Survey Research Operations

Monthly Project Report

Sponsored

October 2020

Select Calendar Year 2020 ▾

Click the month to pull up Project Monthly report for the month for that project type.
Click the Project Name to pull up Project Monthly Archive Report for the Project. [i]

NonArchived Sponsored Projects

Project	Type	Status	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
ACL6	Sponsored	Current	🟡	🟡	🟡	☐	🟡	🟡	🟡	🟡	🟡	🟡
ACL-LIFE	Sponsored	Current	☐	☐	🟢	🟢	🟢	🟢	🟢	🔴	🟡	🟡
AFHS	Sponsored	Current	🟡	🟡	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
ALS Controls	Sponsored	Current	☐	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢
BFY	Sponsored	Current	🟡	🟡	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
C.A.R.E.	Sponsored	Current	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟢	🟢	🟢
CBII	Sponsored	Current	☐	☐	☐	☐	☐	☐	☐	☐	☐	🟢
CDS-19	Sponsored	Current	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
DAWN CS	Sponsored	Current	☐	☐	☐	☐	☐	☐	☐	☐	☐	🟢
ECHO	Sponsored	Current	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🔴	🔴	🟡
EDCPE	Sponsored	Current	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
EDC-Semi Structured	Sponsored	Current	☐	☐	☐	☐	☐	☐	☐	☐	☐	🟢
H&WB	Sponsored	Current	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
HCAP 2020	Sponsored	Current	☐	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
HCDC, H&C	Sponsored	Current	🟡	🟡	🟡	🟡	🟡	🟡	🟢	🟢	🟢	🟢
HRS 2020	Sponsored	Current	🟡	🟡	🟡	🟢	🟡	🟡	🟡	🟡	🟡	🟡
HRS 2020 ABT	Sponsored	Current	☐	☐	☐	☐	☐	☐	☐	☐	🟡	🟡
HRS-Neuro	Sponsored	Current	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
IHDS3	Sponsored	Current	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
MARS 2	Sponsored	Current	☐	🟢	🟢	☐	🟢	☐	☐	🟢	🟢	🟢
MTF base year 2017-2022	Sponsored	Current	☐	☐	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
MTF Panel (main data collection) 2020	Sponsored	Current	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
MTF Vaping Project	Sponsored	Current	☐	☐	☐	🟢	🟢	🟢	🟢	🟢	🟢	🟢
NSFG 2010-2020	Sponsored	Current	🟢	☐	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
SCA 2020	Sponsored	Current	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
STARRS-LS Supplement	Sponsored	Current	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
STARRS-LS Waves 3 & 4	Sponsored	Current	☐	☐	☐	☐	☐	☐	☐	☐	🟢	🟢
VCT	Sponsored	Current	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
WMH-Qatar	Sponsored	Current	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢

Sponsored Projects

(ACL-LIFE) ACLLIFE Life History Interview and Validation (ACLLIFE)
(ALS Controls) ALS Matched Control Recruitment
(AFHS) American Family Health Study
(ACL6) Americans' Changing Lives - Wave 6
(BFY) Baby's First Years
(C.A.R.E.) Concussion Assessment, Research and Education (CARE) Consortium
(DAWN CS) Detroit Area Wellness Program - COVID Supplement
(ECHO) Environmental Influences on Child Health Outcomes
(EDCPE) Every Dollar Counts Program Evaluation
(EDC-Semi Structured) Every Dollar Counts Semi-Structured Interviews
(HCAP 2020) Harmonized Cognitive Assessment Protocol, 2020
(HRS 2020) Health and Retirement Study 2020
(H&WB) Health and Wellbeing in Southeast Michigan
(HCDC, H&C) Housing & Children
(HRS 2020 ABT) HRS 2020 COVID Antibody Test
(HRS-Neuro) HRS Neuroimaging Pilot
(IHDS3) India Human Development Survey Wave 3
(MARS 2) Malaysia Ageing and Retirement Study Wave 2
(CBII) Mellon College and Beyond II
(MTF base year 2017-2022) Monitoring the Future - Base Year 2017-2022
(MTF Panel (main data collection) 2020) Monitoring the Future Panel (web) 2020
(MTF Vaping Project) MTF Vaping Project
(NSFG 2010-2020) National Survey of Family Growth
(CDS-19) PSID Child Development Supplement V (2019)
(WMH-Qatar) Qatar World Mental Health Survey
(STARRS-LS Supplement) Study to Assess Risk and Resilience in Servicemembers - Longitudinal Study S
(STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study
(SCA 2020) Surveys of Comsumer Attitudes
(VCT) Video Communication Technologies in Survey Data Collection

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:	Pooja Varma-Laughlin

Proposal #:	no data
Description:	This project will conduct a Life History interview with the Americans' Changing Lives (ACL) panel by telephone using centralized SSL interviewers (and possibly Field interviewers, if necessary).

