Survey Research Operations

Monthly Project Report

Sponsored Projects

May 2020

Sponsored Projects

(ACL-LIFE) ACLLIFE Life History Interview and Validation (ACLLIFE)
(AFHS) American Family Health Study
(ACL6) Americans' Changing Lives - Wave 6
(BFY) Baby's First Years
(Child First) Child First
(C.A.R.E.) Concussion Assessment, Research and Education (CARE) Consortium
(ED-Stars Continuation) Emergency Department Study to Assess Risk of Suicide - Continuation Project
(ECHO) Environmental Influences on Child Health Outcomes
(EDCPE) Every Dollar Counts Program Evaluation
(HRS 2018) Health and Retirement Study 2018
(HRS 2020) Health and Retirement Study 2020
(H&WB) Health and Wellbeing in Southeast Michigan
(HCDC, H&C) Housing & Children
(CAMS 2019) HRS 2019 Consumption and Activity Mail Study
(HRS - LHMS Spring 2019) HRS Enhancing Retrospective Life History Data 2019
(HRS-Neuro) HRS Neuroimaging Pilot
(OYMS 2019) HRS Off Year Mail Survey 2019
(IHDS3) India Human Development Survey Wave 3
(MTF base year 2017-2022) Monitoring the Future - Base Year 2017-2022
(MTF Panel (2017-2020)) Monitoring the Future Panel (web) non-response and locating efforts
(MTF Web 2020) Monitoring the Future Web 2020
(NDIC DMAS) National Data Innovation Centre -- Delhi Metropolitan Area Study
(NSFG 2010-2020) National Survey of Family Growth
(CDS-19) PSID Child Development Supplement V (2019)
(WMH-Qatar) Qatar World Mental Health Survey
(RDSL Recontact) Relationship Dynamics & Social Life Study, Re-contact Test
(STARRS-LS Supplement) Study to Assess Risk and Resilience in Servicemembers - Longitudinal Study S
(STARRS-LS) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study
(SCA 2020) Surveys of Comsumer Attitudes
(TAS2019) Transition Into Adulthood Supplement
(Vaping Project) Vaping Project
(VCT) Video Communication Technologies in Survey Data Collection

NonArchived Sponsored Projects

Project	Type	Status	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
ACL6	Sponsored	Current	🟡	🟡	🟡	☐	🟡	☐						
ACL-LIFE	Sponsored	Current	☐	☐	🟢	🟢	🟢	☐						
AFHS	Sponsored	Current	🟡	🟡	🟢	🟢	🟢	☐						
BFY	Sponsored	Current	🟡	🟡	🟢	🟢	🟢	☐						
C.A.R.E.	Sponsored	Current	🟡	🟡	🟡	🟡	🟡	☐						
CAMS 2019	Sponsored	Current	🟢	🟡	🟡	🟡	🟢	☐						
CDS-19	Sponsored	Current	🟡	🟡	🟡	🟡	🟡	☐						
Child First	Sponsored	Current	🟡	🟡	🟡	🟡	🟢	☐						
ECHO	Sponsored	Current	🟢	🟢	🟢	🟢	🟢	☐						
EDCPE	Sponsored	Current	🟡	🟡	🟡	🟡	🟡	☐						
ED-Stars Continuation	Sponsored	Current	🟢	🟢	🟢	🟢	🟢	☐						
H&WB	Sponsored	Current	🟡	🟡	🟡	🟡	🟡	☐						
HCAP 2020	Sponsored	Current	☐	🟢	🟢	🟢	☐	☐						
HCDC, H&C	Sponsored	Current	🟡	🟡	🟡	🟡	🟡	☐						
HRS - LHMS Spring 2019	Sponsored	Current	🟢	🟢	🟢	☐	🟢	☐						
HRS 2018	Sponsored	Current	🟡	🟡	🟡	🟡	🟡	☐						
HRS 2020	Sponsored	Current	🟡	🟡	🟡	🟢	🟡	☐						
HRS-Neuro	Sponsored	Current	🟡	🟡	🟡	🟡	🟡	☐						
IHDS3	Sponsored	Current	🟢	🟢	🟢	🟢	🟢	☐						
MTF base year 2017-2022	Sponsored	Current	☐	☐	🟢	🟢	🟢	☐						
MTF Panel (2017-2020)	Sponsored	Current	☐	☐	☐	☐	🟢	☐						
MTF Web 2020	Sponsored	Current	🟢	🟢	🟢	🟢	🟢	☐						
NDIC DMAS	Sponsored	Current	🟢	🟢	🟢	🟢	🟢	☐						
NSFG 2010-2020	Sponsored	Current	🟢	☐	🟢	🟢	🟢	☐						
OYMS 2019	Sponsored	Current	🟡	🟡	🟡	🟡	🟡	☐						
RDSL Recontact	Sponsored	Current	☐	🟡	🟡	🟡	🟡	☐						
SCA 2020	Sponsored	Current	🟢	🟢	🟢	🟢	🟢	☐						
STARRS-LS	Sponsored	Current	🟢	🟢	🟢	🟢	🟢	☐						

STARRS-LS Supplement	Sponsored	Current	🟢	🟢	🟢	🟢	🟢	☐							
SWEL	Sponsored	Current	🟡	☐	🟡	☐	☐	☐							
TAS2019	Sponsored	Current	🟢	🟢	🟢	🟢	🟢	☐							
Vaping Project	Sponsored	Current	☐	☐	☐	🟢	🟢	☐							
VCT	Sponsored	Current	🟢	🟢	🟢	🟢	🟢	☐							
WMH-Qatar	Sponsored	Current	🟢	🟢	🟢	🟢	🟢	☐							
YWC2020	Sponsored	Current	☐	🟢	🟡	🟡	☐	☐							

Project Name	ACLLIFE Life History Interview and Validation (ACLLIFE) (ACL-LIFE)
Project Mode	Primary: Telephone
Project Type	Sponsored Projects

Project Status Current

Budget	*Direct Budget:*	470,637.00	*InDirect Budget:*	263,556.00	*Total Budget:*	734,193.00

Principal Investigator/Client	Sarah Burgard (SRC, Population Studies / Sociology / Epidemiology)

Funding Agency

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

Project Team	*Project Lead:*	Terri Ann Ridenour
	Budget Analyst:	Grace Tison
	Production Manager:	
	Senior Project Advisor:	Shonda R Kruger-Ndiaye
	Production Manager:	
	Production Manager:	Elizabeth Ohryn

Proposal #:	no data
Description:	This project will conduct a Life History interview with the Americans' Changing Lives (ACL) panel by telephone from our centralized facility.

SRO Project Period	04/2020 - 08/2021
Data Col Period	01/2021 - 06/2021
Security Plan	NA

Milestone Dates

PreProduction Start:	04/01/2020	*Pretest Start:*	
Pretest End:		*Recruitment Start:*	
Staffing Completed:		*GIT Start:*	
SS Train Start:		*SS Train End:*	
DC Start:	10/30/2020	*DC End:*	

Other Project Team Members:	Shonda Kruger-Ndiaye: SPA
Terri Ridenour: SRO Lead/Project Manager
Grace Tison: Financial Analyst
Beth Ohryn: Production Manager
Jeff Smith: Technical Lead

Taylor Franklin: Production Assistant

TBD: SSI (Blaise/STrak Specs)
TBD: SSI (Weblog Specs)
TBD: SSA (Project Coordination)

Jeff Smith: SurveyTrak Programmer
Ashwin Dey: WebTrak, Weblog Programmer
Dave Dybicki: CAI Programmer-Blaise

TBD: Data Manager
TBD: Help Desk |
Other Project Names:	
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, post ($30)
Payment Method	Check through STrak RPay System

Report Period	May, 2020 (ACL-LIFE)	**Project Phase**	Planning

Risk Level   *On Track*

Monthly Update   SRO's pre-production work on the ACL-LIFE project started in May. I have regular weekly meetings with the PI to plan the ACL-LIFE project. I'm working on a staffing resource plan and will consult with Shonda, the SPA. After we receive the ACL-LIFE instrument, I will have a better understanding of project staffing needs. I will contact department admins to take steps toward securing staff resources and building our project team. I'd like to schedule a project kick-off meeting, but would like advice on when to do so given circumstances.

Here's a rough thumbnail of the pre-production phase:

1) Sampling:

Prior to delivering the sample file to SRO, Sarah's ACL study team / data manager need ~2-3 months to prepare the updated ACL panel sample -- and carry out any further locating activities, including removal of respondents who are no longer eligible. I've been consulting with their ACL data manager about updates from Wave 6.

2) Questionnaire development (Sarah's team)

3) SRO receipt of finalized questionnaire (including adapted Life History calendar)

4) Blaise (CAI) instrument programming

5) Instrument testing

6) Sample management system & report programming

7) Weblog programming (for logging and scanning copies of returned calendars)

8) QC system configuration

9) Hiring & Training of interviewers

We've offered the following resources to Dr. Burgard, to assist her:

--Blaise specification guidelines (We also offered to provide specific examples if that would be helpful.)
--Lisa Holland's assistance with questionnaire design, if desired.
--Kirsten Alcser's support with answering specific questions Sarah may have about the SHARELIFE questionnaire itself.

In terms of data collection start, we agree that it would not be ideal to launch data collection in mid or late November, or in December. If the questionnaire is fairly straightforward, with clear workscope decisions made, we could target a late October or early November launch.

However, if the questionnaire or protocols are more complicated, we will discuss the option of a late 2020 launch vs shifting to January 2021. Another option would be to begin locating work in late 2020 and kick interviewing off in January. We'll be able to better assess the timeline once we see the questionnaire and protocol specifications.

Special Issues

Cost
Jun 09, 2020

Total Cost to Date (Direct + Indirect):	4,072.68
Estimated Cost at Completion (E$AC):	707,203.19
Total Budget:	734,193.00
Variance (Budget minus E$AC):	26,989.81
Reason For Variance:	I am taking steps to launch project and working on updated projections.

Projections
Jun 09, 2020

Dollars Projected For Month:	5,151.77
Actual Dollars Used:	1,767.04
Variance (Projected minus Actual):	3,384.73
Reason For Variance:	Working on staff plan.

Measures

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

Other Measures

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#:** 00167171	**Period Of Approval:**
Project Team	**Project Lead:**	Rebecca Gatward
	Budget Analyst:	Dean E Stevens
	Production Manager:	Pooja Varma-Laughlin
	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:	04/21/2020	*DC End:*	10/31/2021

Other Project Team Members:	SRO Team: Leah Roberts, Andrew Hupp, Matt Hanger, Neil Erikson, Pooja Varma-Laughlin, Jim Rodgers, Keith Liebetreu, Colette Keyser
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

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Report Period	May, 2020 (AFHS)	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update

May update
- The 'cut off' date for completion of the screener form (extended by on week) was 6/5 for the first soft launch.
- The initial invite was mailed to the second soft launch group on Thursday 4 June (n=100 - including two 'plants').
- Mailing test; the initial invite was mailed to a group of 51 SRO related people on 27 May. To date, the majority have let me know that they have received the letter. On 6/4 I emailed a thank you to those who had responded and a reminder to those who had not. The results show that the delivery times are still variable (2-10 days) and there are differences within states. On 6/12 around four invites had still not been delivered.
- We are planning on mailing the initial invite to the remainder of replicate 1 (~19,000) in around the third week of July.

Special Issues

Response has been slow. We have encountered some severe mail issues due to the impact of the COVID pandemic on USPS.

Cost
Jun 08, 2020

Total Cost to Date (Direct + Indirect):	837,788.30
Estimated Cost at Completion (E$AC):	2,346,566.70
Total Budget:	2,490,133.00
Variance (Budget minus E$AC):	143,566.00
Reason For Variance:	Total costs are lower than budgeted - A major protocol change which reduced costs was changing the age eligibility from 16-49 years to 18-49 years. This meant we will not spend IWER hours contacting parents of 16-18 (or 21 years in some states) to gain permission to include young adult children in the survey. - We have also saved costs by contracting out formatting, printing, mailing and screening tasks to DataForce.

Projections
Jun 08, 2020

Dollars Projected For Month:	155,212.27
Actual Dollars Used:	145,412.44
Variance (Projected minus Actual):	9,799.83
Reason For Variance:	The variance was due to the delay in releasing the full replicate 1 sample. Response has been very slow, mainly due to mail issues (letters have taken longer to reach addresses) - resulting in fewer cases to manage, pay TOAs etc.

Measures

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

Other Measures

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:*	09/14/2019

Other Project Team Members:	Shonda Kruger-Ndiaye: SPA Terri Ridenour: SRO Lead/Project Manager Jaime Koopman: SSI (Blaise/STrak Specs) Gary Hein: SSI (Weblog Specs) Debra Heier: SSA (Project Coordination) Becky Scherr: SSA (Project Coordination) Grace Tison: Financial Analyst Lisa Carn: Production Manager Russ Stark: SSL STrak systems consultant and lab management Jeff Smith: Technical Lead Stephanie Windisch (and Chris Greene): Data Managers Jeff Smith: SurveyTrak Programmer Ashwin Dey: WebTrak, Weblog Programmer Dave Dybicki: CAI Programmer-Blaise Andrea Pierce: Help Desk
Other Project Names:	"Racial inequalities in health throughout adulthood: The cumulative impact of neighborhood chemical and non-chemical stressors on epigenomic pathways" (aka, "Social epigenomics of racial health inequalities - SERHI")
Sample Mgmt Sys	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Desktop
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, prepaid ($30 (interview)); Other (Check, prepaid - $50 (consent to WBD/making home appointment))
Payment Method	NA

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Report Period	May, 2020 (ACL6)	**Project Phase**	Closing
Risk Level	*Some Concerns*		

Monthly Update

Phase 1 of the ACL6 project is currently on hiatus. The Phase 2, decentralized (Reboot) proposal and updated ballpark budget was submitted to the PI on 12/24/19. Dr. Hicken submitted the request for an administrative supplement from sponsor (NIMHD) and is awaiting response.

As of 4/24/20 when we met to discuss ACL sample, as it relates to the new ACL-LIFE study, Maggie did not seem hopeful about funding. Based on her communication with the program officer, it sounded like if the administrative supplement was funded, it would only be used for the Home Visit portion of the study.

REF: ACL6 Decentralized Reboot – Reduced scope
SRO #18-0002R01S04

This work is a continuation of data collection activities for the Social Stress and Vulnerability to Environmental Toxicants: Epigenomic Pathways to Health Inequalities project, and proposes to transfer approximately 290 sample lines from the original Survey Services Laboratory (SSL) data collection to the field for face-to-face data collection. These lines include all non-Hispanic Black respondents and other respondents deemed high priority. We have also budgeted additional effort to recontact 392 respondents who have already completed the interview, but who did not consent to or complete the Home Visit portion of the data collection. For the main interview portion of the project the interview length is 60 minutes with an additional 15 minutes for consent to a follow-up ExamOne home visit; we

estimate that approximately 88 respondents will agree to complete the interview; all 290 samples lines will receive a pre-paid incentive of $30; each respondent who completes a face-to-face interview will receive a post-paid incentive of $70; and each respondent who completes the ExamOne home visit will receive an additional post-paid incentive of $100. For the Home Visit Refusal Conversion we have assumed 392 respondents who completed the interview will be requested to consent to and complete the ExamOne Home Visit; we expect that we will be able to attempt 278 of these lines face-to-face, and the remaining 114 by decentralized telephone; this budget contains all effort and materials needed to attempt to obtain consent from these individuals; this work must be done concurrently with the Reboot interviewing activity described above; respondents who complete the ExamOne Home Visit will receive a $100 post-paid incentive.

