from SRO, they will move it forward to their awards section to process.

Projections
Apr 30, 2019

Dollars Projected For Month:	46,210.69
Actual Dollars Used:	34,927.10
Variance (Projected minus Actual):	11,283.59
Reason For Variance:	

Measures

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

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)
Mr. Alex Nawar (Y Combinator Research)

Funding Agency

IRB   ***HUM#:***   HUM00145626   ***Period Of Approval:***

Project Team   ***Project Lead:***
Budget Analyst:
Production Manager: Barbara Aghababian-Homburg
Senior Project Advisor: Kirsten Haakan Alcser
Production Manager: Donnalee Ann Grey-Farquharson
Production Manager: Carl S Remmert

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 YRC, 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)

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

Report Period	May, 2019 (EDCPE)	**Project Phase**	Implementing

Risk Level   *Not Rated*

Monthly Update

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.

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.

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.

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.

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

03/2019
Training date of July to be confirmed by April 1st by client. Currently continuing work is being done on Blaise instrument.

02/2019
SRO has received some instrument edits from MEM staff and have started to edit the spec document. Training is being further delayed and the earliest we will train is mid-late July. MEM staff has promised to have final selection of Census tracts to SRO by April 5th, 2019.

01/2019
Final survey edits from study staff promised by Feb 1st. Full modules will NOT be cut but groups of questions are going to be cut. Cog iws will be shorter. Risk pref questions -- these may shift to the data cubed app (most likely going with this). YCR would like to move in the consent to Admin Data - if R has said Yes to this, they will be OKAY to skip the Expenditures/Consumption section.   We are assuming we are able to implement this. Actual census tracts -- coming soon, we will take this into account in cost modeling.

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

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

 No April training. Will know in a week or two about how much of a further delay there will. Late July or later is the most likely. There may be cost impacts on this decision. This is a shift back of the field period. They would still want

the same length of field period. But would like the end of field period to be before the beginning of a quarter. SRO will still continue on schedule to get everything ready and will get back to YCR about costs.

12/2018
Pilot data collection complete. Data has been delivered. Interviewer materials are being returned. The Study Team has informed SRO that there will be at least a one month delay to the main launch while they ensure that payments to respondents will not affect their (respondents) social benefits. There are changes to payment methods which will need to be programmed in Strak. Changes to questionnaire will not be decided until late January so Blaise spec'ing and programming will be delayed from scheduled dates. However, Study Staff has said that they expect deletions and no additions to the instruments.

11/2018
Pilot Data collection is almost complete, we have a few English speaking cases scheduled for late November after Thanksgiving but data collection will wrap up soon after. To date there have been no Spanish cases although we have one scheduled for Dec 1st. YCR will try to find some Spanish speakers to complete the survey for informational purposes only, no Raven's, Arrow Flanker, or Hearts and Flowers will be completed - the data will not be saved and the participants will receive a one time payment.

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

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

10/2018
86/150 cases have been successfully screened. Of those, 49 Interviews have been completed, 20 have appts. one was a no show, 6 are resistant, and we are still to schedule 10 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 amendments - mostly centered around cell phone use and user agreement and debit card payments. PIs/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 PIs as well as by PI request to delay a further week so they can be present.

PIs 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 fo 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 speccing will start early June.

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

Cost
Apr 30, 2019

Total Cost to Date (Direct + Indirect):	424,074.05
Estimated Cost at Completion (E$AC):	2,141,179.28
Total Budget:	1,963,818.00
Variance (Budget minus E$AC):	-177,361.28
Reason For Variance:	05/2019

There is a budget overrun due to violation of various assumptions on which the budget was based eg. interview length, production locations, hosting rates, extensive changes to the questionnaire. The EDC team has been notified about a ~80% of the over-run.
01/2019
Production delay has negative impact on cost. management hours have greatly increased.
11/2018
The Pilot revealed - HPI higher than predicted, increased training length for main.
09/2018
Training was longer than budgeted, Interview longer than proposed
08/2018
Clients have made some requests that are not a part of the original proposal - we have projected this so we can have an accurate reflection of cost when we talk to the PIs.
07/2018
Not all costs have been fully projected at this time.
06/2018
Account and shortcodes were not set up in time for May payroll. May charges will be reflected in the June payroll.

Projections
Apr 30, 2019

Dollars Projected For Month:	12,078.13
Actual Dollars Used:	13,285.80
Variance (Projected minus Actual):	-1,207.67
Reason For Variance:	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	
Current Goal:				
Goal at Completion:				
Current actual:				
Estimate at Complete:				
Variance:				

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:* 0.00 *InDirect Budget:* 0.00 *Total Budget:* 16,916,872.00
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	

PreProduction Start:	01/01/2018	*Pretest Start:*	02/02/2018
Pretest End:	02/10/2018	*Recruitment Start:*	
Staffing Completed:		*GIT Start:*	04/07/2018
SS Train Start:	04/09/2018	*SS Train End:*	04/14/2018
DC Start:	04/19/2018	*DC End:*	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	May, 2019 (HRS 2018) **Project Phase** Implementing
Risk Level	*Some Concerns*
Monthly Update	The project team has been working on 2018 production monitoring, implementing end game strategies, 2019 EGenX pre-production, and 2020 pre-production. 2018 data collection is scheduled to end June 1, 2019.
	EGenX data collection is scheduled to start June 17, 2019 with approximately 40 interviewers. Cost to complete is estimated at $879,422.15 which is within the approved ballpark ($790,200-$918,300).

Special Issues

Cost
Apr 30, 2019

Total Cost to Date (Direct + Indirect):	17,492,007.73
Estimated Cost at Completion (E$AC):	18,038,501.32
Total Budget:	16,916,872.00
Variance (Budget minus E$AC):	-1,121,629.32
Reason For Variance:	We estimate approximately 26,000 interviewer hours over the budgeted amount will be required (due to the high HPI) in order to attain the target number of completed interviews. The estimated overrun is $1.2 million.

Projections
Apr 30, 2019

Dollars Projected For Month:	8,727.18
Actual Dollars Used:	8,805.89
Variance (Projected minus Actual):	-78.71
Reason For Variance:	Actual hours came within 3.74 hours of projected.