SRO Project Period	04/2020 - 08/2021
Data Col Period	02/2021 - 08/2021
Security Plan	NA
Milestone Dates	

PreProduction Start:	04/01/2020	***Pretest Start:***	
Pretest End:		***Recruitment Start:***	
Staffing Completed:		***GIT Start:***	
SS Train Start:	02/15/2021	***SS Train End:***	
DC Start:	02/22/2021	***DC End:***	08/23/2021

Other Project Team Members:	Shonda Kruger-Ndiaye: SPA Terri Ridenour: SRO Lead/Project Manager Grace Tison: Financial Analyst Pooja Varma-Laughlin: Production Manager Jeff Smith: Technical Lead TBD: Production Assistant Helen (Hongyu) Johnson: SSI Debra Heier: SSA (Project Coordination) Jeff Smith: SurveyTrak Programmer Ashwin Dey: WebTrak, Weblog Programmer Karl Dinkelmann: CAI Programmer-Blaise Carlos Macuada: Data Manager Chris Greene/Stephanie Windisch (ACL6 Data Managers): ACL-LIFE Data Management Consultants Andrea Pierce: Help Desk

Other Project Names:	
Sample Mgmt Sys	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop; Desktop
DE Software	Other (Weblog (Locating and Logging Returned Calendars))
QC Recording Tool	DRI-CARI; DRI-CXM; Live monitoring
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post ($30)
Payment Method	Check through STrak RPay System

- -

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

Risk Level — *Some Concerns*

Monthly Update

SRO's pre-production work continues. I meet weekly with the PI and provide consultations and ad hoc meetings with the study office staff (e.g. to discuss ACL protocols, locating requirements, sample updates, IRB application and preload preparation). I've also been meeting with the SSL production manager, project managers and tech team to develop systems used for data collection and prepare training.

Carlos Macuada joined our project as data manager this month. Chris Greene will continue to provide data management consultation and support, and will build the Respondent Profiles used during data collection.

On 10/29 we met with PI and team to discuss these calendar options for the Event History Calendar grid: https://docs.google.com/presentation/d/1xPpJemED3MgtYJTPMectSmpI015TfhSpSg8IPi3Xg_8/edit#slide=id.p1

We agreed on Option 3, which is the prototype Karl created. It includes a viable standalone instrument without the separate calendar grid callout the SHARE instrument had. After deliberating with the ACL-Life PI (Sarah), Karl (lead programmer) and team last week (11/12), we believe Karl will need an additional 6 weeks to program the Blaise instrument's calendar grid to meet the client's expectations and to complete integrated testing.

We're now targeting a February 22 data collection start date (and remote training sessions the week of February 15).

Special Issues

Although this was projected as an SSL project, it is likely it will be staffed by many Field Interviewers. We are uncertain about the response to the job posting and the number of on-staff SSL Iwers who will apply to work on ACL-LIFE. There would be budget implications if we cannot staff our team with SSL Iwers and instead must staff Field Iwers on the project.

Cost
Nov 16, 2020

Total Cost to Date (Direct + Indirect):	84,631.14
Estimated Cost at Completion (E$AC):	724,116.06
Total Budget:	734,193.00
Variance (Budget minus E$AC):	10,076.94
Reason For Variance:	We currently project a cost underrun. However, our future projections do not yet reflect any increase in time for programming the instrument – including the event history calendar functionality we discussed with the PI last week. We hope to get an updated estimate from Karl of the remaining Blaise programming hours needed. We'll use that estimate to gauge what additional funds may be needed to cover this work. (As we discussed with the PI, based on the programmer's currently loaded hourly rate [$75], an additional 200 programming hours, for example, would cost ~$15,000.)
	As work progresses this month and we identify interviewers to staff the study, we will be better able to project future costs. We are likely to see an overrun on iwer hours simply because our interviewers will likely be primarily Field staff at higher rates (vs. SSL staff budgeted).

Projections
Nov 16, 2020

Dollars Projected For Month:	36,968.88
Actual Dollars Used:	29,268.90
Variance (Projected minus Actual):	7,699.98
Reason For Variance:	The Blaise, SurveyTrak and Weblog programmers assigned to work on this project get pulled in many different directions, with competing priorities. Programming hours will shift to next month's cost report.

Measures

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

Other Measures

Project Name	ALS Matched Control Recruitment (ALS Controls)
Project Mode	Primary: Web

Project Type	Sponsored Projects		**Project Status**	Current	
Budget	**Direct Budget:** 193,780.00	**InDirect Budget:** 108,518.00		**Total Budget:**	302,298.00

Principal Investigator/Client	Steven Goutman (Univ of Michigan - Med School)
Funding Agency	
IRB	**HUM#:** HUM00148060 **Period Of Approval:**
Project Team	**Project Lead:** Rebecca Loomis
	Budget Analyst: Megan Gomez-Mesquita
	Production Manager:
	Senior Project Advisor: Peter Rakesh Batra
	Production Manager:
	Production Manager:
Proposal #:	no data
Description:	This is a web screening project that is mailing letters to an ABS sample of 15,000 HH's in the Midland and Grand Rapids area. The letter contains a link to a 5-10 minute Qualtrics survey that screens eligible Respondents for a study that includes a blood draw. SRO's involvement is only with the Respondent screening and incentive payment for completing the screening questionnaire.
SRO Project Period	01/2020 - 12/2023
Data Col Period	09/2020 - 10/2023
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:	Dan Zahs (Sampling)
Other Project Names:	
Sample Mgmt Sys	NA
Data Col Tool	Other (Qualtrics)
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, R
Administration	ISR Group (SRC Business Office)
Payment Type	Check, post (10)
Payment Method	NA

Report Period	Oct, 2020 (ALS Controls)	**Project Phase**	Planning
Risk Level	On Track		

Monthly Update	October: The first batch of 417 letters was mailed 10/21/2020. We have 9 Qualtrics screener completes so far; 6 token of appreciation checks have been mailed and 3 more are pending.
	September. Weekly check-in meetings with the PI/Project team have been set up. IRB approval for the amended documentation was received by the PI/Project Team and in the meantime we met with the project team to work on sampling questions and testing out the Qualtrics screening questionnaire. We are now on track to mail out the first batch of letters (n=417) to selected households at the end of October.
	August. After 2 years of initial efforts, ASL Controls is finally ready to begin and the project teams for SRO and Michigan Medicine were assembled. Sampling methods were discussed and parameters particular to the study goals

were agreed on, using an address based sample (ABS) through MSG. The letter to be sent to sample addresses was reviewed and revised. Additional screening questions of education, race, ethnicity, and gender were agreed to be added to the Qualtrics survey. These changes will need to be submitted in an amendment (being completed by the PI's team) to the IRB. U-M Printing Services will handle the printing, assembly, and mailing of the letters each month. Depending on IRB approval, and getting the sampling procedures finalized, the goal is to have the first batch of letters mailed by the end of September.