Please see this folder for latest Proposal Docs that were submitted:
L:\projects\ACL6\02 Budget\Proposal Docs\Reboot Ballpark Estimate

Special Issues

Cost
Jun 09, 2020

Total Cost to Date (Direct + Indirect):	776,123.49
Estimated Cost at Completion (E$AC):	776,123.49
Total Budget:	722,153.00
Variance (Budget minus E$AC):	-53,970.49
Reason For Variance:	Please see Monthly Updates.

Projections
Jun 09, 2020

Dollars Projected For Month:	38.71
Actual Dollars Used:	141.18
Variance (Projected minus Actual):	-102.47
Reason For Variance:	Some unexpected charges hit for replacement incentive check requests.

Measures

	Units Complete	RR	HPI
Current Goal:	1,058 (1,526 sample)	80%	5
Goal at Completion:			
Current actual:	729	54%	6.7
Estimate at Complete:			
Variance:			

Other Measures

Home Visit Consent

Goal at Completion: 700

Current Actual: 413
Current Undecided: 20

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:*** 4,330,584.00 ***InDirect Budget:*** 1,797,114.00 ***Total Budget:*** 6,127,698.00
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:*	06/30/2022

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

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, 2020 (BFY)	**Project Phase**	Implementing

Risk Level *On Track*

Monthly Update Project updates:

BFY has exceeded overall goals for Age 1 with 916 interviews compared to 894 planned. However, aside from overall goals, the PIs want us to focus on maximizing the response rate within the control group which has been lagging behind the experiment group. We are currently 3 interviews away from meeting the overall goal, however some sites (NE and LA) are lagging around 5 interviews behind reaching the 90% completion rate goal. Age 1 data collection will continue through the end of June to minimize that deficit. Age 2 remote training is planned for June 25 - 27 and additional sessions will be conducted on team calls. Age 2 data collection start is planned for July 6th with phone interviews. We are tentatively planning an additional training in-person in AA on safety procedures and conducting the in-person Age 2 activities. However, the feasibility of in-person work depends on local / site, IRB (TCCU, NYSPI, and UM), and university regulations governing the in-person fieldwork. The budget overrun has been presented and accepted by the PIs. We have been approved to add an Age 1 interviewer bonus of $200 for iwers and TLs.

Data collection / Sample: Weekly goals and actual by site:

	Goal	Actual	+/-
Overall	872	916	44
Nebraska	256	265	9
New York	251	275	24
Minnesota	107	111	4
Louisiana	258	265	7

Staffing:

Age 1 / Age 2 Staffing:
16 iwers in total
NE: 3 (1 NH BFY Enrollment experience / 2 from Jan 2020 hire)
MN: 2 (1 Enrollment NH / 1 Jan 2020 hire)
NY: 4 OS (3 with Enrollment experience)
NOLA: 5 (2 Enrollment NH and 1 OS / 2 from Jan 2020 hire)
Locators: 2 (OS, one with shared responsibilty as a traveler)"

Technical system:

BFY is now focusing on Age 2 implementation and ensuring integrity of Age 1 data after switching to phone. The switch to phone required changes to the data merge process since all instruments are suspended after completing the part suitable for phone administration. To meet Age 2 deadlines, we have postponed plans for launching the mid-wave self-administered web survey.
Finances: The budget projection from 5/14 has been accepted by the PIs and included plans for additional outreach activities and field staffing + iwer pay increases. The current budget is also modeling Covid-19 impact on the project.

Special Issues

Cost
Jun 05, 2020

Total Cost to Date (Direct + Indirect):	3,858,056.36
Estimated Cost at Completion (E$AC):	6,972,674.18
Total Budget:	6,127,698.00
Variance (Budget minus E$AC):	-844,976.18
Reason For Variance:	The projected overrun was presented to the Pis and accepted given the additional scope of work across Ages 1 - 3.

Projections
Jun 05, 2020

Dollars Projected For Month:	103,003.59
Actual Dollars Used:	111,554.81
Variance (Projected minus Actual):	-8,551.22
Reason For Variance:	Underprojection for field staff (Iwers, TLs, PMs)

Measures

	Units Complete	RR	HPI
Current Goal:	894	—	9
Goal at Completion:	894	—	11
Current actual:	916	—	9.5
Estimate at Complete:	920	—	11
Variance:			

Other Measures

Project Name	Child First (Child First)
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 3
Project Type	Sponsored Projects **Project Status** Current
Budget	***Direct Budget:*** 1,041,810.00 ***InDirect Budget:*** 104,182.00 ***Total Budget:*** 1,145,992.00
Principal Investigator/Client	Stephanie Chardoul (SRO/SRC)

Funding Agency	MDRC, (Laura and John Arnold Foundation, The Duke Endowment)
IRB	***HUM#:*** HUM00166328 ***Period Of Approval:*** 9/11/2020
Project Team	***Project Lead:*** Barbara Lohr Ward
	Budget Analyst: Parina Kamdar
	Production Manager: Lloyd Fate Hemingway
	Senior Project Advisor: Nicole G Kirgis
	Production Manager: Taylor Franklin
	Production Manager:

Proposal #:	no data
Description:	Child First (CF) is a comprehensive, home-based, therapeutic intervention targeting multi-risk young children and families, embedded in a coordinated system of care. An earlier randomized control trial (RCT) of CF showed very promising impacts in one site with a small sample of families (N = 157; see Lowell et al., 2011 published in Child Development). The current RCT will be conducted in a broader number of sites across two states (Connecticut and North Carolina) to help answer questions about whether the demonstrated impacts of CF can be replicated at-scale across multiple locations. The study aims to estimate the impact of the Child First program on outcomes for children, parents, and families measured 12-and 36-months after random assignment. In addition, the current study will look at whether Child First is more beneficial for certain subgroups of families, including caregivers who have experienced trauma or substance abuse, have a history of depression, and children exhibiting issues with behavior or language development.

SRO Project Period	10/2019 - 03/2022
Data Col Period	08/2020 - 12/2021
Security Plan	NA

Milestone Dates

PreProduction Start:	09/01/2019	***Pretest Start:***	
Pretest End:		***Recruitment Start:***	03/01/2020
Staffing Completed:	07/01/2020	***GIT Start:***	07/25/2020
SS Train Start:	07/27/2020	***SS Train End:***	07/31/2020
DC Start:	08/01/2020	***DC End:***	12/31/2021

Other Project Team Members:	Tricia Blanchard, Genise Pattullo, Shanti Suresh, Neil Eriksen.
Other Project Names:	
Sample Mgmt Sys	MSMS
Data Col Tool	Blaise 4.8
Hardware	Laptop; [UM cell] Phone; Other (Video Recording Equipment)
DE Software	NA
QC Recording Tool	DRI-CARI; Other (Video Recording)
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post ($50); Cash, prepaid ($2 locating payment); Cash, post ($50 cash post assessment)
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest C

Report Period	May, 2020 (Child First) **Project Phase** Closing
Risk Level	*On Track*
Monthly Update	Project Status

At the request of the Child First team, the project has suspended all operations except 3-month locating activities. Because of this, the project will not be able to move forward with an August 2020 launch.

Mailing activities for all cohorts were placed on hold in early May at the request of the research team, which the

research team evaluated the need for changes to the locating letter. Mailing for 3-month activities were resumed later in the month. Timed Accurint searches and phone calls continued on schedule. Work on questionnaire specification, PLS-5 specification and programming, and production sample management system programming remain on hold.

The coronavirus pandemic remains a schedule and scope risk to the project. All in-person (face-to-face) human-subjects research has been temporarily suspended at the University of Michigan, as is domestic travel (needed for interviewer recruitment, which must occur 2 to 3 months in advance of interviewer training). The Survey Research Center team will provide regular updates to the MDRC team and will advise as to when in-person research can continue.

Project Schedule Status
With the exception of some 3 month locating, project activities were suspended at the request of MDRC.   When project activities resume, SRC will assess resources and will advise on adjustments to the project schedule.

During May 2020 SRC activities included the following:

Task 1: Management, Budget and Work Plan
- Responded to email inquiries as necessary.
- Reviewed and updated spending projections.
- Prepared monthly report.

Task 2: Sampling
- No effort this month

Task 3: Questionnaire Development
- No effort this month.

Task 4: CAI Programming
- No effort this month.

Task 5: Systems Programming
- No effort this month

Tasks 6, 7: Interviewer Recruitment & Hiring, Training
- No effort this month

Task 8: Main Data Collection
- No effort this month

Task 9: Post Collection Processing
- No effort this month

Task 10: Weighting
- No effort this month

Task 11: Final Data Deliverables
- No effort this month

Task 12: Locating
- Reconciled imprest cash fund for May.
- 3-month mailing activities were as follows:
o   Prepared and shipped 1st 3-month mailing for Cohorts 9 and 10. (Cohorts 9 and 10 mailed together per instructions from MDRC).
o   Prepared and shipped 2nd 3-month mailing for Cohort 7
o   Conducted Accurint search on cohort 8 non-responders.
o   Conducted outgoing calls for cohort 8 and updated addresses as appropriate.
- 9-month mailing activities
o   All 9-month mailing activities are on hold.
- Prepared reports.

Activities Planned for June 2020
- Management
o   Participate in meetings as necessary; respond to email, other requests for information
o   Update spending projections and prepare monthly report

  o   Close project, prepare final reports and deliverables
  •   Locating
  o   3-month mailing activities
  ☐   Log incoming calls and cards
  ☐   No activities planned
  o   9-Month Locating activities
  ☐   No activities planned
  o   Prepare final sample file deliverable

Special Issues   The project is being place on hold and closed at the end of June 2020.

Cost
Jun 30, 2020

Total Cost to Date (Direct + Indirect):	107,261.51
Estimated Cost at Completion (E$AC):	114,559.08
Total Budget:	1,145,992.00
Variance (Budget minus E$AC):	916,873.83
Reason For Variance:	The projections reflect that the project will go on hold at the end of June 2020. We are uncertain as to when the project will restart.

Projections
Jun 30, 2020

Dollars Projected For Month:	2,503.84
Actual Dollars Used:	2,185.73
Variance (Projected minus Actual):	318.00
Reason For Variance:	Most project activities were place on hold during the month of May.

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:			
Current actual:			
Estimate at Complete:			
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, Hongyu Johnson, Keith Leibetreu, James Koopman

**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

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Report Period	May, 2020 (C.A.R.E.)	**Project Phase**	Implementing

Risk Level   *Some Concerns*

Monthly Update

System
Programming and testing is continuing to streamline/refine the system. Version 2a update was received in early March. Version 2b update that was due early May has been delayed.

Production
Sample Release 6 was received - 1920 cases.
CRS has been updated with projections to end data collection no sooner than September 2020 (Instead of July 31, 2020)

Production Statistics at the end of May:

	rel1	rel2	rel3	rel4	rel5	rel6	OTH*
Released Cases	492	92	981	1,827	1,510	1910	18
Response Rate	28%	15%	23% 16%		15%	13% 76	
WEB	11%	11%	21%	15%	15%	12%	65
CATI	17%	4%	2%	1%	0%	0%	12%

*OTH – cases not initially assigned to ISR but were transferred to SRO because R replied to email which goes to SRO Study (email) box.

Special Issues

**Cost
May 31, 2020**

Total Cost to Date (Direct + Indirect):	638,440.99
Estimated Cost at Completion (E$AC):	1,004,992.12
Total Budget:	1,034,833.00
Variance (Budget minus E$AC):	29,839.88
Reason For Variance:	Projected under-run is greatly reduced from prior months since funds are being routed to a no-cost extension for the data collection field period. Adjustments to come will likely reduce current under-run.

**Projections
May 31, 2020**

Dollars Projected For Month:	80,788.44
Actual Dollars Used:	72,349.95
Variance (Projected minus Actual):	8,438.49
Reason For Variance:	Field staff production hours were lower than projected.

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, I
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, 2020 (ED-Stars Continuation)	**Project Phase**	Closing

Risk Level	On Track

Monthly Update   April 10th was the last day of data collection. The project ended with 137 Case interviews and 309 completed Control interviews, for a total of 446 completed interviews. The final RR was 73% for closed cases. Controls had a higher RR than Cases (78% for Controls and 64% for Cases). 1073 Study 2 respondents agreed to participate out of 1437, for an overall consent rate of 8275% (both parents + teen). 139 sample lines were determined ineligible due to no cell phone access which made them unable to participate in the txt survey from Ubitrix.   We were delivered 170 unique cases (first attempters) and completed 106. The last case was delivered on 3/27, and expired April 10th. Three weeks prior to the end of data collection, the DCC informed us they had 33 new controls to deliver which we were unaware of, as the control selection criteria had been loosened in order to match more controls to cases. We were able to add on more SSL Iwer shifts to accommodate the new sample, more active sample than we had ever had at once, when we had been tapering down due to very low sample delivery and preparing to end production.   Due to this increase in sample and hours, cost to complete did increase by a small amount, which was approved by the PI. The April cost report indicates a small overrun, smaller than the approved amount.   We may continue to see very minor costs still come in but not enough to go over the approved amount. The final Iwer debrief with the Co-PI was Tuesday, April 14, via phone.   As a result of the COVID-19 pandemic, SSL worked remotely during the last few weeks of data collection to complete interviews via cell phone and remoting into an SSL desktop via an SRO laptop. During this time, it was not possible to record interviews due to the systems not working on laptops. All cases, and controls who flaged the safety protocol during an interview, were still transferred to Boystown. The offsite protocol changes were been submitted as an IRB amendment by the PI staff and approved. The SRO Final Report was delivered to the PI on May 31, 2020.

Special Issues

Cost
Jun 30, 2020

Total Cost to Date (Direct + Indirect):	626,848.89
Estimated Cost at Completion (E$AC):	642,914.72
Total Budget:	529,284.00
Variance (Budget minus E$AC):	-2,493.72
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. Current overrun is due to additional sample being added at the end of data collection, requiring more staffing hours to work additional sample. PI approved and has committed to cover overrun.

Projections
Jun 30, 2020

Dollars Projected For Month:	13,435.96
Actual Dollars Used:	15,439.78
Variance (Projected minus Actual):	-2,003.82
Reason For Variance:	Variance is due to staffing hours there was a large sample delivery which we were unaware was coming, 3 weeks before the end of data collection. We were able to increase some Iwer hours to accommodate working the sample. Hours may be more reflected in 1st 2 weeks of April rather than last 2 weeks of March.