Measures

	Units Complete	RR	HPI
Current Goal:	19,012	77%	8.9
Goal at Completion:	19,012	77%	8.0
Current actual:	18,085*	73%	8.7
Estimate at Complete:	18,111	74%	8.9
Variance:	-901	-3%	0.9

Other Measures   *Including web interviews (1,797 completed so far)

Project Name	Health and Wellbeing in Southeast Michigan (H&WB)
Project Mode	Primary: Face to Face Total of Modes: 1
Project Type	Sponsored Projects

Project Status Current

Budget	**Direct Budget:** 1,375,508.00 **InDirect Budget:** 770,285.00 **Total Budget:** 2,145,793.00
Principal Investigator/Client	Kristine Ajrouch (Life Course Development Program, SRC) Toni Antonucchi (Life Course Development Program, SRC) Laura Zahodne (Life Course Development Program, SRC)
Funding Agency	
IRB	**HUM#:** HUM00146040 **Period Of Approval:** 4/9/2020
Project Team	**Project Lead:** Heidi Marie Guyer **Budget Analyst:** Parina Kamdar **Production Manager:** Theresa Camelo **Senior Project Advisor:** Kirsten Haakan Alcser **Production Manager:** Ian Ogden **Production Manager:** Lisa Van Havermaet
Proposal #:	no data
Description:	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.
SRO Project Period	05/2019 - 08/2020
Data Col Period	11/2019 - 07/2020
Security Plan	No
Milestone Dates	

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

Other Project Team Members:	Taghreid Lovell, Becky Scherr, Kallan Larsen, Dan Zahs, Pam Swanson, Dave Dybicki, Ashwin Dey, Brad Goodwin, John Gawlas, Paul Burton
Other Project Names:	Alzheimer's Disease Risk and Ethnic Factors: The Case of Arab Americans
Sample Mgmt Sys	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop; [UM cell] Phone; Paper and Pencil
DE Software	Other (Weblog possibly)
QC Recording Tool	DRI-CARI; Camtasia
Incentive	Yes, R; Yes, INF
Administration	SRO Group
Payment Type	Cash, prepaid ($60, $15)
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)

--- --- --- --- --- --- --- ---

Report Period	May, 2019 (H&WB)

Project Phase   Initiation

Risk Level	**Not Rated**
Monthly Update	May was a busy month for the H&WB project. Weekly project management team and tech team meetings began this month as well as biweekly meetings with the PIs. Core project management activities that took place included finalizing the project charter and holding both the first project review meeting as well as the project kick off meeting. Additionally, a project schedule was developed and training dates were set. We investigated several options for certifying interviewers for fluency in Arabic and chose a method that will both result in lower costs while also utilizing our SRO standard language certification process currently used to certify Spanish-speaking bilingual interviewers, to Arabic. A list of materials and order dates has been established taking into account the physical measures equipment as well as the cognitive tests.

Special Issues

Cost
May 31, 2019

Total Cost to Date (Direct + Indirect):	12,370.76
Estimated Cost at Completion (E$AC):	2,145,793.00
Total Budget:	2,145,793.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	Costs may increase due to work scope changes including increased days of interviewer training and increased interview components and length.

Projections
May 31, 2019

Dollars Projected For Month:	12,370.76
Actual Dollars Used:	12,370.76
Variance (Projected minus Actual):	0.00
Reason For Variance:	

Measures

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

Other Measures

Project Name	High Intensity Drinking (HID)
Project Mode	Primary: Web Total of Modes: 1
Project Type	Sponsored Projects

Project Status Current

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	

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:	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	May, 2019 (HID)	**Project Phase**	Implementing

Risk Level   *Not Rated*

Monthly Update   We launched!

It was a tumultuous month for the HID project. What was a fairly straightforward IRB amendment was only approved on Thursday, May 23, which allowed the project team to send out letters the next day. Given that it was Memorial Day weekend, we delayed the combined email and text messages to Wednesday (to allow an extra day for the mail to

arrive since no mail delivery on Monday).

Another issue delaying our start was around the incentive payment method of using the 'Tango' card. This respondent payment is very similar to using an Amazon gift card, except that Tango allows you to apply the incentive amount to a host of electronic gift cards. SRC finance rejected the use of the Tango card which meant the peroject team had two options: 1) eleiminate the use of a Tango card as a payment option (which then required the removal of all references to the Tango card in respondent letters, email, survey) or 2) find another way to make the Tango payments. Ultimately, the Tango payments are now being handled by the Univ of Minnesota.

I've also brought Gary Hein into more of the day-to-day project activities to give him project experience.

Special Issues

Cost
May 31, 2019

Total Cost to Date (Direct + Indirect):	49,385.43
Estimated Cost at Completion (E$AC):	346,067.20
Total Budget:	568,982.00
Variance (Budget minus E$AC):	222,914.80
Reason For Variance:	This is a 4 wave project and we have not yet projected costs for Waves 2-4. However, our scope has been significantly reduced as the project team is handling much of the day-to-day respondent activity.

Projections
May 31, 2019

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

Measures

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

Other Measures

Project Name	Housing & Children (HCDC, H&C)
Project Mode	Primary: Face to Face Total of Modes: 1

Project Type	Sponsored Projects	**Project Status**	Current

Budget	*Direct Budget:*	9,647,688.00	*InDirect Budget:*	2,195,370.00	*Total Budget:* 11,843,058.00

Principal Investigator/Client

Funding Agency

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

Project Team
Project Lead: Barbara Lohr Ward
Budget Analyst: Parina Kamdar
Production Manager: Veronica Connors-Burge
Senior Project Advisor: Grant D Benson
Production Manager: Becky Kay Scherr
Production Manager: 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: 04/01/2016	*Pretest Start:* 10/24/2016
Pretest End: 12/31/2016	*Recruitment Start:* 06/01/2016
Staffing Completed: 05/02/2017	*GIT Start:* 04/30/2017
SS Train Start: 05/10/2017	*SS Train End:* 05/18/2017
DC Start: 05/22/2017	*DC End:* 05/23/2018

Other Project Team Members:

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

- -

Report Period	May, 2019 (HCDC, H&C)	**Project Phase**	Implementing
Risk Level	*Some Concerns*		

Monthly Update

During May 2019, SRC activities included the following:

Task 1: Management, Budget and Work Plan
% Task Spent to Date
- Participated in monthly project meeting with research team to discuss scope, cost projections and schedule.
- Reviewed/monitored project expenses. Revised and adjusted monthly projections. Prepared month-by-month, task-by-task spending report.
- Monitored subcontracts and invoicing instructions. Worked with financial staff at Johns Hopkins to revise contract, manage invoices, and triage issues with late invoice payments.
- Revised and resubmitted past invoices to utilize expiring grant.
- Completed and delivered line-by-line reconciliation of dried blood spot cards/collection records.