Special Issues

Cost
Nov 06, 2020

Total Cost to Date (Direct + Indirect):	6,221.10
Estimated Cost at Completion (E$AC):	164,017.38
Total Budget:	302,298.00
Variance (Budget minus E$AC):	138,280.62
Reason For Variance:	

We are still in the early phases of this project. We are also waiting for projected TSG hours to be charged.

Project just starting and runs over 36 months. It will take a few months to see how response rates are tracking and how many people are completing the blood draw (managed by the PI).

Projections
Nov 06, 2020

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	none

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	Oct, 2020 (AFHS)	**Project Phase** Implementing
Risk Level	*On Track*	
Monthly Update	October update - Still working to ensure all cases have a final 'result code'. - Mailing pre. process became faster, amount of returned mailed reduced,	
Special Issues	Response has been slow. We have encountered some severe mail issues due to the impact of the COVID pandemic on USPS.	

Cost **Nov 16, 2020**		
Total Cost to Date (Direct + Indirect):	1,168,948.32	
Estimated Cost at Completion (E$AC):	2,463,381.36	
Total Budget:	2,490,133.00	
Variance (Budget minus E$AC):	26,751.64	
Reason For Variance:	Total costs are lower than budgeted - Replicate 1 projections have been revised to be in line with the actual response rates - replicate 2 projections are still based on the target response rates - the sample size may be increased. To determine how much we can afford to increase the sample by, I will be adjusting Rep 2 costs in line with actuals for Rep 1 and then cost changes expected for Rep 2 and cost for additional sample (1,000 addresses initially). Cost of two printers (one ordered in error and the other did not meet needs of SSA) = $1,584 was charged to project. The amount will be refunded.	

Projections **Nov 16, 2020**		
Dollars Projected For Month:	78,457.94	
Actual Dollars Used:	57,611.22	
Variance (Projected minus Actual):	20,846.70	
Reason For Variance:	Respondent TOAs were over estimated (~$15,000), even after adjusting the projections last month.	

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:*** 495,251.00 ***InDirect Budget:*** 277,340.00 ***Total Budget:*** 772,591.00
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	Oct, 2020 (ACL6)	**Project Phase**	Implementing
Risk Level	*Some Concerns*		

Monthly Update

Phase 1 of the ACL6 project is currently on hiatus.

11/02/20: Ballpark Budget Memo for the ACL6 2020 Additional Telephone Interviews submitted to Maggie.

10/31/20: Nick Prieur allocated the funds to cover the overrun ($32,332 direct) on the SRO ACL 6 project. Grace projected this credit on the project to erase the overrun status on ACL6 cost report. The remaining funds to be allocated to ACL6 is about $191K now. Nick informed us that we have smoothing on this, so the rest of the funds will be covered in Years 4-5 (Year 4 starts 7/1/21).

7/30/20: Lisa Holland, Shonda and I met with Maggie Hicken and Sarah Burgard to discuss ACL6 Telephone-Only Reboot Proposal (2.0) + Saliva Collection Protocol. We discussed estimate of cases, HPI, protocol, number of attempts, proposed workflow, incentives and staffing. Lisa and DMSS will prepare budget with assumptions we discussed and it could be applied for 10 additional sample (up to 100). Maggie is also working on a separate proposal that would involve saliva collection for the full ACL sample. This would be done after ACL-LIFE data collection wraps up next July 2021.

7/13/20: Maggie seemed hopeful about supplemental funding. Given the current circumstances, however, in person data collection is not feasible. Instead she's now proposing that SSL staff follow up with ACL6 non-responders who

complete the ACL-LIFE interview and ask if interested in completing the ACL6 interview. This is likely a very small number of cases (~10-15).

12/24/19: The Phase 2, decentralized (Reboot) proposal and updated ballpark budget was submitted to the PI (see below). Dr. Hicken submitted the request for an administrative supplement from sponsor (NIMHD) and is awaiting response.

REF: ACL6 2020 Additional Telephone Interviews - Ballpark Budget
SRO #21-0004

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
Nov 06, 2020

Total Cost to Date (Direct + Indirect):	772,520.30
Estimated Cost at Completion (E$AC):	772,520.30
Total Budget:	772,591.00
Variance (Budget minus E$AC):	70.70
Reason For Variance:	Please see Monthly Updates.

Projections
Nov 06, 2020

Dollars Projected For Month:	0.00
Actual Dollars Used:	-69.79
Variance (Projected minus Actual):	-69.79
Reason For Variance:	Respondent incentive check cancellations (credits) and one R check ($30) processed were the only activity this month. Over the next few months we expect to see an additional credits due to incentives checks being voided by the ISR Business Office as they "age out" (have been outstanding for 365 days).