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:	1800		
Current actual:	446	74	3.19
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:** 302,269.00 **InDirect Budget:** 169,270.00 **Total Budget:** 471,539.00
Principal Investigator/Client	Nigel Paneth (Michigan State University) Michael Elliott (University of Michigan) Jean Kerver (Michigan State University)
Funding Agency	NIH
IRB	**HUM#:** HUM00139050 **Period Of Approval:** 10/7/2019-10/6/2020

Project Team

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

Proposal #:   no data

Description:

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

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

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

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

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

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

SRO Project Period	01/2017 - 08/2023
Data Col Period	05/2018 - 03/2023
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 Jonathan Harrison and Neil Eriksen: Data Managers (Phase 1) Brad Goodwin: Data Manager (Phase 1) Jeff Smith: Systems Programmer Ashwin Dey: Systems Programmer Hueichun Peng: CAI Programmer-Illume Jim Hagerman: CAI Programmer-Blaise Shaowei Sun: Biospecimen Logging Application Programmer Deb Wilson: Help Desk
Other Project Names:	
Sample Mgmt Sys	SurveyTrak; Illume
Data Col Tool	Blaise 4.8; Illume
Hardware	Laptop; Tablet; [UM cell] Phone; Paper and Pencil
DE Software	Other (Custom Biospecimen Logging Application)
QC Recording Tool	Camtasia
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post ($20 (3-Month IW), $20 (Biospecimen))
Payment Method	Check through STrak RPay System

Report Period	May, 2020 (ECHO) **Project Phase** Implementing
Risk Level	*On Track*

Monthly Update

I worked with Parina and Rolfe on the Year 5 Continuation (SRO #20-0054) rebudget, given the change in work scope (i.e. shifting recruitment timeline). The scope has shifted significantly since the rebudget that was done in 2018 (SRO #16-0057C2). Y4 work scope will now shift to Y5, and Y5 work scope to Y6.

In response to the COVID-19 global pandemic, here are the latest updates:

[Communication]: We have continued our weekly study office calls and receive regular updates from the PIs who are also epidemiologists. We all understand communication (in any/all forms) is critical at this time.

[Phase 1 - Prenatal Recruitment (Non-SRO staff)]: The hospital engagement team and special committee at MSU is working out plan for return to clinic recruitment. Optimism expressed during the latest PI meeting about returning to clinics in June.

--Ann Arbor (St. Joe)
--Novi (St. John)
--Dearborn (Beaumont)
--Detroit (DMC)
--Saginaw (Covenant)
--Grand Rapids (Spectrum-Butterworth)
--Port Huron (McLaren)

[Phase 1 - Prenatal Follow Up (Non-SRO staff)]: Prenatal follow-up data collection activities continue. Recruiters follow up with women by TEL-only to complete their PN1 and/or PN2 surveys. At this time, there is one recruiter that is authorized to proceed with blood/urine specimen collection: Erica (Beaumont). Placenta collection continues at all sites, via pathology/lab staff. Information will be recorded on paper and entered in database at a later time. The DMC recruiter (Shetoya) is working on medical abstraction for the study during the hiatus. The new recruiters are helping with follow-up surveys prenatal surveys and surveys administered by MSU team.

[Phase 2 - Three-Month TEL Interview and Biospecimen Administration (SRO Staff)]: The 3M interview is TEL-only and continues without interruption. Post-interview affirmation of consent to participate in an infant specimen collection will continue as well. After a 3 week pause, shipment of infant poop collection materials have resumed. Interviewers continue to notify those respondents who agree to this component. Infant toenail collection protocol planning in progress and training/implementation expected within next 3 weeks.

[Phase 1 and 2 - Research / Administrative Support]: Project staff (Debra) continues to work on ECHO consent PDF documentation from home. Ian continues to come in to Perry every other week to manage mailing of checks and

letters related to the ECHO project.

To date, 843 women have been recruited in clinics. Among those cases, 698 were still eligible and active study participants during Phase 1 (prenatal period up until child birth). The MARCH recruitment target is 1,100 live births.

[Phase 2: 3-Month Data Collection Summary]
    Babies born: 646
    3-month sample released: 609
    3-Month Interviews Completed: 422
    Production HPI: 3.14
    Average Attempts / Iw: 7.3
    Iw length: 31.24
    Response Rate: 71%

Special Issues

Cost
Jun 08, 2020

Total Cost to Date (Direct + Indirect):	334,769.36
Estimated Cost at Completion (E$AC):	440,226.22
Total Budget:	471,539.00
Variance (Budget minus E$AC):	31,312.78
Reason For Variance:	Despite additional Y4 scope (i.e. expansion of biospecimen logging application to include ARCH in-person specimen and new MARCH ECHO specimen protocols, and Illume programming updates to add required ECHO National consent language and survey questions), we are currently projecting growing cost underrun. This is due to the COVID-19 pandemic's pause of MARCH sample recruitment/consent and decline in prenatal data collection activity.

Projections
Jun 08, 2020

Dollars Projected For Month:	34,336.23
Actual Dollars Used:	36,833.60
Variance (Projected minus Actual):	2,497.37
Reason For Variance:	We continue to monitor and adjust our projections for the Y4 budget based on shifted scope of work, as a result of the pause in recruitment.

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:***	2,011,810.00	***InDirect Budget:***	603,543.00	***Total Budget:*** 2,615,353.00

Principal Investigator/Client
Y Combinator Research
Dr. Elizabeth Rhodes (Y Combinator Research)
Dr. Sarah Miller (University of Michigan)

Funding Agency

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

Project Team		
	Project Lead:	Karin Schneider
	Budget Analyst:	Megan Gomez-Mesquita
	Production Manager:	Barbara Aghababian-Homburg
	Senior Project Advisor:	Kirsten Haakan Alcser
	Production Manager:	Donnalee Ann Grey-Farquharson
	Production Manager:	Carlos Andres Macuada Lopez

Proposal #:   no data

Description:

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

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

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

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

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

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

Computer Assisted Interviewing (CAI) Programming:
•   SRO will program and test the 45-minute pilot and baseline instruments in both English and Spanish.

Sample Control Systems:
•   SRO will customize our sample management system to control all screened sample provided by 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), Megan Gomez-Mesquita (Financial Analyst)

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, 2020 (EDCPE)	**Project Phase**	Implementing

Risk Level — *Some Concerns*

Monthly Update

Promised sample lines for May were not received. Response rate is lower than it was for FtF. There is a high percentage of cancelled, rescheduled, and "no-show" for interviews. There are recording issues - about 30% of the initial phone interviews had recording issues. This is concerning since EDC is now using audio consent. SRO staff is looking into a solution to improve the recording issue as well as an alternative way to collect consent that was not recorded.

COVID charges seem high and are being looked into by the financial analyst. The PIs are requesting more details about the current over-run especially as it is so soon after the newly approved budget with an additional ~$615,000. They are also requesting documentation about COVID charges since the current information does not cover them precisely – this funding is neither non-profit nor government/federal.

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.

Promised sample has not been received and this is reducing efficiency, productivity, affecting RR, and increasing projected costs.

Cost
May 31, 2020

Total Cost to Date (Direct + Indirect):	2,056,354.11
Estimated Cost at Completion (E$AC):	2,812,161.19
Total Budget:	2,615,353.00
Variance (Budget minus E$AC):	-196,808.19
Reason For Variance:	The overrun is based on unanticipated costs associated with the transition from FtF to phone interviewing due to the COVID-19 pandemic, such as programming, training and COVID-19 (non-worked) hours.

Projections
May 31, 2020

Dollars Projected For Month:	129,468.10
Actual Dollars Used:	151,249.55
Variance (Projected minus Actual):	-21,781.45
Reason For Variance:	Some COVID-19 hours. Also, freight and printing charges for new respondent mailing protocol, - costs more than anticipated. SRO team getting a sense of costs that will help to more accurately project costs for future months.

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

Principal Investigator/Client   David Weir (ISR-SRC)

Funding Agency

IRB	*HUM#:*	HUM00061128	*Period Of Approval:*
Project Team	*Project Lead:*	Nicole G Kirgis	
	Budget Analyst:	Richard Warren Krause	
	Production Manager:	Stephanie Sullivan	
	Senior Project Advisor:	Mary P Maher	
	Production Manager:	Rebecca Gatward	
	Production Manager:	Jennifer C Arrieta	

Proposal #:   no data

Description: The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain representativeness. A series of physical measures and biomarkers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records and Veterans Administration (VA) records is requested. A self-administered "leave behind" paper questionnaire is given to respondents interviewed in person.

SRO Project Period	01/2018 - 06/2018
Data Col Period	04/2018 - 04/2019
Security Plan	NA

Milestone Dates

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, 2020 (HRS 2018)	**Project Phase**	Closing

Risk Level   *Some Concerns*

Monthly Update   HRS 2018: Cost monitoring was the only activity during April.

HRS 2019 (EGenX): No activities during the month. Cost to complete is estimated at $982,882.78 which is $37,207.78 above the funds that have been allocated by HRS project staff.

Special Issues

Cost
May 31, 2020

Total Cost to Date (Direct + Indirect):	18,143,632.24
Estimated Cost at Completion (E$AC):	18,143,632.24
Total Budget:	18,139,654.00
Variance (Budget minus E$AC):	-3,978.24
Reason For Variance:	We were approximately 21,000 interviewer hours over the budgeted amount (due to the high HPI) in order to attain the 74% response rate. In addition, Whole Blood Draw data collection extended December 2019. HRS project staff has allocated funds to cover the over-run. MPR has been updated to reflect the current budget.

Projections
May 31, 2020

Dollars Projected For Month:	0.00
Actual Dollars Used:	162.61
Variance (Projected minus Actual):	-110.13
Reason For Variance:	Variance is due to freight and postage hitting that were not projected.

Measures

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

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

Project Name	Health and Retirement Study 2020 (HRS 2020)
Project Mode	Primary: Mixed Secondary: Web Total of Modes: 3
Project Type	Sponsored Projects
	Project Status Current
Budget	***Direct Budget:*** 11,961,346.00 ***InDirect Budget:*** 4,306,085.00 ***Total Budget:*** 16,267,431.00
Principal Investigator/Client	David Weir (ISR-SRC)
Funding Agency	
IRB	***HUM#:*** HUM00061128 ***Period Of Approval:*** 10/3/18-10/2/19
Project Team	***Project Lead:*** Evanthia Leissou
	Budget Analyst: Richard Warren Krause
	Production Manager: Andrea Pierce
	Senior Project Advisor: Nicole G Kirgis
	Production Manager: Jennifer C Arrieta
	Production Manager: Rebecca Gatward
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 a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.
SRO Project Period	01/2019 - 08/2021
Data Col Period	03/2020 - 03/2021
Security Plan	NA

Milestone Dates

PreProduction Start:	01/01/2019	***Pretest Start:***	11/11/2019
Pretest End:	11/23/2019	***Recruitment Start:***	09/01/2019
Staffing Completed:	12/15/2019	***GIT Start:***	02/17/2020
SS Train Start:	02/19/2020	***SS Train End:***	02/26/2020
DC Start:	03/02/2020	***DC End:***	03/27/2021

Other Project Team Members:	Derek Dubuque (Production Manager), Sharon Parker (Production Management Coordination), Andrew Hupp (Project Manager), Dan Tomlin (Project Manager), Gary Hein (Project Manager), Leah Roberts (Training Coordinator), Daniah Buageila (Lead Project Assistant), Anna Fuqua-Smith (Project Assistant), Janet McBride (Project Assistant), Paul Burton (Stats/Sampling)
Other Project Names:	
Sample Mgmt Sys	SurveyTrak; MSMS
Data Col Tool	Blaise 5
Hardware	Laptop; [UM cell] Phone; Paper and Pencil
DE Software	Other (Blaise 5 Coding Application); External vendor (DataForce Scanning SAQs)
QC Recording Tool	Camtasia
Incentive	Yes, R; Yes, INF
Administration	NA
Payment Type	Check, prepaid (80.00); Check, post ($50); Cash, post (20.00); Other (Money Order (by request))
Payment Method	Check through STrak RPay System; Check through other system (Rpay system set up for MSMS); Interviewer p

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Report Period	May, 2020 (HRS 2020) **Project Phase** Implementing
Risk Level	*Some Concerns*
Monthly Update	Date collection began March 2nd with 109 field interviewers. A couple weeks into March, in person data collection was halted due to COVID19 restrictions. All preferred mode TEL sample was released to the field and all preferred mode FTF sample was approved for phone interviews. Data collection began to slow down during May with sample becoming less efficient. Twenty-three interviewers who finished their work on another project had refresher training. Fifty percent of the preferred mode FTFe have been approved for phone interviews with planned release of the sample mid-June (pushed back from early June). The first Web release 1 of 104 cases launched May 15th with the second release of about 2,300 SIDs scheduled for Mid-June.

The team continued to focus on technical development, systems testing, interviewer supplies, precontact mailing preparations for field and web, updating weekly goal projections, coding system development, and preparing for the new SAQ protocol.

Measures noted in tables below are as of week 13 of data collection (end of May)

Special Issues
COVID19 pandemic impact to conducting in person interviews
Multiple preload updates and critical issues identified in programming of the datamodel which has delayed the release of fresh sample to the field staff.

Cost
May 31, 2020

Total Cost to Date (Direct + Indirect):	6,733,662.68
Estimated Cost at Completion (E$AC):	15,976,063.64
Total Budget:	16,267,431.00
Variance (Budget minus E$AC):	291,367.36
Reason For Variance:	The 6 year renewal proposal, which includes 2020, was based on a targeted dollar amount. 2020 original projections (approved by project staff) were based the 2018 response rate and 2018 actuals. Estimated under-run is due to the change in study protocol in response to COVID19 with all but 50% of the enhanced FTFe cases approved for mode change to TEL, stopping SSA linkage consent, and changing SAQ to be administered via mail with a phone follow-up.

Projections
May 31, 2020

Dollars Projected For Month:	1,002,725.06
Actual Dollars Used:	1,012,674.42
Variance (Projected minus Actual):	-9,949.36
Reason For Variance:	Hours charged to COVID charged during the month of May was the contributing factor to the over-run in May.

Measures

	Units Complete	RR	HPI
Current Goal:	4,486	19.4%	6.3
Goal at Completion:	17,070*	73.8%	7.4
Current actual:	4,060	17.6%	6.3
Estimate at Complete:	17,070	73.8%	7.4
Variance:	0	0	0

Other Measures   *including preferred mode web

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:*	1,433,860.00	*InDirect Budget:*	802,964.00	*Total Budget:*	2,317,801.68

Principal Investigator/Client	Kristine Ajrouch (Life Course Development Program, SRC) Toni Antonucci (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:*	Juan Carlos Donoso
	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:	05/01/2019	*Pretest Start:*	11/12/2019
Pretest End:	12/13/2019	*Recruitment Start:*	08/15/2019
Staffing Completed:	03/01/2021	*GIT Start:*	
SS Train Start:		*SS Train End:*	
DC Start:	04/01/2021	*DC End:*	11/30/2021

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)

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Report Period	May, 2020 (H&WB)	**Project Phase**	Planning
Risk Level	*Some Concerns*		

Monthly Update	The research team and SRO worked to finalize instrument translations. PI team delivered Arabic consent and assent for saliva collection.
	Project team is testing all English instruments in CTT. Most English have been signed off in CTT. Arabic translations for cognitive assessments, PMs and saliva collection and the main (proxy) instrument continue to be tested.
	Starting 5/8, the SRO project team suspended most of its activities related to the project, except for a small group of people focused on Blaise and ST development, who will continue to charge hours through June with the aim of

completing technical system development.