Task 2: Sampling
% Task Spent to Date
- Conducted analysis on design effects for Wave 1

Task 3: Questionnaire Development
% Task Spent to Date
- Began update of PCG questionnaire utilizing latest instructions from research team.
- Updated self-administered questionnaires.

Task 4: CAI Programming
% Task Spent to Date
- Attended meeting to discuss Wave 2 schedule and scope, finalized documentation.

Task 5: Systems Programming
% Task Spent to date
- No effort this month.

Tasks 6, 7: Interviewer Recruitment & Hiring, Training
% Task Spent to Date
- No effort this month

Task 8: Main Data Collection
% Task Spent to Date
- No effort this month

Task 9: Post Collection Processing
% Task Spent to Date
- No effort this month

Task 10: Weighting
% Task Spent to Date
- No effort this month

Task 11: Final Data Deliverables
% Task Spent to Date
- No effort this month

Special Issues

A special concern has arisen regarding funding for the project. NICHD has not released funds for the data collection, and at least one invoice is outstanding from Fall of 2018. The SRC team is meeting on Monday 6/4/2019 to discuss how to move forward.

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 substantially 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
Jun 30, 2019

Total Cost to Date (Direct + Indirect):	8,895,454.00
Estimated Cost at Completion (E$AC):	11,842,096.00
Total Budget:	11,843,058.00
Variance (Budget minus E$AC):	962.00
Reason For Variance:	it is expected that the work scope will be modified to match available funding.

Projections
Jun 30, 2019

Dollars Projected For Month:	29,871.00
Actual Dollars Used:	31,889.00
Variance (Projected minus Actual):	2,018.00
Reason For Variance:	More effort was spent than planned to respond to repeated requests for financial information and extensive reconciliation efforts for DBS.

Measures

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

Other Measures

Project Name	HRS Enhancing Retrospective Life History Data 2019 (HRS - LHMS 2019)
Project Mode	Primary: Mail Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current

Budget   ***Direct Budget:***   443,077.00   ***InDirect Budget:***   248,124.00   ***Total Budget:***   691,201.00

Principal Investigator/Client
Jacqui Smith (SRC)
David Weir (SRC)

Funding Agency
IRB   ***HUM#:***   HUM00106904   ***Period Of Approval:***   5/28/2020

Project Team
Project Lead:	Barbara Lohr Ward
Budget Analyst:	Parina Kamdar
Production Manager:	
Senior Project Advisor:	Nicole G Kirgis
Production Manager:	Becky Kay Scherr
Production Manager:	James Koopman

Proposal #:   no data

Description:

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.

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.

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.

SRO Project Period   04/2019 - 03/2020
Data Col Period   06/2019 - 09/2019
Security Plan   NA

Milestone Dates

PreProduction Start:	04/01/2016	***Pretest Start:***	
Pretest End:		***Recruitment Start:***	06/01/2016
Staffing Completed:	06/28/2019	***GIT Start:***	
SS Train Start:	06/12/2019	***SS Train End:***	06/12/2019
DC Start:	06/18/2019	***DC End:***	10/25/2019

Other Project Team Members:

Nicole Kirgis, SPA
Barbara Ward, Surv Dir
Parina Kamdar, Budget Analyst
Becky Scherr, SSA
James, Koopman, SSI
Holly Ackerman, Programmer
Dave Dybicki, Programmer

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

- -

Report Period	May, 2019 (HRS - LHMS 2019)	**Project Phase**	Implementing

Risk Level   *Some Concerns*

Monthly Update

LHMS Tasks during May 2019
Management
• Updated and finalized preliminary project charter
• Staffed the project
• Input preliminary projections into the cost reporting system
• Submitted IRB with data management and security plan
• Prepared second IRB amendment to incorporate the non-response study
• Finalized contract for kitting/mailing vendor; reviewed and approved invoices
• Updated project schedule]
• Met with the Survey Services Lab management team to discuss schedule/staffing needs
• Negotiated data collection plan to manage overlap in the HRS samples
• Clarified coding schedule and priority
Sample
• Received the sample from the research team
• Cleaned the sample and sample addresses, checked the sample against other HRS studies, and submitted to research team for approval
• Prepared and delivered the main sample file to the vendor
Questionnaire Development
• Obtained a translation for the SAQ
• Submitted the SAQ in English and Spanish to the vendor for formatting
• Conducted iterative reviews/proofing to SAQs in English & Spanish
• Prepared recruitment scripts for the non-response sample
• Prepared a telephone version of the SAQ for the non-response sample
• Submitted the telephone recruitment and telephone SAQ for translation
Systems Development/Programming
• Met with technical and SSL teams to determine sample management system for the non-response study
• Submitted the telephone recruitment scripts to the programmer; began programming the recruitment scripts and telephone sample delivery systems
• Reviewed preliminary Weblog system; updated Weblog specifications to incorporate "Save" buttons and inventory & reconciliation management
Main Data Collection
• Requested checks for the mail portion of the study
• Finalized letters and postcards; delivered to the vendor with appropriate IRB stamps

Special Issues

There are some concerns for the project due to the late delivery of sample, and late receipt of IRB clearance (documents not approved until late evening May 30). These two issues have caused a delay in the launch of the project. The project is implementing a change in calling protocol for the non-response sample, and will end reminder calling in mid-September to avoid overlap with HRS Fall mail surveys. The response rate for the non-response sample is therefore expected to be lower than budgeted.

Cost
May 14, 2019

Total Cost to Date (Direct + Indirect):	3,279.00
Estimated Cost at Completion (E$AC):	691,201.00
Total Budget:	691,201.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	We anticipate that the project will use its entire budget. The number of cases to be completed is slightly higher than originally anticipated, however the reminder calling effort will be truncated.l

Projections
May 14, 2019

Dollars Projected For Month:	0.00
Actual Dollars Used:	3,279.00
Variance (Projected minus Actual):	-3,279.00
Reason For Variance:	The project effectively began in May, when the final budget was approved.