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

Risk Level   *On Track*

Monthly Update   Project updates:

BFY Age 2 continues on pace and meeting overall goals. However, we continue monitoring RR differential between the control groups. Group of respondents receiving a lower income boost is consistently harder to reach (similar to Age 1). Scope for the remainder of Age 2 and the tentative scope for Age 3 have been discussed with the PIs. There will be no in-person data collection in Age 2 nor Age 3, however, we continue planning for limited in-person locating to find some respondents who do not respond to phone calls, emails, text messages. We are monitoring regulations and related communication about feasibility of in-person work across all regulatory institutions overseeing the study (TCCU, NYSPI, and UM) . We are also revisiting alternative ways of reaching participants (via UPS, USPS, and sending little gifts). BFY is also starting the verification process using MSMS. After adjusting the protocol, we see continuing improvements in cooperation rates to the self-administered MCDI survey lifting it from 45% to 67% and now 73% (albeit still below expectations). One attrition in NE (due to permanent job) which can now be absorbed by other interviewers but may require additional hiring in Age 3 and one iwer on PIP. Preliminary scope of Age 3 includes a maternal survey similar to Age 2 administered via phone. It is now unlikely that Age 3 will include self-administered measures (equipment drop-off / pick-up) but the final scope has not yet been discussed.

Data collection / Sample:

Weekly goals and actual by site:

	Goal	Actual	+/-
Overall	306	306	0
Nebraska		82	74	-8
New York		94	95	1
Minnesota		35	46	11
Louisiana		95	91	-4

Staffing:

Age 2 Staffing:
15 iwers in total (-1 from 16 in September)
NE: 1 attrition; remaining 1 + 1 iwer with limited time (both NH from Jan 2020)
MN: 2 (1 Enrollment NH / 1 Jan 2020 hire)
NY: 4 OS (3 with Enrollment experience)
NOLA: 5 (1 onPIP, 2 Enrollment NH and 1 OS / 2 from Jan 2020 hire)
Locators: 2 (OS, one with shared responsibility as a traveler)"

Technical system:
BFY needed to recover Age 1 data for 3 cases. We are currently implementing the verification protocol using MSMS.

Finances:
Total project overrun has decreased after Age 2 and Age 3 scope adjustments due to COVID - 19. New budget model
has been presented to the PIs in early November and tentatively approved.

Special Issues

Cost
Nov 06, 2020

Total Cost to Date (Direct + Indirect):	4,647,356.10
Estimated Cost at Completion (E$AC):	6,756,368.66
Total Budget:	6,127,698.00
Variance (Budget minus E$AC):	-628,043.50
Reason For Variance:	The projected overrun has decreased from $850K after adjusting for expected scope of Age 2 and Age 3 due to COVID-19. Current model has been presented to the PIs in early November and tentatively accepted. Additional reduction is possible after appropriate re-allocation of the indirect cost structure (which needs to be modeled separately due to the funding mix).

Projections
Nov 06, 2020

Dollars Projected For Month:	102,778.53
Actual Dollars Used:	106,875.88
Variance (Projected minus Actual):	-4,097.35
Reason For Variance:	Salary overruns @ management and tech due to new programming @ the recovery of Age 1 data.

Measures

	Units Complete	RR	HPI
Current Goal:	306	—	11
Goal at Completion:	900	—	11
Current actual:	306	—	6.2
Estimate at Complete:	900	—	7
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:**   939,470.00   **InDirect Budget:**   245,092.00   **Total Budget:**   1,184,832.00

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

Report Period	Oct, 2020 (C.A.R.E.)	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update

Project Management:
- Extension of field production to December 2020 has is approved by the PIs.
- The additional funding (~$150,000) will be added to the current PG. Post production work will occur in January 2021.
- Future Plan: Wave 2 might be delayed as a new proposal for funding will need to be submitted to the DoD and NCAA by the CARE consortium
- Documentation: continue on completing the project manual and updating field protocols.

Data Manager:
- Continue to refine reporting and QC systems and tools.

Systems: CSMS
- Met with Vendor (QuesGen) and other study teams weekly to discuss and troubleshoot for system issues. Continue to develop and test system features.
- Trained iwers on the recent added CSMS features

Data Production:
- Emphasis on locating. Working on alternative options to assist locating team.
- Monitored field performances by using different tools in the CSMS with goal of developing optimal strategy for the final three months of production;

Production Stats as of 10/31/2020:
Overall RR: 34.5%
Total Released Cases: 6940
Total Complete IW: 2221
Total Complete WEB IWs = 2048; CATI Comp Iws= 172

Special Issues

Cost
Oct 31, 2020

Total Cost to Date (Direct + Indirect):	966,579.47
Estimated Cost at Completion (E$AC):	1,154,286.29
Total Budget:	1,184,832.00
Variance (Budget minus E$AC):	30,545.71
Reason For Variance:	We are slightly underrunning the project due to reduced number of interviewers and the interviewers' hours. We will make adjustment in future projection.

Projections
Oct 31, 2020

Dollars Projected For Month:	66,026.41
Actual Dollars Used:	53,367.29
Variance (Projected minus Actual):	12,659.12
Reason For Variance:	Field staff production hours were lower than projected due to reduced field staff. Adjustment will be made for November.

Measures

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

Other Measures

Project Name	Detroit Area Wellness Program - COVID Supplement (DAWN CS)
Project Mode	Primary: Telephone Total of Modes: 1

Project Type	Sponsored Projects	**Project Status**	Current

Budget	**Direct Budget:**	301,960.00	**InDirect Budget:** 169,097.00	**Total Budget:**	471,057.00

Principal Investigator/Client	Kristine Ajrouch (Life Course Development Program, ISR) Toni Antonucci (Life Course Development Program, ISR) Laura Zahodne (Life Course Development Program, ISR)
Funding Agency	
IRB	**HUM#:** HUM00154638 **Period Of Approval:**
Project Team	**Project Lead:** Juan Carlos Donoso **Budget Analyst:** Parina Kamdar **Production Manager:** Taghreid Lovell **Senior Project Advisor:** Kirsten Haakan Alcser **Production Manager:** **Production Manager:**
Proposal #:	no data
Description:	Conduct 600 phone interviews: 200 white, 200 black, 200 MENA respondents. 200 white Rs and 50 black Rs will come from wave 3 of the Social Relations Study sample. 200 MENA Rs and 150 black Rs will come from newly screened sample. 30 minute instrument, including a section on social relations, short cognitive assessments, experiences during COVID pandemic and socio-demographic questions.
SRO Project Period	10/2020 - 05/2021
Data Col Period	12/2020 - 04/2021
Security Plan	NA