Due to the national health emergency caused by COVID-19, the PIs and SRO team decided to postpone training to the end of the summer and main data collection to the fall, however, the PIs are now thinking we might not be able to start data collection this year.

Special Issues

Areas of the SRO work on D-AMP where the original specifications used to create the SRO budget did not hold up as we started implementing the development phase of the project include:

• Respondents from the Social Relations Study sample are also required to complete the core survey, in addition to the previously planned cognitive assessments and physical measures. This change was disclosed during the kick-off meeting, but the hours per interview (HPI) projection for Social Relations respondents was not adjusted to reflect this change.

• SRO staff invested more time than anticipated during the development of the cognitive tests, and the tests were more extensive and more complex to program than SRO anticipated;

• The Arabic translation process required involvement of SRO staff, which was not anticipated, and it took longer to finalize.

• The need to conduct more sessions for pretest training than originally budgeted due to delay in receipt of final instruments (English and Arabic) as well as the CDR certification.

• The realization that the complexity of the data collection protocol would require five more days of production training than originally budgeted, as well as 8 hours for CDR certification

SRO notified the PI team of an increase of $25K in the projectd overrun including the following explanation:
The reasons for the increase in the projected direct cost overrun are explained below:

1.- Programming hours:

SRO Blaise programmers had to program a four hour survey in English and Arabic for pretest, which caused them to use most of the time projected for the duration of the project. Many of the cuts made to the cognitive assessment section have not been easy, because these removals impacted the delayed recall timers, which had to be reprogrammed.

There are also two additional instruments that had to be programmed after pretest (Proxy English and Arabic). While these instruments are similar to the main survey, there are lots of little programming changes (fills, first to third person, new social relations section, screen formatting) that imply multiple rounds of testing and bug fixing.

2.- Salary costs:

Taghreid Lovell was initially budgeted as a production assistant at approximately .6 FTE. A few months ago it became clear that Taghreid's involvement in translation and testing tasks as well as recruiting and training, so her projections were increased to a full FTE. A couple months ago, Taghreid was promoted to production manager, in part because of her amazing contributions to D-AMP. The current cost report reflects Taghreid's new salary.

3.- COVID Bank hours:

The COVID-19 bank of hours specified by U-M is being charged to shortcodes that employees would be charging if they were able to work, including sponsored projects. This is an allowable, though unanticipated, expense on our project. To date, 391 hours have been charged to D-AMP under the PT, EPSLA or FMLA shortcodes. These charges translate to $16,500 in direct costs.

As we agreed during our last meeting, except for Ian Ogden, nobody from the SRO project management team will be charging any hours (beyond those already worked in May) during the stoppage in operations. Ian is leading our technical development efforts and the goal is to complete Blaise and Survey Trak programming by the end of June.

Cost
May 31, 2020

Total Cost to Date (Direct + Indirect):	967,324.75
Estimated Cost at Completion (E$AC):	2,528,094.19
Total Budget:	2,317,801.68
Variance (Budget minus E$AC):	-210,292.51
Reason For Variance:	The additional days of interviewer training, additional core interview for Social Relations sample, additional programming time and project timeline shift has led to a projected overrun. This will be partially covered by the saliva collection supplemental funding. It is recommended that the budget be reassessed once data collection is underway to determine whether the initial assumptions used for budgeting are accurate. Additional delays brought on by the COVID-19 crisis also contribute to the projected overrun.

Projections
May 31, 2020

Dollars Projected For Month:		34,035.44
Actual Dollars Used:		41,941.70
Variance (Projected minus Actual):		-7,906.26
Reason For Variance:		Salary costs were slightly higher than projected (COVID hours)

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: 09/01/2018	***Pretest Start:***
Pretest End:	***Recruitment Start:*** 09/01/2019
Staffing Completed: 03/01/2020	***GIT Start:*** 04/14/2020
SS Train Start: 04/16/2020	***SS Train End:*** 04/26/2020
DC Start: 04/24/2020	***DC End:*** 11/30/2020

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

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Report Period	May, 2020 (HCDC, H&C)	**Project Phase**	Implementing

Risk Level   *Some Concerns*

Monthly Update   During May 2020, SRC activities included the following:
Task 1: Management, Budget and Work Plan
% Task Spent to Date
- Participated in biweekly project meetings with research team to discuss scope, cost projections and schedule.
- Reviewed/monitored project expenses. Revised and adjusted monthly projections.
- Monitored subcontracts, project invoicing and payments.
- Prepared and submitted quarterly activity report.
- Revised schedule for move to all-telephone interviewing.
- Prepared detailed cost and spending estimates for telephone only data collection
- IRB
o
o   Recalled amendment for early-start telephone due to change to all telephone.
o   Began work to update recruitment documents and began updates to documents and text for move to only telephone interviewing.
☐   Updated brochure text and submitted for translation changes
☐   Updated prenotification letters and concerns letters and submitted for translation changes
☐   See Questionnaire Design for updates to questionnaires
o   Updated amendment text for change to all telephone administration
- Continued work to update/revise manual chapters for Wave 2 training. Began to incorporate changes for all-telephone interviewing protocol
- Conducted rounds of scenario-based integrated testing of study instruments.
- Researched options for providing respondent tokens of appreciation under the all-telephone scenario.
- Communicated work scope changes to outside kitting contractor (DataForce); reviewed deliverables. Placed all work on hold and requested invoice.
- Reviewed Woodcock-Johnson data and investigated data issue; provided feedback to Tufts coding team on data use and interpretation.
- Updated questionnaire timing estimates based on revised telephone-only questionnaire specification

Task 2: Sampling
% Task Spent to Date
- Attended project meetings.
- Continued testing of updated preload data (Wave 1 data and results needed for the Wave 2 survey implementation).

Task 3: Questionnaire Development
% Task Spent to Date
- Incorporated questionnaire changes and question additions requested by research team.
- Updated specifications for questionnaire to remove all in-person components of data collection
- Began review of QxQs and appropriateness for revised questionnaire.
- Updated specifications for sample management system and reporting systems to remove all in-person components of data collection.
- Reviewed result and reporting codes and made changes as necessary for all-telephone data collection.
- Modified preload and postload specifications as needed; updated estimated respondent age to conform to new telephone project schedule.
- Reviewed and updated translations for revised questionnaire, brochure and recruitment materials.
- Continued integrated testing of all instruments.

Task 4: CAI Programming

% Task Spent to Date
- Continued programming changes and updates to PCG interview.
- Incorporated preload and postload elements to all instruments.
- Began working on bug fixes in coverscreen and PCG instruments.

Task 5: Systems Programming
% Task Spent to date
- Reviewed new specifications for telephone-only data collection. Assessed programming needs.
- Modified field management application (Webtrak) to remove in-person components of data collection.
- Conducted instrument testing.
- Prepared test sample lines; formatted preload data for instruments

Tasks 6, 7: Interviewer Recruitment & Hiring, Training
91% Task Spent to Date
•
- Negotiated settlement with conference facility for cancellation of in-person training.
- Negotiated settlement with recruitment contractor (Headway) for contract for interviewers hired for in-person training.
- Continued discussing plans and technology for conducting synchronous training for telephone interviewers. Reviewed best practices and "lessons learned" from other projects.
o Began specification for technical support of on-line training.

Task 8: Main Data Collection
% Task Spent to Date
- Logged and data entered address updates for returned respondent cards. Processed respondent payments. Re-mailed cards as necessary.
- Conducted in-depth locating activities for sample members with undeliverable mail. Conducted telephone outreach to sample persons, logged results.

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

Areas of Concern (changes shown in italics):

Wave 2

•   The implementation of the Emergency Family and Medical Leave Expansion Act and the Families First Coronavirus Response Act will increase project costs. These are Federal and University-authorized project charges to cover lost work due to family care or inability to work due to the pandemic.

•   The project will be delayed due to the coronavirus epidemic. The extent of the delay is unknown, and may impact interviewer retention, both new hires and on-staffers. The delay will impact project cost due for additional questionnaire and sample management system programming changes, as well as ongoing management costs.

•   The PI has requested recontact of all Wave 1 households, including households where no children were interviewed, and the full population sample. Funding for fielding the full sample has not yet been identified.

•   The PCG questionnaires (in-area and out-of-area) for Wave 2 were not finalized by Aug 9. SRC added resources to allow us to meet revised questionnaire specification and IRB schedule for Wave 2, leading to increased costs over what is currently projected. This also reduced or eliminated any flexibility to accommodate further scope modifications.

•   Programming hours for fundamental structural changes to the Wave 2 PCG instrument, the addition of a household screener/exit interview, in addition to changes to the finalized household screener/exit interview that were announced in November 2019 after final specifications had been delivered and programming started. This additional effort may exceed the budget, which assumed only 25% programming change between Waves.

•   High interviewer attrition at Wave 1 and one year delay of data collection will require either that the project hire more new interviewers at Wave 2 than planned if we continue with a full in-person data collection protocol (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.

•   The delay in the data collection field period from 2019 to 2020 will increase fixed costs associated with project and production management. Delays will also impact hourly rates for all staff including data collection staff, may lead to increased locating costs, and will likely impact the number of new hires needed.

•   Delays in the start of respondent contact/locating efforts may lead to more intensive locating needs during the Wave 2 data collection, over and above what has been budgeted.

Wave 2 Work Scope Changes:

•   Notification of new specifications for State Data Consent forms received on February 9th, requiring revising and reprinting forms, developmental costs, and revised IRB submissions.

•   Questionnaire Development – Budgets assumed that final clean copies of all instruments be delivered by early August 2019 to allow for review and programming specification delivery using assigned resources.

•   A household screener/exit interview has been developed and will be programmed to facilitate locating children who do not live with the Wave 1 PCG. The instrument will collect contact information for new PCGs (approved by PIs).

•   The start of Wave 2 was delayed until April/May 2020 at the request of the research team. This will impact the cost of pre-production, respondent locating, and likely also impact the cost of interviewer hiring and training.

•   The sample size is being increased to include the full Wave 1 sample, including households where no children were interviewed at Wave 1.

•   The start of Wave 2 is being further delayed by the coronavirus pandemic. This will negatively impact project costs unless there are other offsets. Moving to an exclusively telephone data collection mode may reduce costs, but will also result in fewer completed interviews, both at the household level (due to lower response rate) and individual level (no child assessments). In addition, many of the measures cannot be collected over the phone, including laser tape measurement, physical measures, dried blood spots, interviewer household observations, neighborhood observations, or administration of the Social Security Administration or records-matching forms.

Cost
Jun 08, 2020

Total Cost to Date (Direct + Indirect):	9,606,423.92
Estimated Cost at Completion (E$AC):	11,847,494.90
Total Budget:	11,843,058.00
Variance (Budget minus E$AC):	-4,436.90
Reason For Variance:	The work scope is being adjusted to fit within the available budget. At present, in-person interviewing has been dropped, and only telephone interviewing, and mail data collection will be conducted.

Projections
Jun 08, 2020

Dollars Projected For Month:	107,666.48
Actual Dollars Used:	83,720.61
Variance (Projected minus Actual):	23,945.87
Reason For Variance:	Programming that was projected did not happen during May. The programming was back-burnered due to the assumption of a more lengthy delay in data collection, as well as competition from other projects for limited programming resources. Other team members were unexpectedly called to work on other projects as well, reducing the total labor worked on H&C.

Measures

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

Other Measures

Project Name	HRS 2019 Consumption and Activity Mail Study (CAMS 2019)
Project Mode	Primary: Mail Total of Modes: 1

Project Type	Sponsored Projects	**Project Status**	Current

Budget	**Direct Budget:** 305,282.00	**InDirect Budget:** 109,901.56	**Total Budget:** 415,183.56

Principal Investigator/Client	David Weir (ISR-SRC)
Funding Agency	NIH
IRB	**HUM#:** HUM00079949 **Period Of Approval:** 2/14/2019 - 2/13/202
Project Team	**Project Lead:** Anna Fuqua-Smith
	Budget Analyst: Grace Tison
	Production Manager:
	Senior Project Advisor: Nicole G Kirgis
	Production Manager: Jennifer C Arrieta
	Production Manager: Daniel Tomlin
Proposal #:	no data
Description:	CAMS is part of the Health and Retirement Study (HRS). The goal of CAMS is to gather additional data on household consumption and activities of daily living from participants in the HRS. In 2019, a paper questionnaire will be mailed to approximately 8,000 respondents of which 6,000 will receive the full questionnaire and 2,000 spouse/partners will receive a brief questionnaire.
SRO Project Period	05/2019 - 05/2020
Data Col Period	09/2019 - 04/2020
Security Plan	NA
Milestone Dates	

PreProduction Start:	05/01/2019	**Pretest Start:**	
Pretest End:		**Recruitment Start:**	
Staffing Completed:		**GIT Start:**	
SS Train Start:		**SS Train End:**	
DC Start:		**DC End:**	04/30/2020

Other Project Team Members:	Data Manager: Tim Wright Programmer: Ashwin Dey Project Assistant: Janet McBride, Debra Heier
Other Project Names:	CAMS
Sample Mgmt Sys	Other (Weblog)
Data Col Tool	SAQ
Hardware	Paper and Pencil
DE Software	Other (HRS study staff is responsible for)
QC Recording Tool	N/A
Incentive	Yes, R; Yes, Other (Spouse)
Administration	NA
Payment Type	Check, prepaid ($25 to main R and $10 to spouse R)
Payment Method	Check through other system (Submit excel file to business office)

Report Period	May, 2020 (CAMS 2019)	**Project Phase**	Closing
Risk Level	On Track		
Monthly Update	General summary for monthly activities: - Cost monitoring - Logging and shipping of returned questionnaires to project staff on hold until staff back in the Ann Arbor office		
Special Issues	N/A		

Cost
Jun 30, 2020

Total Cost to Date (Direct + Indirect):	470,366.38
Estimated Cost at Completion (E$AC):	397,920.96
Total Budget:	415,183.56
Variance (Budget minus E$AC):	17,262.60
Reason For Variance:	Higher rate of voids projected for project overall based on lower response rate and number of cashed checks to date.

Projections
Jun 30, 2020

Dollars Projected For Month:	295.09
Actual Dollars Used:	610.86
Variance (Projected minus Actual):	-315.77
Reason For Variance:	Variance due to postage that hit the project as well a few additional staff hours above what had been projected.

Measures

	Units Complete	RR	HPI
Current Goal:	5,778	67%	
Goal at Completion:	5,778	67%	
Current actual:	4,613	58%	
Estimate at Complete:		58%	
Variance:		9%	

Other Measures

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

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, 2020 (HRS - LHMS Spring 2019) **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	Activity for May 2020 --Updated projections and prepared cost reports and reports --Worked on final reports
Special Issues	It is unclear as to when Coding work for LHMS will begin.