Measures

	Units Complete	RR	HPI
Current Goal:	2882	60% mail; 50% tele	5.0 telephone
Goal at Completion:			
Current actual:	0		
Estimate at Complete:			
Variance:			

Other Measures

Project Name	HRS Neuroimaging Pilot (HRS-Neuro)
Project Mode	Primary: Telephone Secondary: Face to Face Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 169,363.00 **InDirect Budget:** 16,936.00 **Total Budget:** 186,299.00

Principal Investigator/Client
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)

Funding Agency Alzheimer's Association

IRB   **HUM#:**   HUM00142251   **Period Of Approval:**   04/2018-04/2019

Project Team
Project Lead:	Ian Ogden
Budget Analyst:	Richard Warren Krause
Production Manager:	Veronica Connors-Burge
Senior Project Advisor:	Evanthia Leissou
Production Manager:	
Production Manager:	

Proposal #: no data

Description: 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.

SRO Project Period 01/2018 - 05/2020
Data Col Period 03/2019 - 04/2020
Security Plan NA
Milestone Dates

PreProduction Start:	01/15/2018	**Pretest Start:**	
Pretest End:		**Recruitment Start:**	
Staffing Completed:		**GIT Start:**	
SS Train Start:	03/20/2019	**SS Train End:**	03/20/2019
DC Start:	03/25/2019	**DC End:**	04/30/2020

Other Project Team Members:
[TSG] Technical Lead: Pamela Swanson
[TSG] Programmer: Ashwin Dey
[TSG] Data Manager: Qi Zhu
[TSG] Blaise Programmer: Jim Hagerman
[DCO] Production Manager: Veronica Connors-Burge
[DCO] Field TL: 1
[DCO] Field Interviewers: (n=3, one of whom will be bilingual)

Other Project Names:
HRS Neuroimaging Study
HCAP Neuroimaging Pilot
HRS NPS

Sample Mgmt Sys SurveyTrak; Project specific system (Web Logging for Site Sample Management)
Data Col Tool Blaise 4.8
Hardware Laptop; Other (Optional Laptop for External Site Teams)
DE Software Other (Web Logging for Site Data-Entry); N/A
QC Recording Tool NA
Incentive Yes, R; Yes, Other (Travel Expenses (processed and issued by imaging sites))
    Administration SRO Group; Other (Imaging Site Teams (travel expenses only))
    Payment Type Check, post ($200.00)
    Payment Method Check through STrak RPay System

Report Period	May, 2019 (HRS-Neuro)	**Project Phase**	Implementing

Risk Level *On Track*

Monthly Update [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 April, 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 site work will begin in early-June (due to unexpected delays), imaging in July. NY-region sample (Columbia) is on hold, pending IRB approval.

[Data Collection - Other Notes]
(1) First imaging appointment took place on 5/14/2019; due to a procedural delay, only one of the two scans took place during this visit; the respondent is expected to make a return visit to complete the second scan. The MRI data from this visit was successfully transmitted to USC-LONI.

(2) A protocol deviation occurred during this first appointment on 5/14/2019 in which more individual MRI scans than were called for by the HRS Neuroimaging protocol were conducted (i.e. the suite of scans conducted on ADNI-3, the study on which this pilot is based, were conducted, rather than only the two specified for HRS respondents). UM-MADC is submitting a protocol deviation to the UM-IRBMED.

(3) Unexpected steps required to begin imaging data collection at Columbia (IRB) and USC (staff coverage / protocol expectations) have come up. All will be resolved, but are expected to delay the anticipated start of imaging at USC and Columbia by approximately one additional month.

[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 April-May, 2020.

[SRO Technical Development] Primary systems finalized and working; a verification-like post-scan debriefing survey is ready for use.

[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] USC has received all necessary approvals to begin imaging; Columbia IRB still pending.

[Site Infrastructure / Protocols] Site team members introduced to Web Logging-based data capture tool. Project manager will continue to provide support to external staff to facilitate their day-to-day use.

Special Issues

(1) Managing complex workflow across multiple external sites with different operational considerations and internal protocols
(2) Making efficient use of hours of TSG staff, given somewhat high need and low projections
(3) Ensuring appropriate effort over time, given long, low-volume data collection
(4) Potential completion of some data collection work prior to issuance of a Certificate of Confidentiality
(5) Ensuring effective monitoring in the absence of coordinating center staff with clinical expertise.

Cost
Apr 30, 2019

Total Cost to Date (Direct + Indirect):	102,793.10
Estimated Cost at Completion (E$AC):	189,020.79
Total Budget:	186,299.00
Variance (Budget minus E$AC):	-2,719.79
Reason For Variance:	Due to a presumed extension of the data collection period through April, 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. Projections are expected to be updated no later than mid-July.

Projections
Apr 30, 2019

Dollars Projected For Month:	13,412.40
Actual Dollars Used:	10,962.25
Variance (Projected minus Actual):	2,450.15

Reason For Variance:

(1) NON-SALARY
(1.1) Respondent payments were projected assuming lump-sample releases; however, sample will be released on a staggered, monthly basis. As such, the overall funds spent on respondent payments is unchanged, but the monthly projections will likely come in under projections most months going forward. staggered sample release schedule, Respondent Payments came in lower than expected for the month.

(1.2) "Research and Development" costs came in approximately $1,000 lower than projected for the month of April.
----

(2) SALARY
(a) Hours for SRO staff involved in institutional infrastructure (Mike Etzel, Help Desk) lower than projected; Hours for several staff (verification data manager, project assistant) came in higher than projected.

Ultimately, the projected overrun (based on existing projections) reduced slightly from the figure as of end-of-March, 2019.

Measures

	Units Complete	RR	HPI
Current Goal:	105	65%	3.0 (tentative)
Goal at Completion:	[pending]	[pending]	[pending]
Current actual:	0	0%	2.57
Estimate at Complete:	[pending]	[pending]	[pending]
Variance:	[pending]	[pending]	[pending]

Other Measures

As of 5/31/2019:
[SRO Recruitment Rate - Goal] - 90.0%
[SRO Recruitment Rate - Current] - 85.7% (18 recruited / 21 finalized); 21 non-final
[SRO Cooperation Rate - Current] - 42.9% (18 recruited / 42 total)

[Site Completion / Scan Rate] 0.0% (0 completed / 4 finalized); 14 non-final
[Site Cooperation Rate] 0.0% (0 completed / 18 activated)

Project Name	Monitoring the Future 2019 web (MTF Web 2019)
Project Mode	Primary: Web Total of Modes: 1
Project Type	Sponsored Projects

		Project Status	Current

Budget	***Direct Budget:*** 413,377.00	***InDirect Budget:*** 229,106.00	***Total Budget:*** 642,483.00

Principal Investigator/Client	John Schulenberg (UM-SRC)
Funding Agency	

IRB   ***HUM#:***   HUM-0013R02   ***Period Of Approval:***   In continuing review

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

Proposal #:	no data
Description:	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 continiung portion and includes some development/programming work for 2020.