Milestone Dates

PreProduction Start:	10/01/2020	**Pretest Start:**	
Pretest End:		**Recruitment Start:**	
Staffing Completed:	11/10/2020	**GIT Start:**	11/30/2020
SS Train Start:	12/02/2020	**SS Train End:**	12/04/2020
DC Start:	12/07/2020	**DC End:**	04/15/2021

Other Project Team Members:	Ian Ogden, Kasyera Kowalczyk, Lisa Van Havermaet, Ashwin Dae, Jeffrey Smith, David Dybicki, John Gawlas, Brad Goodwin
Other Project Names:	D-AMP CS
Sample Mgmt Sys	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop; [UM cell] Phone
DE Software	Blaise 4.8 BIA
QC Recording Tool	DRI-CARI; Camtasia
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, prepaid ($25)
Payment Method	Check through STrak RPay System

Report Period	Oct, 2020 (DAWN CS)	**Project Phase**	Initiation
Risk Level	On Track		
Monthly Update	.- Finalizing English and Arabic Specs for main instrument .- Programming and testing for main instrument and screener in English and Arabic .- Finalizing the specs and programming Qualtrics self-scheduler for SRS and newly screened sample .- Finalizing all respondent facing materials (letters, consents, brochures)		
Special Issues	There is uncertainty around whether the newly screened sample will yield the necessary response rate with our current contact protocol, given that we only expect to have valid phone numbers for approximately 60% of all new sample lines.		

Cost
Oct 31, 2020

Total Cost to Date (Direct + Indirect):	21,742.00
Estimated Cost at Completion (E$AC):	454,614.00
Total Budget:	471,057.00
Variance (Budget minus E$AC):	16,442.00
Reason For Variance:	Moving hours from SSS to SSI and SSA team members.

Projections
Oct 31, 2020

Dollars Projected For Month:	22,762.00
Actual Dollars Used:	21,742.00
Variance (Projected minus Actual):	1,020.00
Reason For Variance:	Variance less than 5%

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:			
Current actual:			
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:***	261,360.00	***InDirect Budget:***	146,362.00	***Total Budget:***	407,722.00

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:***	10/2/2020-8/13/2021

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, maternal nutritional or weight status in pregnancy, and pregnancy infection and inflammation on the health of children.

The study includes two sample cohorts: a cohort from previous, ongoing data collection efforts as well as new sample. This 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: 1) a statewide probability sample of 1,000 women from 20 prenatal clinics affiliated with 10 hospitals located in Ann Arbor, Dearborn, Detroit, Grand Rapids, Novi, Saginaw, Port Huron and Traverse City, and 2) 100 women from one clinic in Flint.

SRO's work scope is divided into two phases. During Phase 1, SRO provided assistance with prenatal questionnaire development and designed technical systems for MARCH cohort recruitment conducted by Michigan State University-employed (and other hospital-employed) interviewers and affiliated project staff. During Phase 2, SRO developed systems and is conducting data collection for MARCH sample 3-month. The MARCH age 4-5 follow up interviews and home visits are also in SRO's work scope. All other follow up protocols with the MARCH sample will be administered via REDCap by the MSU team (e.g. at 9-month, age 2 and age 3).

For the MARCH sample, expectant mothers are recruited during their initial prenatal visit to a healthcare provider. During a follow up phone call, respondents are 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 are 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 is conducted by MSU-employed (and other hospital-employed) interviewers using SRO's technical systems and laptops. SRO programmed all questionnaires administered during recruitment, 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 obtains hospital birth records for the mother and child and a placenta sample. The first MARCH babies were born in early 2018.

SRO's data collection activities start after the MARCH babies are born. The first interview with the mother is done when the baby is 3-6 months old. Mothers are interviewed again by MSU when the children are 9-12 months old, and yearly after that until the child is 4 years old. When the children are 3 months old, mothers are asked to provide a child fecal sample and toenail clippings, and at age 4 they will provide shed teeth. Children from the MARCH cohort will be assessed using standardized developmental assessments at 4-5 years old. The assessments will be done during in-home visits.

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
Mark Simonson and Andrew Piskorowski: 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	Oct, 2020 (ECHO)	**Project Phase**	Implementing

Risk Level *Some Concerns*

Monthly Update Re-Engagement Plan

Nineteen women have been recruited since the first site (Beaumont) resumed recruitment on 8/18/20. The team is hopeful that recruitment will continue to pick up this month, as other clinics resume data collection activities.

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

Production Stats

To date, 864 women have been recruited in clinics. Among those cases, 711 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: 688
    3-month sample released: 677
    3-Month Interviews Completed: 482
    Average Attempts / Iw: 7.3
    Iw length: 31.33
    Response Rate: 72%

Special Issues

Cost
Nov 10, 2020

Total Cost to Date (Direct + Indirect):	59,527.64
Estimated Cost at Completion (E$AC):	395,977.06
Total Budget:	407,722.00
Variance (Budget minus E$AC):	11,744.94
Reason For Variance:	

Project Y5 started on September 1. Due to COVID, prenatal recruitment and enrollment is very slow (Phase 1) and much of the 3M follow-up data collection workscope (Phase 2) will likely shift to Project Y6 (September, 2021).