Cost
Jun 30, 2020

Total Cost to Date (Direct + Indirect):	460,027.00
Estimated Cost at Completion (E$AC):	546,664.00
Total Budget:	691,201.00
Variance (Budget minus E$AC):	144,536.00
Reason For Variance:	Very low response rates and a truncated telephone protocol led to lower than anticipated costs.

Projections
Jun 30, 2020

Dollars Projected For Month:	2,567.45
Actual Dollars Used:	6,860.98
Variance (Projected minus Actual):	18,781.98
Reason For Variance:	We took advantage of some unexpected staff time to complete project management documentation on the project.

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:			
Current actual:			
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: 16,938.00	Total Budget: 186,301.00	

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:*   04/2018-01/2021

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 - 12/2021
Data Col Period   03/2019 - 11/2021
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:* 11/30/2021	

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

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, 2020 (HRS-Neuro)	**Project Phase**	Implementing

Risk Level   *Some Concerns*

Monthly Update   [Project Status] Pilot remains in "Some Concerns" status.

[Data Collection Hiatus Extended] Data collection activities were suspended as of 3/14/2020. As of early-June, 2020 a

decision has been confirmed that non-final respondents will participate first in HRS 2020, then HCAP 2020, then be considered for reactivation in the Neuroimaging Pilot. As the HCAP 2020 production launch has been pushed back to early-2021, the Neuroimaging Pilot will be effectively closed out until early 2021.

Projections will soon be updated to reflect this interim closeout of the project through February, 2021, anticipating a tentative re-launch of activity in March, 2021 and re-launch of data collection in April, 2021.

Re-launching in early-2021 means that, in effect, the first portion of the Neuromaging Pilot can be considered an HRS 2018-2020 off-year project, while the re-launch, though a continuation, can be considered an HRS 2020-2022 off-year project. This may result in some considerations prior to the re-launch.

The Project Dates and Data Collection dates in MPR have been updated to reflect these tentative revisions to the project schedule.

[Interim Data Delivery] SRO has been asked to begin some data-delivery tasks, including compiling and calculating some respondent demographic data to be merged into the database of the imaging data repository at the University of Southern California Laboratory of NeuroImaging (USC-LONI). This work will be done (for participants thus far) prior to the hiatus.

[Other Pre-Hiatus Tasks] Several other management tasks will take place prior to the hiatus, including an update to the Neuroimaging Production Report, ensuring remaining QC issues in data-entry from imaging sites are resolved and facilitating return of imaging site and interviewer laptops.

Special Issues

(1) [New] Successfully re-launching this pilot after signfiicant time and HRS activity have taken place; impacts on sample, pilot infrastructure (e.g. imaging site availabilty) unknown.

(2) [Ongoing] Determining appropriate effort / yield when relying on self-managing partner sites over whose practices and operations we have little-to-no leverage;

(3) [Ongoing] Ensuring effective monitoring in the absence of coordinating center staff with clinical expertise;

(4) [Ongoing] Examining success of pilot in involving underrepresented groups (as compared with a volunteer-sample)

Cost
May 31, 2020

Total Cost to Date (Direct + Indirect):	197,426.38
Estimated Cost at Completion (E$AC):	221,520.93
Total Budget:	186,301.00
Variance (Budget minus E$AC):	-35,219.93
Reason For Variance:	(Most Recent Contributors First)

[New, as of 06/2020]

Some ongoing management hours have been required, as well as effort needed to help support some previously-out-of-scope work (i.e. preparing to merge respondent demographic data into imaging data repository).

All data collection and most managment activities have been on hiatus since mid-March. Several staff have charged hours from their COVID / EPSLA banks to the Neuroimaging Pilot. Specific costs for these charges aren't known, but we understand all Interviewer hours charged in April-May (~60) were COVID / EPSLA hours.

[Previously Reported]

January, 2020: Per SRC-HRS team, PDMG management hours will be shifted to HCAP 2020 from 1/1/2020, reducing the projected overrun to ~$37,000. Additional funds to cover this balance are pending.

December, 2019: SRO projections updated once again to reflect an approximate doubling of the pilot study sample (~$26,000 of the projected overrun).

August, 2019: SRO projections updated to reflect extension of the data collection period (~$36,000 of projected overrun)

Projections
May 31, 2020

Dollars Projected For Month:	1,825.54
Actual Dollars Used:	-1,140.34
Variance (Projected minus Actual):	2,965.88
Reason For Variance:	Projections in May had been previously updated to reflect hiatus and interim closeout tasks. Costs for month were negative (surplus) due to a $2,200 credit from previous check voids hitting in May, 2020.

Ignoring the one-time void-credit, costs for the month were $1,059.66 or $765.88 below projections. This is largely due to fewer-than-projected ongoing maintenance hours (e.g. hours projected for SPA, ST DBA, but none charged).

Measures

	Units Complete	RR	HPI
Current Goal:	105	50.0%	1.0
Goal at Completion:	[pending]	[pending]	[pending]
Current actual:	32	19.2%	1.62
Estimate at Complete:	[pending]	[pending]	[pending]
Variance:	[pending]	[pending]	[pending]

Other Measures

As of 6/12/2020 (following mid-March suspension of all data collection activities):
[SRO Recruitment Rate - Goal] - 90.0%
[Projected SRO Recruitment Rate] - 55.0% (126 recruited / 229 finalized)
[Projected Completion / Scan Rate] 19.2% (32 completed / 167 finalized across recruitment & scanning phases).

Project Name	HRS Off Year Mail Survey 2019 (OYMS 2019)
Project Mode	Primary: Mail Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects

Project Status	Current

Budget	*Direct Budget:* 857,251.00	*InDirect Budget:* 361,169.00	*Total Budget:* 1,218,420.00

Principal Investigator/Client	David Weir (ISR/SRC) Helen Levy (ISR/SRC) Jacqui Smith (ISR/SRC)
Funding Agency	
IRB	*HUM#:* HUM00168761 *Period Of Approval:*
Project Team	*Project Lead:* Daniah Buageila *Budget Analyst:* Grace Tison *Production Manager:* Russell W Stark *Senior Project Advisor:* Nicole G Kirgis *Production Manager:* Jennifer C Arrieta *Production Manager:*
Proposal #:	no data
Description:	OYMS is part of the Health and Retirment (HRS). The goal of OYMS is to gather additional data on health and life history from participants in the HRS. In 2019, a paper questionnaire will be mailed to approximately 13,000 respondents of which 6,500 will be sent the health survey, and the other 6,500 the life history survey. Telephone follow-up will be conducted in the SSL with a sub-set of LHMS non-responders. HUM00168761 is for the Health Survey HUM00106904 is for the Life History Mail Survey
SRO Project Period	06/2019 - 05/2020
Data Col Period	10/2019 - 04/2020
Security Plan	NA

Milestone Dates		
PreProduction Start:		*Pretest Start:*
Pretest End:		*Recruitment Start:*
Staffing Completed:		*GIT Start:*
SS Train Start: 11/15/2019		*SS Train End:* 11/15/2019
DC Start: 10/21/2019		*DC End:* 05/01/2020

Other Project Team Members:	Non-Response Project Manager: James Koopman Programmer: Ashwin Dey Data Manager: TBD Project Assistant: Janet McBride, Debra Heier
Other Project Names:	OYMS
Sample Mgmt Sys	Other (Weblog)
Data Col Tool	SAQ
Hardware	Paper and Pencil
DE Software	External vendor (DataForce)
QC Recording Tool	N/A
Incentive	Yes, R
Administration	N/A
Payment Type	Check, prepaid ($25)
Payment Method	Check through other system (Excel sheet to business office)

Report Period	May, 2020 (OYMS 2019)

Project Phase	Implementing

Risk Level	*Some Concerns*
Monthly Update	Logging and shipping of returned questionnaires on hold until reduction of in-office staff due to COVID19. DataForce continues to scan the LHMS questionnaires received. The PIs and Dataforce have finalized the health survey schema so scanning of completed questionnaires will begin in June. Health Survey RR: 83% LHMS Questionnaire only protocol RR: 38%

LHMS Non-response protocol RR: 12%

Special Issues

Multiple funding agencies
HRS project staff has informed that they will not be ready to provide the data to SRO for LHMS coding until end of 2020 or early 2021

Cost
May 31, 2020

Total Cost to Date (Direct + Indirect):	782,536.28
Estimated Cost at Completion (E$AC):	784,627.53
Total Budget:	1,218,420.00
Variance (Budget minus E$AC):	433,792.47
Reason For Variance:	Under-run due to much lower response rate than budgeted for the LHMS survey, lower HPI for non-response follow-up in SSL as fewer Rs completed the questionnaire over the phone than budgeted. In addition the HRS PI decision to stop all contact attempt efforts with HRS Rs 8 weeks prior (rather than in past of "at least a month") to data collection meant we cut the timeline for calling short.

Projections
May 31, 2020

Dollars Projected For Month:	10,544.00
Actual Dollars Used:	-1,002.51
Variance (Projected minus Actual):	12,263.54
Reason For Variance:	Dataforce has not started scanning completed health questionnaires. Projections have been updated for these accordingly.

Measures

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

Other Measures

Project Name	India Human Development Survey Wave 3 (IHDS3)
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects

Project Status Current

Budget   ***Direct Budget:***   333,895.61   ***InDirect Budget:***   198,006.92   ***Total Budget:***   531,902.53

Principal Investigator/Client
Sonalde Desai (University of Maryland)
Stephanie Chardoul (University of Michigan)
Santanu Pramanik (National Council of Applied Economic Research)

Funding Agency   National Institutes of Health, Department of Health and Human Services

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

Project Team
Project Lead:	Gina-Qian Yang Cheung
Budget Analyst:	Carl S Remmert
Production Manager:	
Senior Project Advisor:	Stephanie A Chardoul
Production Manager:	Sarah Elisa Broumand
Production Manager:	Jennifer M Kelley

Proposal #:   no data

Description: The India Human Development Survey (IHDS) is a nationally representative, multi-topic, longitudinal survey of 41,554 households in 1503 villages and 971 urban neighborhoods across India. The first round of interviews were completed in 2004-5; data are publicly available through ICPSR. A second round of IHDS reinterviewed most of these households in 2011-12 (N=42,152). SRC joins IHDS Wave 3 to automate data collection, the scope of work includes methodological design, sample design, questionnaire design, technical instrument design, supervisor/interviewer training, production monitoring, quality control, data dissemination, and 2-3 weekly conference calls for capacity building.

SRO Project Period   01/2019 - 05/2022
Data Col Period   06/2020 - 05/2022
Security Plan   NA
Milestone Dates

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:
Project Management Team
Stephanie Chardoul -- Senior Project Advisor (SPA)
Gina Cheung - Lead Project Manager and Tech Lead
Sarah Broumand - Project Manager
Jennifer Kelley - Project Manager

Programming Team
Collette Keyser - Blaise
Marsha Skoman - SurveyTrak
Holly Ackerman - WebTrak
Ashwin Dey - Offline Transfer
Cheng Zhou - Sync

HelpDesk Team
Genise Pattullo
Emmanuel Ellis
Andrea Pierce

Data Manager Team
Jonathan Harrison
Matthew Scibiorski

DBA Team
LihShwu Ke
Cheng Zhou

Other Project Names:

Sample Mgmt Sys	Other (SurveyTrak INTL)
Data Col Tool	Blaise 5
Hardware	Laptop; Other (NCAER Phone (In India))
DE Software	Other (TBD)
QC Recording Tool	DRI-CARI
Incentive	Yes, Other (TBD)
Administration	Other (TBD)
Payment Type	Other (TBD)
Payment Method	Other (TBD)

Report Period	May, 2020 (IHDS3)	**Project Phase**	Implementing

Risk Level   *On Track*

Monthly Update

The project continues to be in pre-production phase. The Household Income and Social instrument, Tracking instrument, and Roster instrument are programmed and testing is underway in CTT. Programming and testing has also started for the Health and Education instrument and the Community (Village) instrument. There is a working version of the Household SurveyTrak project and the specs should be finalized in the next week. The basic structure of the SurveyTrak Village project is in place and will be updated as the client provides more details. Integration testing is in its third round (internally) and next week (6/15) the client will also start integration testing. The team continues to meet frequently with the client to document all project requirements and design decisions. The project's management team is meeting weekly with TSG to keep the staff informed with the project design, coordinate effort, and to report out on progress.

Special Issues

There are several concerns, with the foremost as the timeline, given the size and complexity of the project. The other concerns include:

● Receiving timely CRQs and translations from the client
○ Mitigation: Created a timeline and shared with the customer. Reminding client frequently about time sensitive do-outs.

● SRO staffing - this is the largest and one of the most complex projects and there is concern about having enough staff to fully support the project
○ Mitigation:
■ The Field User Management tool was develop to give the NCAER staff more responsibilities for certain data management tasks
■ Continue to working closely with NCAER to keep the timeline on track to avoid unnecessary rework

Technical infrastructure : Due to the size of the project some of our tool will need to be more robust to handle large transfers of data at one time.
○ Mitigation:
■ Developed the FUM tool to reduce burden on International Terminal Server
■ Enhanced the Sync Management

Cost
May 31, 2020

Total Cost to Date (Direct + Indirect):	247,413.00
Estimated Cost at Completion (E$AC):	650,336.06
Total Budget:	531,902.53
Variance (Budget minus E$AC):	79,566.47
Reason For Variance:	Budget has increased to $729,902.53 due to the Gates3 Fund. This is reporting a positive Variance. Not all the hours have been allocated yet to all the staff.

Projections
May 31, 2020

Dollars Projected For Month:	25,847.52
Actual Dollars Used:	27,609.04
Variance (Projected minus Actual):	-1,761.52
Reason For Variance:	The variance appears to be negative but it is only because a new source of funding was added an projections had not been updated yet. $55K was used under the new funding source (Gates).

Measures

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

Other Measures

Project Name	Monitoring the Future - Base Year 2017-2022 (MTF base year 2017-2022)
Project Mode	Primary: Class SAQ Total of Modes: 1
Project Type	Sponsored Projects

Project Status   Current

Budget	*Direct Budget:*	4,701,300.00	*InDirect Budget:*	2,615,631.00	*Total Budget:* 7,316,931.00

Principal Investigator/Client	Richard Miech (Survey Research Center)
Funding Agency	
IRB	*HUM#:* 00131235 *Period Of Approval:* 4/18/2019 - 4/17/20
Project Team	*Project Lead:* Rebecca Gatward
	Budget Analyst: Mary Johnson
	Production Manager: Barbara Aghababian-Homburg
	Senior Project Advisor: Gregg Peterson
	Production Manager: Margaret Lavanger
	Production Manager: Lloyd Fate Hemingway
Proposal #:	no data
Description:	The Monitoring the Future study is an epidemiological and etiological research project begun in 1975. The project functions as a basic research study, as well as one of the nation's major sources of reliable information on trends in smoking, drinking and drug use.