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.

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%.

SRO Project Period	01/2019 - 12/2019
Data Col Period	04/2019 - 10/2019
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:	Gina-Qian Yang Cheung, Donnalee Grey-Farquharson, Hueichun Oeng, Lloyd Hemingway, Shaowei Sun, Laura Yoder, Timothy Wright, Peter Sparks, Ashwin Dey
Other Project Names:	MTF Illume Web 2019
Sample Mgmt Sys	SMS; Web SMS; Illume
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, Other (Managed by SRC Study Staff)
Administration	NA
Payment Type	N/A
Payment Method	N/A

Report Period	May, 2019 (MTF Web 2019)	**Project Phase**	Implementing
Risk Level	*Not Rated*		
Monthly Update	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
Apr 30, 2019

Total Cost to Date (Direct + Indirect):	396,324.06
Estimated Cost at Completion (E$AC):	544,175.07
Total Budget:	642,483.00
Variance (Budget minus E$AC):	98,307.93
Reason For Variance:	Variance arises from incomplete projections for programming to be done over the summer. Will be updated.

Projections
Apr 30, 2019

Dollars Projected For Month:	19,884.10
Actual Dollars Used:	5,113.29
Variance (Projected minus Actual):	14,770.81
Reason For Variance:	Programming of new forms was delayed and these hours will be projected for June 2019.

Measures

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

Other Measures

Project Name	National Survey of Family Growth (NSFG 2010-2020)
Project Mode	Primary: Face to Face Total of Modes: 1
Project Type	Sponsored Projects

Project Status   Current

Budget	***Direct Budget:*** 32,653,126.47 ***InDirect Budget:*** 8,448,262.00 ***Total Budget:*** 41,101,388.47
Principal Investigator/Client	Joyce Abma (NCHS) Mick Couper (ISR)
Funding Agency	NCHS, CDC, NICHD
IRB	***HUM#:*** 0002716 ***Period Of Approval:*** 7/17/13 - 7/17/17
Project Team	***Project Lead:*** Heidi Marie Guyer ***Budget Analyst:*** Nancy E Oeffner ***Production Manager:*** Theresa Camelo ***Senior Project Advisor:*** Mary P Maher ***Production Manager:*** Maureen Joan O'Brien ***Production Manager:*** Rebecca Loomis
Proposal #:	no data
Description:	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.
SRO Project Period	09/2010 - 07/2020
Data Col Period	09/2011 - 06/2019
Security Plan	Yes

Milestone Dates

PreProduction Start:	03/01/2011	***Pretest Start:***	
Pretest End:		***Recruitment Start:***	06/01/2011
Staffing Completed:	08/17/2011	***GIT Start:***	09/13/2011
SS Train Start:	09/15/2011	***SS Train End:***	09/19/2011
DC Start:	09/20/2011	***DC End:***	09/07/2019

Other Project Team Members:	Chrissy Evanchek--Budget Analyst
Other Project Names:	
Sample Mgmt Sys	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Tablet; [UM cell] Phone; Paper and Pencil
DE Software	NA
QC Recording Tool	N/A
Incentive	Yes, R; Yes, Other (babysitting fee)
Administration	SRO Group
Payment Type	Cash, prepaid ($5; $40); Cash, post ($40; $60)
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office

- -

Report Period	May, 2019 (NSFG 2010-2020) **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	We are now in Week 10 of Q31. There are currently 1272 main interviews and 4270 screeners completed. We are above the average for this point in the quarter and since the age range expansion in both main and screeners, but the goal has been increased due to a larger sample release and increased staffing to accommodate higher goals this quarter. The current adjusted main interview goal for today is 1364 and we have completed 1272, so we are behind the new goal. It should be noted that the team aimed high for the main interview goal this Q, identifying 1650 main interviews as the goal and daily adjusted goals are based on this high goal. We expect to reach 1550 by the end of Q31 which will require us to complete 1450 main interviews in Q32. The Screener completion rate is currently 81.8%. The goal for today is 88%, so we are slightly behind for this as well. The current HPI is 10.8. While it is still higher

than the average for this point in the quarter, 9.6, and since the age range expansion, 10.3, it is lower than last quarter and continues to decrease each week. Double sample mailing went out yesterday. 698 total lines were selected for double sample, including 346 screeners and 352 main lines. We trained 6 new interviewers with NSFG past experience and high performance, by phone and in person during early May. They were very engaged and remembered information quickly. 5 passed certification with a perfect score, and one passed with only .5 points off. As the final year proceeds, we will train more as needed. 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 final quarter of production in this cycle.

Special Issues Additional funding will be 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
May 31, 2019

Total Cost to Date (Direct + Indirect):	41,472,877.91
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
May 31, 2019

Dollars Projected For Month:	651,161.01
Actual Dollars Used:	623,171.76
Variance (Projected minus Actual):	27,989.25
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
Current Goal:	1550	68%	10.0
Goal at Completion:	5000	79%	10.0
Current actual:	1272	57.5	10.8
Estimate at Complete:	4	61.8%	10.3
Variance:	28	18.2%	.3

Other Measures The goals represent Q31 goals and actuals. We are currently in Week 10 of Quarter 31. 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.

Project Name	PSID 2019 Roster Pilot (PSID19 RP)
Project Mode	Primary: Web Total of Modes: 1
Project Type	Sponsored Projects

Project Status Current

Budget	**Direct Budget:** 26,157.00 **InDirect Budget:** 14,647.00 **Total Budget:** 40,804.00
Principal Investigator/Client	David Johnson (UM) Katherine McGonagle (UM)
Funding Agency	NSF
IRB	**HUM#:** HUM00062417 **Period Of Approval:** 1/23/2019 - 1/22/20
Project Team	**Project Lead:** Shonda R Kruger-Ndiaye **Budget Analyst:** Megan Gomez-Mesquita **Production Manager:** **Senior Project Advisor:** Stephanie A Chardoul **Production Manager:** Katherine McFall Blackburn **Production Manager:**
Proposal #:	no data
Description:	PSID 2019 Roster Pilot is a project to test the feasibility of collecting PSID family listings via a Blaise 5 self-administered web instrument. The instrument was programmed by PSID's Blaise programmer. It is not mobile-optimized. SRO's scope of work includes Blaise consultation, MSMS implementation, data management, and project management. The pilot uses a convenience sample that participated in the PSID Core 19 Pretest in Oct/Nov 2018. The total number of respondents in the sample is 103. A $50 token will be paid to respondents by check at the end of data collection period (May 14th, 2019).
SRO Project Period	03/2019 - 06/2019
Data Col Period	04/2019 - 05/2019
Security Plan	NA