Following suspension of recruitment of new expecting mothers from March-August, 2020, the 3-Month protocol will see a 6-to-8-month period of no new cases being released – approximately from January-July, 2021. Production will be maintained (at very low levels) through at least some of this period. Field effort will not be fully suspended, but is expected to be informally scaled down and scaled up as babies born following the COVID-related pause in recruitment age into the 3-Month protocol.

We reduced interviewer hours based on updated sample projections and will wait to see trend before we reduce further.

Projections
Nov 10, 2020

Dollars Projected For Month:	35,172.87
Actual Dollars Used:	28,458.71
Variance (Projected minus Actual):	6,714.16
Reason For Variance:	

Budget Y5 started on September 1. We have updated projections to reflect current scope of work and recent transition of Phase 1 data management responsibilities to Mark Simonson.

In agreement with TSG Admin (Gregg), Mark will plan on charging 10 hrs to ECHO in October and then up to 20 hrs a month beginning in November. Per Gregg's request, Parina set up an ECHO Y5 Management Support shortcode that is now in the SRO Overhead TSG charge folder in ET. This will be the mechanism for tracking Mark's use of overhead when working on ECHO (that is, beyond the 20 hours he will bill directly to the project).

Shortcode 483603
WBS: SRC.SRO.TS.ECHO5
Start 9/1/2020
End 6/30/2021

We've also updated projections to include 4 hours/month for Andrew Piskorowski who will serve as Phase 1 data manager backup to Mark. He has some experience with Illume already and handles SSRS reporting. We're grateful that Mark is taking on this lead ECHO Phase 1 data management / dev-ops role during this time of transition, and are hopeful we'll have a more permanent Phase 1 data management assignment in the near future.

Brad will continue to serve as Phase 2 data manager at 10 hours/month projected.

We will see an increase in programming hours (Illume, Blaise and SurveyTrak), as we update the prenatal and 3 month instruments in the next few months and accommodate the ECHO-wide protocol data collection elements. We have updated projections to reflect.

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	Oct, 2020 (EDCPE)

Project Phase   Closing

Risk Level   *Some Concerns*

Monthly Update   COVID charges are resolved. Data collection is completed and deliverables are being processed.

Audio consent was a requirement for telephone. Where there were recording issues the alternate solution was to request written consent via email using the secure SignNow software (access provided via U of M IT). The process associated with this took effort that was not projected. Also, clipping audio consent files for delivery was more time consuming than anticipated and means this work will continue into November.

Special Issues

Cost
Oct 31, 2020

Total Cost to Date (Direct + Indirect):	2,715,684.64
Estimated Cost at Completion (E$AC):	2,624,045.73
Total Budget:	2,615,353.00
Variance (Budget minus E$AC):	-8,692.73
Reason For Variance:	COVID charges are resolved. Overrun due to more than expected closeout work associated with phone consents and other data.

Projections
Oct 31, 2020

Dollars Projected For Month:	109,945.94
Actual Dollars Used:	111,808.00
Variance (Projected minus Actual):	-1,862.06
Reason For Variance:	Projections were little off in the projection of the end game management and field work effort.

Measures

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

Other Measures

Project Name	Every Dollar Counts Semi-Structured Interviews (EDC-Semi Structured)		
Project Mode	Primary: Telephone Total of Modes: 1		
Project Type	Sponsored Projects	**Project Status**	Current
Budget	**Direct Budget:** 351,246.00	**InDirect Budget:** 105,374.00	**Total Budget:** 456,620.00

Principal Investigator/Client
Stephanie Chardoul (SRO)
Elizabeth Rhodes (YCR/OpenResearch)
Jessica Wiederspan (YCR/OpenResearch)

Funding Agency

IRB	**HUM#:**	**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:	
	Production Manager:	Rebecca Loomis

Proposal #: no data

Description: There are two phases of the project. In Phase 1, the PI provides a selected list of respondents from the EDC Main study, SRO contacts and conduct 140 semi-structured interviews with them by phone. In Spring 2021, the second phase will be a re-interview of these same 140 respondents, also by phone;

SRO Project Period 05/2020 - 06/2021
Data Col Period 08/2020 - 05/2021
Security Plan NA
Milestone Dates

PreProduction Start: 04/01/2020	**Pretest Start:**
Pretest End:	**Recruitment Start:** 04/01/2020
Staffing Completed: 06/01/2020	**GIT Start:**
SS Train Start: 06/20/2020	**SS Train End:** 07/05/2020
DC Start: 08/01/2020	**DC End:** 05/31/2021

Other Project Team Members: Karin Schneider, Barb Homburg, Becky Loomis, Kasyera Kowalczyk

Other Project Names:

Sample Mgmt Sys	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, Other (By PI)
Administration	SRO Group
Payment Type	NA
Payment Method	NA

Report Period	Oct, 2020 (EDC-Semi Structured)	**Project Phase**	Implementing

Risk Level On Track

Monthly Update October was a pause month for the project with 40 interviews of the 140 needed completed. PIs are re-drawing sample based on the recently-completed EDC Main study. We will begin again in November, expecting new sample the first week of November. Meeting with interviewers intermittently to keep project continuity, they are being offered a bonus equivalent of 10 hours per week to maintain the project during the pause and another $100/interviewer when they return in November to full interviewing and complete a minimum number of interviews.

Special Issues None other than the project pause described above.

Cost
Oct 31, 2020

Total Cost to Date (Direct + Indirect):	131,519.00
Estimated Cost at Completion (E$AC):	447,924.00
Total Budget:	456,620.00
Variance (Budget minus E$AC):	8,696.00
Reason For Variance:	Iwing is more expensive (higher HPI than budget), but we are not traveling and had remote training.