It is based on two interconnected series of surveys using nationally representative samples:
(a) self-administered annual in-school surveys of 8th, 10th, and 12th graders (about 15,000-17,000 in about 140 8th grade schools, about 120 10th grade schools and about 125 12th grade schools per year);
(b) panels of high school graduates aged 19-30, 35, 40,45, 50, 55, and 60 (surveyed by mail). Panel members aged 19-30 are sent a questionnaire every other year/asked to complete a web survey and the older sample members are sent questionnaires (mail and web) at five-year interval. The MTF panel study has three parts - early in the year a locating effort targets panel members who ....
The web panel launches in spring and around June a telephone non-response effort begins.

SRO Project Period	04/2017 - 04/2022
Data Col Period	02/2018 - 07/2022
Security Plan	Yes
Milestone Dates	

PreProduction Start: 04/30/2017		*Pretest Start:*
Pretest End:		*Recruitment Start:*
Staffing Completed:		*GIT Start:*
SS Train Start:		*SS Train End:*
DC Start:		*DC End:* 07/30/2022

Other Project Team Members:	DRAFT - Hueichun Peng, Timothy Wright, David Bolt, Debre Heier,
Other Project Names:	
Sample Mgmt Sys	SurveyTrak; Project specific system (SurveyCTO)
Data Col Tool	Other (SurveyCTO)
Hardware	Tablet
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, Other (Honorarium paid to school by MT project staff)
Administration	ISR Group (MTF project team)
Payment Type	NA
Payment Method	Check through other system

Report Period	May, 2020 (MTF base year 2017-2022) **Project Phase** Initiation
Risk Level	*On Track*
Monthly Update	May updates

- All but one IWER have now returned their assigned tablets to Ann Arbor. This process went very smoothly.
- We are working with the MTF (SRC) team to develop a plan for 2021 data collection - no decisions yet, except that

we will provide a web option for students to complete the base year survey online.

Special Issues

Cost
Jun 08, 2020

Total Cost to Date (Direct + Indirect):	4,892,185.62
Estimated Cost at Completion (E$AC):	7,552,272.84
Total Budget:	7,316,931.00
Variance (Budget minus E$AC):	-235,341.84
Reason For Variance:	- Wave 1 (2017-18) & Wave 2 (2018-19) - 50 supplemental school admins (not budgeted) - Wave 2 travel costs were higher than budgeted due to staff availability. - Wave 3 (2019-2020) - 500 additional tablets were purchased. The cost of these and other necessary equipment was not budgeted.

Projections
Jun 08, 2020

Dollars Projected For Month:	137,822.65
Actual Dollars Used:	97,210.05
Variance (Projected minus Actual):	40,612.60
Reason For Variance:	The difference is due to the uncertainty about how many hours would be charged to the COVID-19 'banks' available to interviewers. I was cautious when projecting IWER hours for the remainder of May - including the max. hours that could still be charged by MTF IWERs (~2,000). Around half of these hours were charged in May.

Measures

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

Other Measures

Project Name	Monitoring the Future Panel (web) non-response and locating efforts (MTF Panel (2017-2020))
Project Mode	Primary: Telephone
Project Type	Sponsored Projects

Project Status   Current

Budget	***Direct Budget:***	39,068.70	***InDirect Budget:***	21,878.07	***Total Budget:*** 2,138,186.00

Principal Investigator/Client   John Schulenberg (UM - Survey Research Center)

Funding Agency

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

Project Team	***Project Lead:***	Lloyd Fate Hemingway
	Budget Analyst:	Mary Johnson
	Production Manager:	Lloyd Fate Hemingway
	Senior Project Advisor:	Gregg Peterson
	Production Manager:	Lloyd Fate Hemingway
	Production Manager:	

Proposal #:   no data

Description: DRAFT - this is a 'new' project added in June 2020 by Rebecca - awaiting further details from the Project Manager (Lloyd)

SRO Project Period   01/2017 - 10/2020
Data Col Period
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:
Other Project Names:

Sample Mgmt Sys	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	May, 2020 (MTF Panel (2017-2020))	**Project Phase** Implementing

Risk Level   *On Track*

Monthly Update   TBC

Special Issues

Cost
Jun 30, 2020

Total Cost to Date (Direct + Indirect):	1,054,942.21
Estimated Cost at Completion (E$AC):	1,870,060.00
Total Budget:	2,138,186.00
Variance (Budget minus E$AC):	268,126.00
Reason For Variance:	(awaiting detail from Lloyd)

Projections
Jun 30, 2020

Dollars Projected For Month:	29,621.64
Actual Dollars Used:	16,840.14
Variance (Projected minus Actual):	12,781.50
Reason For Variance:	(awaiting detail from Lloyd)

Measures

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

Other Measures

Project Name	Monitoring the Future Web 2020 (MTF Web 2020)
Project Mode	Primary: Web Total of Modes: 1
Project Type	Sponsored Projects

Project Status   Current

Budget	*Direct Budget:*	606,400.00	*InDirect Budget:*	337,199.00	*Total Budget:* 943,599.00

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:*   Mary Johnson
- *Production Manager:*
- *Senior Project Advisor:*   Gregg Peterson
- *Production Manager:*   Rebecca Gatward
- *Production Manager:*

Proposal #:   no data

Description: This project is a continuation of MTF Illume Web 2019. The new budget has been combined with previous to allow for "additional funding" of the continiung portion and includes some development/programming work for 2021.

SRO will program and test six new survey versions, all will be programmed in Illume. The 6 "older" forms will be edited and tested. 12 Surveys will be launched in 2020. After testing is complete, SRO will launch the 2020 Web survey data collection with an estimated sample size of 16,500 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 2020 with the data collection taking place during a 7-month period, beginning April of 2020. The total cost for this work is estimated at $301,116 ($193,023 direct, $108,093 indirect), budgeted at the currently negotiated on-campus recovery rate of 56%.

SRO Project Period	01/2020 - 12/2020
Data Col Period	04/2020 - 10/2020
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:	Gregg Peterson (SPA), Rebecca Gatward (Director), Donnalee Grey-Farquharson, Hueichun Peng, Lloyd Hemingway, Shaowei Sun, Laura Yoder, Timothy Wright, Peter Sparks, Ashwin Dey
Other Project Names:	MTF Illume Web 2020
Sample Mgmt Sys	SMS; Web SMS; Project specific system (RLM, RIMS)
Data Col Tool	Illume
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, 2020 (MTF Web 2020)	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update   Production continues to go well. Current RR is 35.16%

MTF Staff is adding a new survey and additional sample to the MTF Web study. They would like to add another replica of ~2500 cases to the 2020 panel in production. This new sample consists of 12th graders who completed the baseline survey in 2020 that had complete name and mailing addresses or email addresses. This new sample will be invited to complete a new survey/form to be programmed in Illume by Study Staff and tested by SRO. The data collection protocol will remain the same as current sample with the exception that this new sample will not be offered a paper option at any point. They will receive invitation letter, email, text message, reminder emails and reminder calls (non-response calling). The invitation email will be different from the current panel and will specifically refer to COVID-19. We will use some of the currently approved reminder panel emails for this group.

SRO is working on a supplemental budget to accommodate this additional work.

SRO will give input to the IRB amendment that will be submitted by MTF Staff.

Special Issues

Cost
May 31, 2020

Total Cost to Date (Direct + Indirect):	655,397.44
Estimated Cost at Completion (E$AC):	859,475.56
Total Budget:	943,599.00
Variance (Budget minus E$AC):	84,123.44
Reason For Variance:	Includes an under-run carried over from 2019. project just loaded and projections need to be updated.

Projections
May 31, 2020

Dollars Projected For Month:	19,706.08
Actual Dollars Used:	24,254.40
Variance (Projected minus Actual):	-4,548.32
Reason For Variance:	Slightly off on projected hours

Measures

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

Other Measures

Project Name	National Data Innovation Centre -- Delhi Metropolitan Area Study (NDIC DMAS)

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

Project Type Sponsored Projects   **Project Status** Current

Budget *Direct Budget:* 409,329.00   *InDirect Budget:* 40,932.00   *Total Budget:* 450,261.00

Principal Investigator/Client Sonalde Desai (University of Maryland)
Stephanie Chardoul (University of Michigan)
Santanu Pramanik (National Council of Applied Economic Research)

Funding Agency Bill & Melinda Gates Foundation

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

Project Team *Project Lead:*   Gina-Qian Yang Cheung
Budget Analyst: Carl S Remmert
Production Manager:
Senior Project Advisor: Stephanie A Chardoul
Production Manager:
Production Manager:

Proposal #: no data

Description: The main objective of NCAER-NDIC is to serve as a laboratory for experiments in data collection, interfacing with partners in think tanks, Indian and international universities, and government. In particular, the Centre will address problems with existing data streams and important data currently not collected; foster, incubate, mainstream, and increase uptake of data innovations; and improve the triangulation and compatibility of distinct but related datasets. SRC joins NCAER-NDIC to launch Delhi Metropolitan Area Study, including baseline (N=5,255; HH-level, FtF), monthly (N=2,387, R-level; TEL), quarterly (N=2,700, HH-level, FtF), hospitalization follow-up (N=TBD, HH-level, FtF), and midline (N=5,255; HH-level, FtF) surveys (22 surveys in total) within ~20 months data collection period. SRC scope of work is to enhance NCAER-NDIC staff skills through formal and informal training and through the building of a broader collaborative network, including methodological design, sample design, questionnaire design, technical instrument design, supervisor/interviewer training, production monitoring, quality control, data dissemination, and 2-3 weekly conference calls for capacity building.

SRO Project Period 08/2018 - 10/2020
Data Col Period 01/2019 - 09/2020
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: Andrea P. (Help Desk), Ashwin D. (SurveyTrak Intl), Brad G. (Data Management), Christopher G. (Data Management), Colette K. (Blaise), Emmanuel E. (Help Desk), Gina C. (Tech Lead), Holly A. (WebTrak), Jay L. (Project Management), Jonathan H. (Data Management), LihShwu K. (DBA), Marsha S. (SurveyTrak Intl), Rama G. (Sync), Stephanie C. (SPA)

Other Project Names:

Sample Mgmt Sys Other (SurveyTrak INTL)
Data Col Tool Blaise 5
Hardware Laptop; Other (NCAER Phone (In India))
DE Software N/A
QC Recording Tool N/A
Incentive Yes, Other (TBD)
Administration Other (National Council of Applied Economic Research)
Payment Type Other (TBD)
Payment Method Other (TBD)

Report Period	May, 2020 (NDIC DMAS)	**Project Phase**	Implementing

Risk Level *On Track*

Monthly Update The project is on hold due to India's country is locked down.

Special Issues

Cost
Jun 10, 2020

Total Cost to Date (Direct + Indirect):		361,329.00
Estimated Cost at Completion (E$AC):		380,000.00
Total Budget:		450,261.00
Variance (Budget minus E$AC):		-70,000.00
Reason For Variance:		Project on hold right now

Projections
Jun 10, 2020

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

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:	Maureen Joan O'Brien
Budget Analyst:	Nancy E Oeffner
Production Manager:	Theresa Camelo
Senior Project Advisor:	Nicole G Kirgis
Production Manager:	
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:	William Lokers--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, 2020 (NSFG 2010-2020) **Project Phase** Closing
Risk Level	On Track
Monthly Update	We are in the post-production phase for NSFG Cycle 8. Data collection ended September 11, 2019. The contract end date is 12/30/2020. Currently, two main efforts are, 1. SRO and ICPSR coordination for PUF4 delivery, and 2. NSFG project closeout activities including compiling deliverables for NCHS as outlined in the contract, disabling daily batch processes and systems as able, organizing files and databases, and planning a timeline for shutting down servers and the secure FSEC environment. At this time, closeout activities and PUF4 delivery activities are still on track. Regarding the SQL Anywhere server in FSEC update, we have not received word yet from CDC whether or not we will need to update this. The server had been outdated for a few years, and all requests for waivers to CDC to update had been granted, until fall, 2019, when the request was denied. After CMT and SRO project management

discussed this with CDC, the CMT Director reapplied for the waiver, stating that we are in the final year of data collection and there are currently no remote users accessing the server. SRO has put together a cost estimate in the event that the waiver request is denied again. CDC has not yet reached a decision on the update. The cost of the update was worked into the post-production budget, but the SRC PI has discussed other options to cover the costs of this update as well. Regarding the NSFG closeout budget, we are currently projecting a total of $24,000 total underrun for the Post-production budget.   This will increase by approximately $10,000 if the CDC doesn't require us to update the SQL Anywhere server. Some hours will be added for assistance with PUF delivery from SRO Data Mgr, as well as additional hours for reviewing files and documents in FSEC for PII. We will likely still experience an underrun. The NSFG RFP for the next 10-year contract has been released and work on the proposal is underway. It is due to NCHS on 7/10/2020.

Special Issues

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

Cost
Jun 30, 2020

Total Cost to Date (Direct + Indirect):	45,075,393.00
Estimated Cost at Completion (E$AC):	45,688,961.00
Total Budget:	41,101,388.47
Variance (Budget minus E$AC):	6,000.00
Reason For Variance:	The total NSFG budget with all approved contract mods is actually $45,682,579. 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
Jun 30, 2020

Dollars Projected For Month:	0.00
Actual Dollars Used:	11,056.16
Variance (Projected minus Actual):	-11,056.16
Reason For Variance:	Overrun was $19k. After taking account of a $13k underrun from year 10, the final project overrun was $6,000. Regarding monthly costs, no costs were projected for the month, while some costs continued to come in and hit the project which is why there was a monthly overrun.

Measures

	Units Complete	RR	HPI	
Current Goal:	1550	68%	10.0	
Goal at Completion:	5500	79%	10.0	
Current actual:	1509	64%	11.9	
Estimate at Complete:	4	61.8%	10.3	
Variance:	28	18.2%	.3	

Other Measures

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

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:	08/05/2019	***GIT Start:***	09/16/2019
SS Train Start:	09/18/2019	***SS Train End:***	09/23/2019
DC Start:	10/01/2019	***DC End:***	11/30/2020

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

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Report Period	May, 2020 (CDS-19) **Project Phase** Implementing
Risk Level	*Some Concerns*
Monthly Update	Stats as of 6/13 FPR: Coverscreen - 3015 completes (3590 lines) PCG - 904 completes (3036 lines) Child - 1587 completes (5603 lines) Other adult - 355 completes (2784 lines) May marked the wrap-up of PCG and Adolescent Iw work. The only work continuing into June is IVR follow-up (in the

Field for 4903s and in the SSL for 1001s). A handful of CS, PCGs, Child, and Adolescent iws were completed after their respective deadlines due to outreach from Rs who still wanted to participate.

End Game Summary:
CS end game ($20 incentive). End date (4/19) announced on 4/2. Ended interviewer-initiated Coverscreen interviewing on 4/19.
PCG interview end game (additional $50) and end date (5/10) announced on 4/9.
Adolescent interview end game (additional $15) and end date (5/31) announced on 4/23. A $20 gatekeeper token for PCGs was also offered.
IVR end game ($15). End date 6/21.

Special Issues

The Fall Restart will be completed under these shortcodes. Pre-production work is underway, with a planned, mid-Sept production launch. The end date listed below has been updated to reflect the planned end of the Restart data collection period.