Milestone Dates

PreProduction Start: 02/27/2019	**Pretest Start:**
Pretest End:	**Recruitment Start:**
Staffing Completed:	**GIT Start:**
SS Train Start:	**SS Train End:**
DC Start: 04/02/2019	**DC End:** 05/13/2019

Other Project Team Members:	SRO Tech team consists of: Jim Rodgers, Jeff Smith, Kyle Goodman, Laura Yoder, Youhong Liu, Peter Sparks, Genise Pattullo Shanti Suresh, Heather Schroeder. Key Project staff consist of: Rhymney Weidner, Mary Dascola, April Beaule, Mushtaq Mohammad
Other Project Names:	PSID Family Listing Pilot FES Family Listing Pilot
Sample Mgmt Sys	MSMS
Data Col Tool	Blaise 5
Hardware	Desktop; [UM cell] Phone; Other (Self-Admin, Rs' own Hardware used)
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, R
Administration	ISR Group (PSID Project Staff)
Payment Type	Check, post ($50)
Payment Method	Check through other system (PSID's RAPS)

- - - - - - - - - - - - - - - - - -

Report Period	May, 2019 (PSID19 RP) **Project Phase** Implementing
Risk Level	On Track
Monthly Update	This study conducted data April 2 - May 13. May work consisted of continued implementation of the data collection, e.g. the execution of task rules to carry out the reminder protocol. After the initial invitation (in compliance with TCPA), all text messages were sent by hand via a project cell phone. Weekly project Tech Team meetings and PI Updates were held. Final data sets were delivered to PSID 5/15/19.
Special Issues	

Cost
May 21, 2019

Total Cost to Date (Direct + Indirect):	29,499.20
Estimated Cost at Completion (E$AC):	37,719.95
Total Budget:	40,804.00
Variance (Budget minus E$AC):	3,084.05
Reason For Variance:	Budget approved 3/18/19. Shortcodes established in April. All March charges were made to unit overhead accounts and subsequently moved. Cost data reported are from the final April Cost Report.

Projections
May 21, 2019

Dollars Projected For Month:	30,736.40
Actual Dollars Used:	29,499.20
Variance (Projected minus Actual):	1,237.20
Reason For Variance:	Fewer hours were required than originally projected for April, particularly among key TSG roles.

Measures

	Units Complete	RR	HPI
Current Goal:	NA	NA	NA
Goal at Completion:	83	80%	NA
Current actual:	88	85.4%	NA
Estimate at Complete:	88	85.4%	NA
Variance:	-5	-5.4%	NA

Other Measures   Production data are final.

Project Name	PSID Child Development Supplement V (2019) (CDS-19)
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects

		Project Status	Current

Budget	**Direct Budget:** 5,801,561.00	**InDirect Budget:** 3,164,398.00	**Total Budget:** 8,965,959.00

Principal Investigator/Client
Narayan Sastry (SRC)
Paula Fomby (SRC)

Funding Agency NICHD, Robert Wood Johnson Foundation

IRB **HUM#:** HUM00075944 **Period Of Approval:** 6/11/18 - 6/10/19

Project Team
Project Lead: Rachel Anne Orlowski
Budget Analyst: Megan Gomez-Mesquita
Production Manager: Dianne G Casey
Senior Project Advisor: Stephanie A Chardoul
Production Manager:
Production Manager:

Proposal #: no data

Description: 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.

SRO Project Period 09/2018 - 08/2020
Data Col Period 09/2019 - 05/2020
Security Plan NA
Milestone Dates

PreProduction Start:	01/07/2019	**Pretest Start:**	07/15/2019
Pretest End:	08/04/2019	**Recruitment Start:**	05/02/2019
Staffing Completed:		**GIT Start:**	09/16/2019
SS Train Start:	09/18/2019	**SS Train End:**	09/23/2019
DC Start:	09/25/2019	**DC End:**	05/31/2019

Other Project Team Members:
Other Project Names:
Sample Mgmt Sys SurveyTrak
Data Col Tool Blaise 4.8
Hardware Laptop; [UM cell] Phone
DE Software Other
QC Recording Tool Camtasia
Incentive Yes, R
   Administration ISR Group (PSID)
   Payment Type Check, post; Cash, post
   Payment Method Check through other system (PSID-RAPS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (PS

_ _

Report Period May, 2019 (CDS-19) **Project Phase** Planning

Risk Level *Not Rated*

Monthly Update Russ Stark and Kelley Popielarz named SSL managers. On-staff Iwer & TL/PC/TC/Locator/QC postings opened on 5/2; PSID Suite leadership met w/ HRS leadership on 5/20 to discuss how CDS TLs can transition to HRS as TLs. On-staff postings closed on 5/22; after meeting w/ DCO PMs on 5/29 & 5/30, planning to staff 75 iwers (instead of budgeted 78), 8 TLs (instead of budgeted 9), 2 PCs, 1 TC, 2 locators, & 1 QC coordinator. Met w/ PI team on 5/13 to confirm saliva collection protocol. Met w/ Pam Davis-Kean on 5/21 regarding WCJ Calculation test. Finished programming WCJ. CS, PCG, & Child, instruments programmed; integrated testing is underway. Signed off on Preload Builder instrument & SurveyTrak on 5/31. Pretest IRB amendment submitted on 5/23. Had Responsive

Design kick-off meeting on 5/23. Working on materials for Pretest training. Moved all remaining CDS supplies (from 2014 & WCJ) from Thompson to Perry on 5/15. ISR lab selected as recipient of saliva samples for Pretest on 5/31.

Special Issues

Cost
Apr 30, 2019

Total Cost to Date (Direct + Indirect):	438,721.57
Estimated Cost at Completion (E$AC):	8,964,983.31
Total Budget:	8,965,959.00
Variance (Budget minus E$AC):	975.69
Reason For Variance:	Minor variance - moving underrun to MDC Travel

Projections
Apr 30, 2019

Dollars Projected For Month:	322,047.38
Actual Dollars Used:	85,355.43
Variance (Projected minus Actual):	236,691.95
Reason For Variance:	Less programming effort & cost for saliva kits hasn't hit yet.