Projections
Oct 31, 2020

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	None

Measures

	Units Complete	RR	HPI
Current Goal:	140		4
Goal at Completion:			
Current actual:	40		6.9
Estimate at Complete:			
Variance:			

Other Measures

Project Name	Harmonized Cognitive Assessment Protocol, 2020 (HCAP 2020)
Project Mode	Primary: Not Available
Project Type	Sponsored Projects

Project Status Current

Budget	*Direct Budget:*	3,300,000.00	*InDirect Budget:*	1,188,000.00	*Total Budget:*	4,488,000.00

Principal Investigator/Client	Kenneth Langa (SRC) David Weir (SRC)

Funding Agency

IRB

	HUM#:		*Period Of Approval:*
Project Team	*Project Lead:*	Maureen Joan O'Brien	
	Budget Analyst:	Richard Warren Krause	
	Production Manager:	Dianne G Casey	
	Senior Project Advisor:	Evanthia Leissou	
	Production Manager:		
	Production Manager:		

Proposal #:	no data
Description:	Building off the 2016 Harmonized Cognitive Assessment Protocol (SRO #15-0011R01) experience, this project will involve the completion of a face-to-face CAPI interview, designed to provide a dementia assessment of HRS respondents. A sample of 4649 respondents (one per household) who are 65 years of age or older will be selected for this effort. The questionnaire will be administered to respondents after their HRS 2020 interview has been completed. The sample will not be clustered geographically. We propose to staff a team of approximately 32 interviewers. It is expected that this team will carry out well-planned regional trips in order to complete the 3200 in-person interviews. The respondent questionnaire length is expected to be 60 minutes. An informant interview will also be completed for each of the respondents interviewed. The informant questionnaire is expected to be 25 minutes and can be administered by telephone.

SRO Project Period	01/2020 - 12/2021
Data Col Period	07/2020 - 08/2021
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:	PDMG: Tony Romanowski, Lisa VanHavermaet, Kasyera Kowalczyk. TSG: Jeff Smith, Brad Goodwin, Peter Sparks, Ashwin Dey, Deb Wilson
Other Project Names:	
Sample Mgmt Sys	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop; [UM cell] Phone
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, R; Yes, INF
Administration	NA
Payment Type	Check, prepaid (50); Check, post (25)
Payment Method	Check through STrak RPay System

Report Period	Oct, 2020 (HCAP 2020)

Project Phase Implementing

Risk Level	*On Track*
Monthly Update	There are no new project updates since last month. Due to the impact of COVID and the suspension of FTF interviewing, HCAP PI's are aiming for a production start "sometime mid-2020", if this will be possible. While this is broad timeframe, the PI's are aware of lead time needed for recruiting, preparations for completing systems development, training, and securing of training venue. At this point the PI's would like to continue with a FTF interview plan, and are not open to phone interviewing of any sort for informants or R's. R interviews consist of a series of cognitive tests, some of which would be very difficult to administer over the phone. At this point, projections

have been pushed forward to December, 2020 – January 2021 for the preproduction with a February/March interviewer training. The project lead will continue to meet with the PI's on a monthly basis to revisit project Key Dates. The project lead continues with minimal hours, and meeting with the Co-PI and PI monthly. Projections will be pushed forward month by month.

Special Issues   Planning pretest-training and pretest, production training during global pandemic.

Cost
Nov 30, 2020

Total Cost to Date (Direct + Indirect):	177,247.75
Estimated Cost at Completion (E$AC):	4,100,317.60
Total Budget:	4,488,000.00
Variance (Budget minus E$AC):	382,682.40
Reason For Variance:	The budget was healthy and was fully funded. We are adding efforts in to benefit the project - see below for detail.

Projections
Nov 30, 2020

Dollars Projected For Month:	909.55
Actual Dollars Used:	860.27
Variance (Projected minus Actual):	49.28
Reason For Variance:	Some staff have not been charging projected hours.

Measures

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

Other Measures

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 Sims
	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:**	04/03/2021

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	Oct, 2020 (HRS 2020) **Project Phase** Implementing
Risk Level	*Some Concerns*
Monthly Update	Date collection began March 2nd. 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. Fifty percent of the preferred mode FTFe were approved for phone interviews with release mid June with the remainder released at the end of September. 3,849 web lines had been released as of August with the non-response follow-up being conducted by field interviewers in SurveyTrak. Limited effort protocol was put on hold in August with 1,000 cases re-activated in SurveyTrak for work by field interviewers.

Datamodel 11 was released to field and web. Broken appointment token was being implemented and discussions regarding another token for preferred mode TEL/FTF respondents were in discussions. Planning for SSA protocols continued.

The team continued to focus on technical development, systems testing, interviewer supplies, coding, and IRB submissions. SAQ mailing protocol was placed on hold until January to give priority to the COVID Antibody mail protocol. The first delivery of data from the COVID open end question transcription was delivered to project staff.

Measures noted in tables below are as of week 35 of data collection (end of September).

Special Issues

COVID19 pandemic impact to conducting in person interviews and budget
Potential impact to locating find rate and response rate due to no FTF efforts
Multiple preload updates and critical issues identified in programming of the datamodel which delayed the release of fresh sample to the field staff in June
PI decision to delay final release of sample to field until late September
Resource strain on the MSMS team and data managers
Availability of essential staff resources for mail assemblies and logging
MSMS technical issues which can inform future development and enhancements needed
Impact to staff and respondents with Antibody Data Collection overlapping with HRS Core Data Collection

Cost
Oct 31, 2020

Total Cost to Date (Direct + Indirect):	11,594,042.66
Estimated Cost at Completion (E$AC):	15,664,017.28
Total Budget:	16,267,431.00
Variance (Budget minus E$AC):	603,413.72
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 of the FTF and enhanced FTFe cases approved for mode change to TEL, stopping interviewer SSA linkage consent, stopping WBD protocol, changing SAQ and SSA to be administered via mail with a phone follow-up, and COVID hours charged to date. Costs for transcription of one COVID question has been added. Revised weekly goals/projections for interviewer hours have been incorporated into CRS.