Cost
May 31, 2020

Total Cost to Date (Direct + Indirect):	7,245,775.12
Estimated Cost at Completion (E$AC):	8,976,310.24
Total Budget:	8,965,959.00
Variance (Budget minus E$AC):	-10,351.24
Reason For Variance:	Projections for fall Restart effort were added this month. When these were first added, before May costs hit, we still projected a total cost underrun of $96,656.59. May COVID costs were high enough to push us into an overrun.

Projections
May 31, 2020

Dollars Projected For Month:	447,678.38
Actual Dollars Used:	563,566.23
Variance (Projected minus Actual):	-115,887.85
Reason For Variance:	Monthly variance is mostly due to COVID time, which we were not projecting. Beginning with the May cost report we are projecting actual, incurred COVID time that has yet to be reflected in the report but is certain. No COVID time beyond that is projected.

Measures

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

Other Measures

Project Name	Qatar World Mental Health Survey (WMH-Qatar)
Project Mode	Primary: Face to Face Total of Modes: 1
Project Type	Sponsored Projects

Project Status   Current

Budget	*Direct Budget:*	62,440.00	*InDirect Budget:*	12,488.00	*Total Budget:* 74,928.00

Principal Investigator/Client	Zeina Mneimneh (University of Michigan) Salma Mawfek Khaled (Qatar University)
Funding Agency	Cambridgeshire and Peterborough NHS Foundation Trust
IRB	*HUM#:* *Period Of Approval:*
Project Team	*Project Lead:* Sarah Elisa Broumand *Budget Analyst:* Carl S Remmert *Production Manager:* *Senior Project Advisor:* Gina-Qian Yang Cheung *Production Manager:* *Production Manager:*
Proposal #:	no data
Description:	SRC joins Social & Economic Survey Research Institute at Qatar University for the upcoming World Mental Health Study in Qatar to conduct CIDI train-the-trainer training and build a quality assurance tool. The timing expectation is that SRC has an initial working version of the QC tool in time for a January 2020 data collection pilot, then refinements will be made for an October 2020 production launch. The Qatar team will be using the standard CIDI questionnaire instrument (Blaise 5), and they have Blaise programming expertise and their own sample management system. SRC had originally envisioned this as a version of our OLAP Cube, but have since moved away from that and toward a more "ODS"-type approach. SRC scope of work includes CIDI training, methodological designs for in-person and phone call verification, quality control indicators/interventions, and technical designs for quality assurance infrastructure and dashboard, etc.
SRO Project Period	04/2019 - 10/2021
Data Col Period	01/2020 - 10/2021
Security Plan	NA

Milestone Dates

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:	Cheng Z. (Application Programmer), Jay L. (PM), Gina-Qian C. (SPA), Sarah B. (System Analyst)
Other Project Names:	
Sample Mgmt Sys	Other (Blaise 5)
Data Col Tool	Blaise 5
Hardware	Laptop; Tablet
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, Other (TBD)
Administration	Other (Qatar University)
Payment Type	Other (TBD)
Payment Method	Other (TBD)

Report Period	May, 2020 (WMH-Qatar)	**Project Phase**	Implementing
Risk Level	*On Track*		
Monthly Update	The Qatar project continues with last months momentum. The team is meeting every two weeks with the client to review all the progress both teams have made in. The SRO team helped the Qatar IT team streamline the process to release the entire system into production as well as finish up the remaining indicators that have been under review for final design. SRO performed detailed analysis on Response and completion rates based on the pilot data to help the client identify ways to understand interviewer and sampling issues during the production phase of the project.		

Special Issues   None

Cost
Jun 30, 2020

Total Cost to Date (Direct + Indirect):	48,011.48
Estimated Cost at Completion (E$AC):	74,150.78
Total Budget:	74,928.00
Variance (Budget minus E$AC):	777.22
Reason For Variance:	Variance is minimal. Work come in waves, so things balance out at the end.

Projections
Jun 30, 2020

Dollars Projected For Month:	2,109.98
Actual Dollars Used:	1,253.42
Variance (Projected minus Actual):	856.56
Reason For Variance:	Variance is minimal.

Measures

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

Other Measures

Project Name	Relationship Dynamics & Social Life Study, Re-contact Test (RDSL Recontact)
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 25,284.00 **InDirect Budget:** 0.00 **Total Budget:** 25,284.00
Principal Investigator/Client	Jennifer Barber (ISR)

Funding Agency	Internal PI funds	
IRB	**HUM#:** HUM00014150 **Period Of Approval:** 12/11/07-No CR	
Project Team	**Project Lead:** Rebecca Loomis	
	Budget Analyst: Carl S Remmert	
	Production Manager: Pooja Varma-Laughlin	
	Senior Project Advisor: Shonda R Kruger-Ndiaye	
	Production Manager:	
	Production Manager:	

Proposal #:	no data
Description:	This project seeks to determine the feasibility of obtaining current contact information for respondents who were part of the Relationship Dynamics & Social Life Study (RDSL), and the success of an outreach effort asking these respondents to complete a short, web-based instrument to confirm or update their address, telephone number and email. The original study, also known as the Michigan Study of Young Women, was conducted in 2008-2009 with approximately 1,000 women aged 18-22 residing in Genesee County, Michigan. This is an attempt to locate and re-contact a sample of 100 cases in order to test the feasibility of a survey of the entire original survey sample. Data collection will run for 7 weeks, beginning with the mailing of a pre-notification letter with a $2 incentive to the 100 case sample, along with an email and text invitation, as appropriate. Email and manual text reminders will be sent, weekly to non-final lines with appropriate contact information. SSL interviewers will attempt to contact by phone all cases that have not responded to the letters, email or texting. Respondents who complete their interviews will be sent $10 checks.

SRO Project Period	10/2019 - 04/2020
Data Col Period	02/2020 - 04/2020
Security Plan	NA
Milestone Dates	

PreProduction Start: 11/30/2019		**Pretest Start:**
Pretest End:		**Recruitment Start:**
Staffing Completed:		**GIT Start:**
SS Train Start: 03/05/2020		**SS Train End:** 03/05/2020
DC Start: 02/19/2020		**DC End:** 05/31/2020

Other Project Team Members:	Dan Zahs, batch locating and sampling
Other Project Names:	RDSL
Sample Mgmt Sys	Web SMS
Data Col Tool	Illume
Hardware	Desktop; [UM cell] Phone; Other (Rs' devices for self-admin Web completes)
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post ($10); Cash, prepaid ($2)
Payment Method	Check through other system (ISR RPay System (not STrak)); Imprest Cash Fund from ISR Business Office (ISF

Report Period	May, 2020 (RDSL Recontact) **Project Phase** Implementing
Risk Level	*Some Concerns*
Monthly Update	May: This month's work consisted of more intensive focus on a randomly-selected subset of 10 sample lines. SRO had been concerned that, prior to May, the PI had requested SRO to try many new pieces of contact information at the expense of trying our best available info multiple times. The May focus on the subset of SIDs was intended to test the effectiveness of more intensive work. 3 phone calls were made to all phone numbers for these lines. Individual

Accurint look-ups were made. Leads generated were pursued. Finally, an end of study email and text message were sent, specifying an end date.

April: SSL interviewer shifts were paused for one week mid-month to allow PI staff to pursue new leads through social media; this effort did not yield results. Next steps have been discussed, including manual accurint searches for selected cases and extending data collection through May. We have prepared a cost estimate for this additional work scope. The PI would like to see results of these efforts to determine the feasibility of additional individual searches.

March: As the PI and her staff pursue their efforts at additional locating through social media, we attempt to maintain the balance of keeping the project up and running without overextending the budget. In March, the project's 3 SSL interviewers transitioned to working from home. We are keeping their time to a minimum, scheduling very few hours and working with the PI and her staff to strategize the best use of their time. We continue to use a shadow spreadsheet of contact information. We have agreed to an extended data collection period through April.

Feb: Data collection began Feb 19th. The PI and her staff decided to undertake their own locating efforts after sample was loaded and production launched. Significant SRO work went into determining a workflow that would incorporate a (potentially unlimited) number of additional new leads. We're now maintaining a shadow spreadsheet of contact information and having iwers call, text, and email off lists. Call records are still being recorded in the project Web SMS. Interviewer training occurred 2/27 (texting via SideSync) and 3/5 (calling). The project budget is insufficient for the work the PI is requesting. We're trying to control scope appropriately.

Special Issues

Cost
May 31, 2020

Total Cost to Date (Direct + Indirect):	25,727.00
Estimated Cost at Completion (E$AC):	26,288.00
Total Budget:	25,284.00
Variance (Budget minus E$AC):	-1,004.00
Reason For Variance:	We're currently projecting an overrun of $1,004 (or approx. 4%). Due to approved workscope changes, the PI is expecting and has authorized an overrun of $1,000 - $2,000.

Projections
May 31, 2020

Dollars Projected For Month:	1,687.00
Actual Dollars Used:	1,922.00
Variance (Projected minus Actual):	-235.00
Reason For Variance:	May actuals overran by $235. The biggest driver was unprojected R incentives hitting. It's unlikely we will need the full $100 in R tokens we have projected for June.

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:	80	80%	
Current actual:	58	58%	
Estimate at Complete:		58%	
Variance:		22	

Other Measures

Note: the goals reflected above are based upon conversations with the PI post-proposal. The proposal materials did not specify a target RR. As of April, PI is mentioning a desire for an 85% RR to assist with future funding. Goal specified above has not been updated. It's clear that we will not be able to achieve a response rate of either 80 or 85%. Our best estimate is currently 57%.

Production Measures reported are through 6/13/20.

Project Name	Study to Assess Risk and Resilience in Servicemembers - Longitudinal Study Supplement (STARRS-LS Supplement)
Project Mode	Primary: Not Available

Project Type	Sponsored Projects		**Project Status**	Current	
Budget	*Direct Budget:* 410,256.00	*InDirect Budget:* 229,744.00		*Total Budget:*	640,000.00

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:*	9/4/2019 - 9/3/2020

Project Team

Project Lead:	Meredith A House
Budget Analyst:	William Lokers
Production Manager:	
Senior Project Advisor:	Lisa S Holland
Production Manager:	Ryan Yoder
Production Manager:	Lisa M Lewandowski-Romps

Proposal #: no data

Description: The STARRS-LS Supplement budget is for the scope of two tasks during the period April 2019 through June 2020. Task 1 is to prepare and load de-identified survey data and project documentation for the STARRS-LS study into the ICPSR public use holdings for Army STARRS. This work will cover the entire 15-month project period. Task 2 is to extend support for project management and U-M STARRS Data Enclave activities for seven months beyond the November 30, 2019 funding end date for the current STARRS-LS award. Task 2 work will include the period December 2019 through June 2020.

SRO Project Period 04/2019 - 06/2020
Data Col Period
Security Plan Yes
Milestone Dates

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

Other Project Team Members: Kelsey Mulka, Lamont Manley, Stephanie Windisch
Other Project Names:

Sample Mgmt Sys	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	May, 2020 (STARRS-LS Supplement)	**Project Phase**	Implementing
Risk Level	*On Track*		
Monthly Update	See monthly update for STARRS-LS		
Special Issues	See monthly update for STARRS-LS		

Cost
Apr 30, 2020

Total Cost to Date (Direct + Indirect):	333,121.00
Estimated Cost at Completion (E$AC):	654,102.00
Total Budget:	640,000.00
Variance (Budget minus E$AC):	-14,103.00
Reason For Variance:	We spent a total of $134,399 in April. With the additional projections, we are showing a projected overrun of $14,103.

Projections
Apr 30, 2020

Dollars Projected For Month:	141,634.00
Actual Dollars Used:	134,399.00
Variance (Projected minus Actual):	7,234.00
Reason For Variance:	Slightly lower Enclave and Public use expenses.

Measures

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

Other Measures

Project Name	Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study (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:** 9/4/2019 - 9/3/2020

Project Team

Project Lead:	Meredith A House
Budget Analyst:	William Lokers
Production Manager:	Ruth B Philippou
Senior Project Advisor:	Lisa S Holland
Production Manager:	Juan Carlos Donoso
Production Manager:	Lisa M Lewandowski-Romps

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 - 03/2020
Data Col Period	10/2015 - 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:	Heather Schroeder, Paul Burton, Ryan Yoder, Leah Roberts, Keith Liebetreu, Kelsey Mulka, Madison Goforth, Lamont Manley, Stephanie Windisch, Youhong 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, 2020 (STARRS-LS) **Project Phase** Implementing
Risk Level	On Track
Monthly Update	☐ We completed budget close-out activities for STARRS-LS Years 1-5. The final underrun on these accounts is $3,607. ☐ We continued using the supplement award for Wave 3 pre-production work. ☐ We provided a third round of cost details, requested by the USUHS contracts specialist, for STARRS 3 budget lines.

□   We received verbal approval from the GSC for the Wave 3 design change (removal of phase 5).

□   We received a formal memo from Scott describing the ODUSA's request to the research team for an SSN list for obtaining IRS addresses from NIOSH. We prepared a background memo for discussion with the U-M IRB, but put that on hold while Scott reconsiders adding AAG to the process.

□   We reinstated work on the installation/set-up of newly purchased enclave equipment (previously put on hold due to the COVID-19 situation).

□   We continued work on biomarker group requests for assistance, and analyst requests for assistance.

□   We halted work on posting construct files to the enclave after it was discovered that four IDs in the SSN/Linkage ID list that U-M provides to AAG for administrative data linking were missing administrative data in recent AAG pulls (whereas they had found matches to admin data during Army STARRS). U-M launched a detailed investigation into where erroneous IDs/SSNs may have been introduced into the SSN/Linkage ID list.

□   We received NDI output data from the CDC and transferred it to our secure consent enclave. We worked with Harvard on enclave data directory structure and data deliverable format.

□   We were available for questions from ICPSR while they worked on the Wave 2 public release, and changes to the Wave 1 diagnostic algorithms.

□   We awaited signature/approval from the Army to reduce the security level of the ICPSR public data by moving data access from the Virtual Data Enclave (VDE) to the "Secure Download" option (called IDARS - ICPSR Data Access Request System).

□   We started gathering file information for GWAS and other assay data so that we can re-initiate discussions with ICPSR about the possibility of publicly releasing the biomarker/assay data through ICPSR (as an alternative or additional option to NDA).

□   We made progress on pre-production activities for Wave 3 including submitting the Wave 3 IRB application on May 4 and providing responses to administrative review comments on May 28.

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

□   NIOSH addresses

o   The ODUSA has secured CDC approval and funding to obtain the addresses, but it is still not clear how the previously understood barriers and restrictions on obtaining and sharing the data have been resolved. The May 6 memo provided by Scott did not describe the specific steps, process or individuals who would handle the SSN list or the NIOSH addresses. That memo will not be put forward as Scott is reconsidering adding AAG to the process. While involving AAG is probably the most likely way to gain IRB approval, we have yet to see how the process will be described in an updated memo.

o   What is known is that we do not have permission to reveal the identities of participants to the Army. Further, we do not have permission from the full 72,000 to use their SSNs for locating (outside of Army databases). We have only gathered this type of consent from LSW1 and LSW2 respondents. We are concerned about this situation as it potentially leaves the study (U-M in particular) in a situation to have to say "no" and it would look like we are resistant to helping obtain the addresses. We have no objections to obtaining them as long as it can be done in a way that honors STARRS commitments to privacy and data security as provided to our respondents. The ultimate plan will also need to be one that is likely to receive U-M IRB approval.