Measures

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

Other Measures

Project Name	Stress and Wellbeing in Everyday Life (SWEL)
Project Mode	Primary: Face to Face Secondary: Observation Total of Modes: 2
Project Type	Sponsored Projects

Project Status   Current

Budget	**Direct Budget:** 490,424.00	**InDirect Budget:** 269,734.00	**Total Budget:** 760,158.00

Principal Investigator/Client
Kira Birditt (UM ISR Life Course Development)
Toni Antonucci (UM ISR Life Course Development)

Funding Agency

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

Project Team
Project Lead: Piotr Dworak
Budget Analyst: Janelle P Cramer
Production Manager: Derek Dubuque
Senior Project Advisor: Kirsten Haakan Alcser
Production Manager:
Production Manager:

Proposal #: no data

Description:
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.

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).

Sample: Participants in Wave 3 of Social Relations (2014) from the Detroit tri-county area.

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.

SRO Project Period 12/2016 - 10/2017
Data Col Period 06/2017 - 09/2016
Security Plan NA
Milestone Dates

PreProduction Start: 03/01/2017		**Pretest Start:** 01/22/2018	
Pretest End: 02/02/2018		**Recruitment Start:** 11/01/2017	
Staffing Completed: 01/02/2018		**GIT Start:** 03/07/2018	
SS Train Start: 03/07/2018		**SS Train End:** 03/11/2018	
DC Start: 04/04/2018		**DC End:** 09/30/2019	

Other Project Team Members:

Other Project Names:
Racial Disparities in Health: The Roles of Stress, Social Relations, and the Cardiovascular System

Sample Mgmt Sys MSMS
Data Col Tool Blaise 4.8; Blaise 5
Hardware Laptop
DE Software NA
QC Recording Tool Camtasia
Incentive Yes, R
  Administration SRO Group
  Payment Type Cash, prepaid (2); Cash, post (30); Other (Cash post biomarker)
  Payment Method Check through other system (MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (MSMS)

- -

Report Period	May, 2019 (SWEL)	**Project Phase**	Initiation

Risk Level *Some Concerns*

Monthly Update
Project updates:
Pace of data collection continues at a higher level than in 2018 following field initiatives and increases in TOA to $200.

However, progress is still below projections plotted with expectation of ending project in September/October of 2019.

SWEL has undergone a series of internal project reviews and designs an action plan for more FTF visits with revised R materials. We are also working on additional mailings using priority mailers, which will increase project cost. Interviewers took part in a well-received half-day worksession to review the new study materials and discuss new FTF initiatives. We have also introduced changes to the technical systems described below.

SWEL has successfully migrated to the new notification app for EMA surveys.

Data collection / Sample:
"Stats: 145 completes of 325 required. Estimate for viable sample is ~ 270, however, 40% expressed concern/refusal and some 86 lines have gone through locating.

Following IRB approval SWEL may release additional sample of core network members interviewed in 2014. We are also gearing up for an FTF push and to release more sample out of area which can be interviewed by phone."

Staffing: SWEL has 4 interviewers making FTF visits + 1 interviewer making calls and scheduling appointments. We utilize 2 TLs who 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 messaging app has been successfully replaced on all SWEL BodyGuardian Kits.
Finances: Additional funding has been added to the budget. Re-projections are needed to bring budget back on track with supplemental funding.

Special Issues

Cost
May 12, 2019

Total Cost to Date (Direct + Indirect):	886,615.89
Estimated Cost at Completion (E$AC):	1,206,557.57
Total Budget:	760,158.00
Variance (Budget minus E$AC):	-446,399.57
Reason For Variance:	SWEL is approved for $1,206,680 in total cost resulting in $446,399 overrun (direct + indirect). Target direct cost is $778,424 and SWEL is projected on pace through September.

Projections
May 12, 2019

Dollars Projected For Month:	40,986.04
Actual Dollars Used:	47,258.26
Variance (Projected minus Actual):	-6,272.22
Reason For Variance:	The increase in cost is related to higher management billings related to preparing SWEL deep-dive review.

Measures

	Units Complete	RR	HPI
Current Goal:	170		
Goal at Completion:	325		
Current actual:	145		
Estimate at Complete:	325		
Variance:			

Other Measures

Project Name	Surveys of Consumer Attitudes (SCA 2019)		
Project Mode	Primary: Telephone Total of Modes: 1		
Project Type	Sponsored Projects	**Project Status**	Current
Budget	*Direct Budget:* 0.00	*InDirect Budget:* 0.00	*Total Budget:* 0.00
Principal Investigator/Client	Richard Curtin (SCA) Tuba Suzer-Gurtekin (SCA)		

Funding Agency

IRB	*HUM#:*		*Period Of Approval:*	
Project Team	*Project Lead:*	Theresa Camelo		
	Budget Analyst:	Dean E Stevens		
	Production Manager:			
	Senior Project Advisor:	Heidi Marie Guyer		
	Production Manager:			
	Production Manager:			

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

PreProduction Start:		*Pretest Start:*	
Pretest End:		*Recruitment Start:*	
Staffing Completed:		*GIT Start:*	
SS Train Start:		*SS Train End:*	
DC Start: 03/27/2019		*DC End:* 04/22/2019	

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

Report Period	May, 2019 (SCA 2019)	**Project Phase**	Initiation
Risk Level	*Not Rated*		
Monthly Update	We completed 602 cases (2 beyond goal, both were RDD partials which were accepted after closeout); 402 RDD and 200 RECON. The overall HPI for May was 3.75, about 15 minutes above the target of 3.5.		
Special Issues			

Cost
May 31, 2019

Total Cost to Date (Direct + Indirect):	86,576.33
Estimated Cost at Completion (E$AC):	96,144.52
Total Budget:	0.00
Variance (Budget minus E$AC):	86,841.33
Reason For Variance:	Increased HPI over budgeted HPI (in part from a lower HPI budgeted than actual from previous year of data collection, and in part from changes in sample delivery from the vendor).