□   Wave 3 Challenges

o   Currently, the primary risks to an October 2020 launch are the following:

□   Funding delays. While it is very positive that we received approval to start Wave 3 work on the supplement sub-award and the start of Wave 3 pre-production activities has not been delayed, it is important to establish the new STARRS 3 sub-award as soon as possible, so that these activities are not interrupted.

□   Wave 3 consent review and approval process. We submitted the consent protocol on May 4 to the U-M IRB and await their review. Risks still remain in that we may not receive approval of the DSA modification request in time; we may not establish a VA PI in time; and, as it looks like we will not receive VA prior approval, we could employ a VA HIPAA authorization form that ends up not being acceptable to the VA "down the road."

o   HIPAA authorization cannot be provided verbally during CATI interviews. We are currently fleshing out detailed procedures for telephone interviews. It is uncertain how successful gaining the HIPAA consents for CATI respondents will be.

o   In implementing a cumbersome consent battery, our response rates are likely to go down for both web and phone interviews.

□   Enclave Support

o   We continue to monitor priorities for Enclave support. We balance the primary Enclave support work with a number of more complex biomarker data support requests, which are outside of the reduced Enclave team scope in the STARRS-LS contract. We prioritize the primary work above other requests in accordance with project goals and to remain within budget/scope. As a result, the biomarker data support requests can take longer to service. As long as requestors are ok with this arrangement, we can continue to manage the work and priorities in this fashion.

□   Scope additions

o   There are a few cost estimates for new scope that have yet to be made (Table 6 above). As decisions are made, we will work with the research team to schedule and implement this work.

o   We have received 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
Apr 30, 2020

Total Cost to Date (Direct + Indirect):	12,778,571.64
Estimated Cost at Completion (E$AC):	12,831,092.00
Total Budget:	12,834,699.00
Variance (Budget minus E$AC):	3,607.00
Reason For Variance:	After final reconciliation and close-out processing, our final underrun for the Years 1 through 5 STARRS-LS accounts is $3,607. The Financial Status Report (closeout report) was submitted.

Projections
Apr 30, 2020

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	Last month was our last month to focus on charging ongoing work to the 5-year no cost extension

Measures

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

Other Measures

Project Name	Surveys of Comsumer Attitudes (SCA 2020)			
Project Mode	Primary: Telephone	Total of Modes: 1		
Project Type	Sponsored Projects		**Project Status**	Current
Budget	***Direct Budget:*** 1,109,882.00	***InDirect Budget:*** 0.00	***Total Budget:***	1,109,882.00
Principal Investigator/Client	Richard Curtin (SCA) tUBER sUZER-gURTEKIN (sca)			

Funding Agency		
IRB	***HUM#:***	***Period Of Approval:***
Project Team	***Project Lead:***	Theresa Camelo
	Budget Analyst:	Dean E Stevens
	Production Manager:	Ruth B Philippou
	Senior Project Advisor:	Shonda R Kruger-Ndiaye
	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	12/2019 - 12/2020
Data Col Period	12/2020 - 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:	04/22/2020	***DC End:***	05/26/2020

Other Project Team Members:	
Other Project Names:	
Sample Mgmt Sys	NA
Data Col Tool	Blaise 4.8
Hardware	Desktop
DE Software	NA
QC Recording Tool	DRI-CXM; Live monitoring
Incentive	Not used
Administration	N/A
Payment Type	N/A
Payment Method	N/A

Report Period	May, 2020 (SCA 2020)	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update May SCA began as scheduled on April 22, 2020, and ended two days later than scheduled on Tuesday, May 26th (SCA May was originally scheduled to end data collection on Sunday, May 24th, but at the request of the PIs dialing was cancelled on Sunday, May 26th, the SSL was closed for Memorial Day on Monday, May 25th, and ended instead on Tuesday, May 26th (which was originally planned to be a non- dial day between the May and June study months). We completed 641 interviews in May (343 RDD, 187 RECON, and 111 R12s), surpassing both the original goals of 600 (320/180/100) and modified goals of 635 (340/188/107) at an overall HPI of 2.96 (.04 lower than the budgeted HPI

of 3.0).

Special Issues

Cost
Jun 12, 2020

Total Cost to Date (Direct + Indirect):	81,167.88
Estimated Cost at Completion (E$AC):	81,167.88
Total Budget:	1,109,882.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	Lower HPI and no NH training.

Projections
Jun 12, 2020

Dollars Projected For Month:	92,490.17
Actual Dollars Used:	81,167.88
Variance (Projected minus Actual):	-11,322.29
Reason For Variance:	Lower HPI and no NH training.

Measures

	Units Complete	RR	HPI
Current Goal:	635		3.0
Goal at Completion:	641		2.96
Current actual:	641		2.96
Estimate at Complete:	641		2.96
Variance:			

Other Measures

Project Name	Transition Into Adulthood Supplement (TAS2019)

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

Project Type	Sponsored Projects		**Project Status** Current

Budget	**Direct Budget:** 778,487.00	**InDirect Budget:** 428,167.00	**Total Budget:** 1,206,654.00

Principal Investigator/Client	Narayan Sastry (ISR)

Funding Agency

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

Project Team	**Project Lead:**	Piotr Dworak
	Budget Analyst:	Megan Gomez-Mesquita
	Production Manager:	Carlos Andres Macuada Lopez
	Senior Project Advisor:	Stephanie A Chardoul
	Production Manager:	Daric Thorne
	Production Manager:	Anthony Romanowski

Proposal #:	no data

Description:	TAS 2019 is the 8th Wave of TAS study, part of the PSID Suite of projects.

Approximately 3,500 youth aged 18 – 28 years who are part of families who participate in the ongoing Panel Study of Income Dynamics (PSID) are invited to take part in a 60-minute survey. Eighty percent of respondents (approximately 3,000) will be offered an option to complete the survey either online or by phone. A fifth of respondents will be offered only the option of completing the survey by phone. As in TAS 2017 and 2018, all respondents will be offered a up to $100 for completing the interview. Phone interviews will be completed by Survey Research Center Survey Services Lab (SSL) interviewers.

SRO Project Period	07/2019 - 08/2020
Data Col Period	11/2019 - 06/2020
Security Plan	NA
Milestone Dates	

PreProduction Start: 08/01/2019	**Pretest Start:**
Pretest End:	**Recruitment Start:** 11/14/2019
Staffing Completed:	**GIT Start:**
SS Train Start:	**SS Train End:**
DC Start:	**DC End:** 06/30/2020

Other Project Team Members:	
Other Project Names:	Transition Into Adulthood Supplement
Sample Mgmt Sys	MSMS
Data Col Tool	Blaise 5
Hardware	Desktop; [UM cell] Phone
DE Software	NA
QC Recording Tool	Camtasia
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post ($70)
Payment Method	Check through other system (PSID RAPS)

Report Period	May, 2020 (TAS2019)	**Project Phase**	Implementing

Risk Level	On Track

Monthly Update	Project updates:

TAS finished week 31 of data collection 38 weeks will be needed to meet the response rate goals (timeline consistent with 2017) extending the project through the end of July. TAS is currently @ 79.2% completion rate (est. 80% RR). TAS team now includes 8 Field interviewers who work assigned sample via phone on remote workstations in SSL. TAS continues to refine non-response strategies. We have issued +$30 additional payments to all non-respondents. We continue refining emailing and texting strategies. TAS is sending additional postcard and gearing up for sending

non-monetary tokens of appreciation to respondents who suspended a survey.
"

Data collection / Sample:

Completion rate 79.2% represents 2377 completes within 3005 released sample and estimated 80% RR. Mixed mode sample 1964 (81% CR / 82% RR). Phone Only sample 415 (72% CR / 73% RR).

Staffing:
17 SSL interviewers (including TLs). Added 9 Field staff trained 4/21. One field attrition leaves us with 8 field iwers.

Technical system:

TAS is documenting improvements to apply to the 2021 and like projects.

Finances:

TAS is making final adjustments to extend project through July. The current TAS overrun is still less than an estimated combined effort of SSL + Field. Addition of field was projected separately and prsented to the PIs at the onset of the project.

Special Issues

Cost
Jun 05, 2020

Total Cost to Date (Direct + Indirect):	993,966.97
Estimated Cost at Completion (E$AC):	1,220,566.76
Total Budget:	1,206,654.00
Variance (Budget minus E$AC):	-13,912.76
Reason For Variance:	Added field interviewers, extended project timeline/staff through June.

Projections
Jun 05, 2020

Dollars Projected For Month:	134,380.61
Actual Dollars Used:	136,238.88
Variance (Projected minus Actual):	-2,393.66
Reason For Variance:	Postage for new mailings.

Measures

	Units Complete	RR	HPI
Current Goal:	2279	.76	8.6
Goal at Completion:	2637	.89	
Current actual:	2268	.75	11.0
Estimate at Complete:	2637	.89	
Variance:			

Other Measures

Project Name	Vaping Project (Vaping Project)
Project Mode	Primary: Web

Project Type	Sponsored Projects		**Project Status**	Current	
Budget	*Direct Budget:* 111,862.00	*InDirect Budget:* 62,642.00		*Total Budget:*	174,504.00

Principal Investigator/Client

Funding Agency

IRB	*HUM#:*		*Period Of Approval:*	
Project Team	*Project Lead:*	Peter Rakesh Batra		
	Budget Analyst:			
	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 (MTF) Base Year study. Using a starting sample of approximately 1,900 respondents from MTF, SRO will administer a data collection "burst" consisting of one 30-minute survey and 14 days of 7-minute surveys. SRO will conduct all surveys as self-administered web surveys. SRO will coordinate all electronic contact with respondents (email and text message), but will not handle any paper mailings, telephone non-response respondent follow-up, or the payment of respondent incentives. SRO's involvement will last for 12 months starting in April 2020, with the data collection between September and December 2020. 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	05/2020 - 11/2020
Data Col Period	08/2020 - 10/2020
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:	Hueichun Peng
Other Project Names:	
Sample Mgmt Sys	Web SMS
Data Col Tool	Illume
Hardware	NA
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, Other (MTF Team making Tango or check payment)
Administration	SRO Group
Payment Type	NA
Payment Method	NA

Report Period	May, 2020 (Vaping Project)	**Project Phase**	Initiation
Risk Level	*On Track*		

Monthly Update	We have continued getting specifications for changes to the Web SMS and been working with the MTF Project team to help finalize the IRB and questionnaire. The plan is still to test our processes in late June/ earlyJuly and begin data collection in mid to late August. The MTF group has submitted the IRB application.
	One hold up could be the SRC bio-specimen lab. It's unclear at the moment if they will not be able to begin accepting specimens because they don't have the correct collection cards to send out or if their staff won't be allowed in the

office for processing until cleared to do so. Even though SRO is not involved in this piece of the respondent collection activity, the PI would like to closely time the data collection (survey) with bio-specimen collection. In other words, if the bio-specimen collection can't happen until later into Fall 2020, then it may delay when we start the survey collection period.

Special Issues

Cost
Jun 10, 2020

Total Cost to Date (Direct + Indirect):	5,196.04
Estimated Cost at Completion (E$AC):	174,504.00
Total Budget:	174,504.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	This is using a contingency account, so the cost data not yet fully available. It's been delayed another month, so hopefully by next month will be resolved.

Projections
Jun 10, 2020

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

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:			
Current actual:			
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:
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 08/2019 - 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:	10/29/2019	**DC End:**	

Other Project Team Members:	Kallan Larsen - PSM MS Student
	Ai Rene Ong - PSM PhD Student
	Tianheao Wang - PSM MS Student
	Kevin Jensen (TSG) - portal/Blaise programming
	Shanti Suresh, Matt Hanger, & Laura Yoder (TSG) - data management
	Kyle Goodman - MSMS set-up programming
	Jim Rodgers - MSMS consultation
	Brady West - Research Associate Professor, Survey Research Center
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 (CloudResearch (TurkPrime))
Payment Type	Cash, prepaid ($2); Other (ABS=$2 giftcode -> prepaid; $20/$22 giftcode -> post)
Payment Method	Imprest Cash Fund from ISR Business Office; Other (TurkPrime (now CloudResearch))

Report Period	May, 2020 (VCT)	**Project Phase**	Closing

Risk Level — *On Track*

Monthly Update

Tian has come on the project for the summer as her PSM internship (SRO VCT funds are paying her). Tian and Kallan will be doing the bulk of analysis moving forward.

An interviewer debriefing was held at the beginning of May. We used an analysis meeting time with the research team to meet with the interviewers. We used the data from debriefing instrument Kallan programmed as a basis for the discussion. We recorded the debriefing in Blue Jeans. Kallan set-up the meeting as was away in May. When she returns we will have her use NVivo to transcribe the recording to text. The interviewer brought us some useful information to use in the future publications.

The team has officially pre-registered the project via OSF. DOI 10.17605/OSF.IO/2VMX4

We are working with ITS to make sure we have Blue Jeans data for the cases that we are expecting. We've identified a set of Blue Jeans IDs that we used where ITS did not provide any Blue Jeans data. We are in the process of identifying another set of cases where they gave us data, but there is a mismatch (e.g., we used a BJID 4 times and they either gave us 4 records and there is a date mismatch on some, or there is a date is missing (they provided 3 of 4) altogether).

Neil works data questions related to ad hoc requests/questions from the research team.

Andrew met with Dean to update cost projections. Overall we are projecting to be about right on target (projecting a slight overrun on both budgets). Most time is currently being charged against the MiCDA funding. Those funds need to be spent by the end of June.

We learned of possible additional MiCDA funding, but it wouldn't be available until January of 2020. We will likely submit for more funds for analysis.

Special Issues

Cost
Jun 30, 2020

Total Cost to Date (Direct + Indirect):	318,859.67	
Estimated Cost at Completion (E$AC):	377,556.68	
Total Budget:	377,455.00	
Variance (Budget minus E$AC):	-101.68	
Reason For Variance:	VM costs are on target. We are currently trying to spend down the MiCDA funds. The summer intern time did not hit in May as expected. Those projections will be moved forward to June.	

The cost information for the MiCDA funds currently are:
Total Budget: $54,207
Total Cost to Date: $51,705.67
Estimated cost at completion: $54,847.34
Variance: $-640.34

Projections
Jun 30, 2020

Dollars Projected For Month:	23,058.32
Actual Dollars Used:	12,586.12
Variance (Projected minus Actual):	10,472.20
Reason For Variance:	The summer intern doing analysis charged her time to the wrong account. She is correcting her timesheet. We communicated with ITS about missing Blue Jeans data. Neither of those costs happened in May. Those costs have been moved forward to June.

Projections on MiCDA:
Dollars Projected: $3,038.41
Dollars Used: $3,674.40
Variance: $-635.99

Measures

	Units Complete	RR	HPI
Current Goal:	855	20%	
Goal at Completion:	855		
Current actual:	1,109	12.5%	
Estimate at Complete:			
Variance:			

Other Measures