Projections
May 31, 2019

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

Measures

	Units Complete	RR	HPI
Current Goal:	600		3.45
Goal at Completion:	602		3.75
Current actual:	602		3.75
Estimate at Complete:			
Variance:			

Other Measures

Project Name	Video Communication Technologies in Survey Data Collection (VCT)
Project Mode	Primary: Mixed Total of Modes: 3
Project Type	Sponsored Projects

Project Status Current

Budget   **Direct Budget:**   241,958.00   **InDirect Budget:**   135,497.00   **Total Budget:**   377,455.00

Principal Investigator/Client	Dr. Frederick G. Conrad (University of Michigan) Dr. Michael F. Schober (The New School)

Funding Agency National Science Foundation

IRB   **HUM#:**   HUM00159711   **Period Of Approval:**   Exempt

Project Team

Project Lead:	Andrew L Hupp
Budget Analyst:	Dean E Stevens
Production Manager:	Pooja Varma-Laughlin
Senior Project Advisor:	Nicole G Kirgis
Production Manager:	Karl A Dinkelmann
Production Manager:	

Proposal #: no data

Description: 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.

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.

SRO Project Period	09/2018 - 06/2020
Data Col Period	06/2019 - 10/2019
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:	Kallan Larsen - PSM MS Student
	Ai Rene Ong - PSM PhD 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
Other Project Names:	Video Communication Technologies
Sample Mgmt Sys	MSMS
Data Col Tool	Blaise 5
Hardware	Desktop; Other (Webcam, USB headset)
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group; Other (giftbit)
Payment Type	Cash, prepaid ($2); Other ($2 giftcode -> prepaid; $20/$22 giftcode -> post)
Payment Method	Imprest Cash Fund from ISR Business Office; Other (HSIP)

Report Period	May, 2019 (VCT)	**Project Phase**	Planning

Risk Level   *Some Concerns*

Monthly Update

Both teams continue to meet regularly. The debriefing items were settled early in the month. After some testing, we may need to add a few debriefing questions related to some technical issues (and their potential workarounds) we discovered during testing.

The team met via video during AAPOR to discuss the issues uncovered. The issues are: 1) the Blue Jeans link does not work as expected on mobile devices (smartphones and tablets), and 2) the video playback in Blaise is inconsistent. For the first issue, the link will open in a mobile browser but the camera and microphone are disabled. Blue Jeans then suggests that the app be downloaded. We confirmed with Blue Jeans that the links would not work on mobile devices, they confirmed and said the app must be used. We are going to add language to the invitation letter that deals with this. For the second issue, we tested on a variety of devices. The videos seems to playback as expected on Android devices. The behavior has been inconsistent on iOS devices. On some devices the playback works and on others only the audio plays back. We have been in touch with CBS about the issue and provided them with an example survey. They tried and experienced no problems. We tried the survey we gave them when posted on their servers and had the same mixed experience with the survey on our servers (which seems to rule out server settings issues). Our Blaise developer did a factory reset on his phone and the video playback was normal. This suggests that their is something specific else on the users device that is affecting the playback. We are investigating to see if we can figure out what it is...even if we figure it out, it likely won't make a difference (unless CBS can address it).

Pooja Varma-Laughlin worked on the posting and has selected the interviewing staff. Her and Kallan are working on the study manual and interviewing related protocols. There is a potential issue with how we were planning on staffing the project. The SSL would like to provide a dedicated portion (first & last 30 minutes) of a shift to be less disruptive to the other projects. Andrew and Pooja are thinking this through (at least for the pilot). We are trying to balance the cost of not being inefficient (having dedicated VCT shifts) while lessening the disruption to the other projects. Andrew and Pooja are working on a proposal for pilot.

Kallan has created a script for the interviewers to practice the interview prior to them being recorded. Recordings of the interviewers may begin later in May or the first part of June at the latest to allow time for editing the videos into question segments and to test that they work properly.

Kallan (with input from Kevin) is working on a feedback document for Colectica about what worked, what didn't, and what future enhancements we would like to see.

Testing continued in May. We ended up getting rid of the grid format across all displays of the instrument. In the end, after spending a lot of programming time, Blaise could not do exactly what we wanted so the decision was made to present the questions one at a time across all modes. We demo'd an updated version to the PIs.

The MSMS configuration test took longer than planned. The first integration test was not able to be started until the 24th. There will be at least one more integration test. We can test with the test data provided, but they data file isn't exactly right. Andrew is sending a message to the data manager about what needs to be changed to make the test file look more like the production file, so when we are testing the full protocol it is realistic.

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

funding.

Andrew and Kallan prepared a security and procurement review document that was shared with CMT (Marcus and Matt) and Finance (Ryan N.) to make sure everyone is aware and agrees that the external services we are planning to use have met the security and procurement requirements. We are awaiting a response of the services we have proposed using. Once we have those approvals we can move forward with the procurement and testing of those services.

UM-IT is working on selecting 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.

The one development item the team needed has been pushed to TestCurrent where Kyle has tested. This will allow us to send respondents a reminder at a specified period ahead of the appointment.

We are still waiting to hear back from the SRC Director's Office on the possibility of using giftbit as the payment meechanism (of Amazon giftcodes). Kallan and Andrew met with the ISR Business Office and Ryan Niece. Ryan also met with Kim Lim (ISR-BO) and with Cathy T. about what we are proposing. In the interim, we have an alternative plan of how we could still issue giftcode incentives in an automated fashion that will allow us to be smart with our incentives (especially for the $2 pre-pay).

Data management is taking longer than expected. Some of the data manager tasks have been moved to the project team (Kallan) to keep things moving along.

The Stat Unit (Raphael) selected the pilot sample in May. Andrew and Kallan wrote up the sampling documentation describing the purchase of the sample and how the pilot sample was selected.

Kallan ordered (and received) the postcards for the pilot. The original equipment that was purchased was tested and the remaining (3 additional cameras and headsets) were purchased.

Kallan gave her IFDTC presentation.

Kallan and Andrew meet monthly with Dean to review the cost report and update projections as necessary.

Special Issues

Cost
May 31, 2019

Total Cost to Date (Direct + Indirect):	125,092.47
Estimated Cost at Completion (E$AC):	377,986.65
Total Budget:	377,455.00
Variance (Budget minus E$AC):	-531.65
Reason For Variance:	

Projections
May 31, 2019

Dollars Projected For Month:	22,289.90
Actual Dollars Used:	21,318.75
Variance (Projected minus Actual):	971.15
Reason For Variance:	

Measures

	Units Complete	RR	HPI
Current Goal:	375	10%	
Goal at Completion:	375		
Current actual:	0		
Estimate at Complete:	375		
Variance:			

Other Measures