Projections
Oct 31, 2020

Dollars Projected For Month:	621,546.45
Actual Dollars Used:	669,773.35
Variance (Projected minus Actual):	-48,226.90
Reason For Variance:	Total hours were 26 hours ($11,000 under projections. Postage was about $5000 under, DataForce was $22,000 over due to flatlining the projections in CRS, and respondent tokens were $30,000 over but stop payments for check reissues that had not been processed by the business office. Future projections have been adjusted for these.

Measures

	Units Complete	RR	HPI
Current Goal:	12,697	55%	5.4
Goal at Completion:	17,129*	74%	6.8
Current actual:	12,983	56.4%	5.3
Estimate at Complete:	17,129	74%	6.8
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:*** Ian Ogden
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	Oct, 2020 (H&WB)

Project Phase   Planning

Risk Level	*Some Concerns*
Monthly Update	PIs informed SRO that the COVID supplement proposal has been funded. SRO activities will begin in October/November. We signed off all instruments in Blaise (English and Arabic)

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 July.

Cost **Oct 31, 2020**		
Total Cost to Date (Direct + Indirect):	995,504.00	
Estimated Cost at Completion (E$AC):	2,345,476.00	
Total Budget:	2,317,801.68	
Variance (Budget minus E$AC):	-57,674.00	
Reason For Variance:		
	The projected overrun decreased significantly because of the projected savings stemming from the new sampling strategy, which will allow us to recruit up to 2 eligible respondents per household.	

Projections **Oct 31, 2020**		
Dollars Projected For Month:	448.00
Actual Dollars Used:	1,184.00
Variance (Projected minus Actual):	-736.00
Reason For Variance:	Additional programming time needed to finalize ST

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
Sandra Newman (Johns Hopkins University)
Tama Leventhal (Tufts University)

Funding Agency
NICHD, HUD, RWJ Foundation, MacArthur Foundation

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:	Carlos Andres Macuada Lopez

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:***	
SS Train Start:	08/18/2020	***SS Train End:***	08/21/2020
DC Start:	08/24/2020	***DC End:***	12/31/2020

Other Project Team Members:
Jeff Smith - Tech Lead, Paul Burton - DMSS, Gary Hein, PDMG, Ian Ogden, PDMG, Deb Wilson, Help Desk, Ashwin Dey, Webtrak/Weblog, Marsha Skoman, ST, Jim Hagerman Blaise

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 prenotification Wave 2); Cash, post ($75 adult, $50 child (Wave 1)); Other (child gift <$5, Fir
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office;

Report Period	Oct, 2020 (HCDC, H&C)	**Project Phase**	Implementing
Risk Level	On Track		

Monthly Update

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. Provided additional information regarding invoices and posted backup on the SFTP.
• Revised and updated project schedule.
• Supervised work on sample management systems to include integration of external respondent payment records.
• IRB
o Prepared and submitted Continuing Review documentation.
o Updated locating letters, texts and e-mails in preparation for new IRB amendment

• Developed and delivered key statistics report from PCG interview to monitor potential response bias
• Prepared weekly production reports. Modified reports to meet the needs of the research team.
• Missing data callbacks due to program error
o Prepared Excel file to manage sample for missing data callbacks

Task 2: Sampling
% Task Spent to Date
• Attended project meetings.
• Updated production dashboards as needed to include necessary data and make reports more user-friendly
• Assisted with data analysis for program error
• Began work on propensity models
• Released withheld Spanish sample

Task 3: Questionnaire Development
% Task Spent to Date
• No effort this month

Task 4: CAI Programming
% Task Spent to Date
• Attended technical team meetings; provided input on study progress

Task 5: Systems Programming
% Task Spent to date
• Modified field sample management system application (Surveytrak) to fix bugs and incorporate changes requested by management team.
• Developed reports necessary to execute respondent payments; worked to integrate respondent payments records into the sample management system
• Continued programming sample management system and reports for administrative records collection Weblog (logging application)

Tasks 6, 7: Interviewer Recruitment & Hiring, Training
% Task Spent to Date
• Trained team leaders to conduct missing data callbacks.
• Trained interviewers to assist locating team.

Task 8: Main Data Collection
% Task Spent to Date
• Interviewers and dedicated locators conducted respondent locating on hard-to-reach lines.

- Logged and responded to incoming email and phone requests for interviews.
- Logged returned mail; re-mailed prenotification letters where necessary
- Mailed tokens of appreciation for PCG interviews
- Production interviewing is ongoing. As of November 1 (reflecting production through October 31st):
o   1083 Coverscreens completed
o   917 PCG interviews completed
☐   14 non-intact households
- Conducted interviewer performance evaluations
- Kitted materials for records-matching mailing. Shipped materials for first cohort of record-matching data collection
(n = 350).
- Conducted missing data callback interviews

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 project is projecting a substantial underrun, currently estimated between $130,000 and $180,000 in direct costs. The underrun results from staffing changes at SRO brought about by the pandemic, the revised verification effort, as well as interviewer efficiency during completion of the first 750 completed cases. There are some unknowns, such as the response rate for the administrative records forms and the level of support required for respondents for completion of the records forms. SRO will continue to update the research team as projections become more stable.

•   The implementation of the Emergency Family and Medical Leave Expansion Act (EFMLA) and the Families First Coronavirus Response Act (FFCRA) impacted 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. We do not expect these charges to significantly impact SRC's ability to complete the H&C project within the current budget allocation.

o   For this billing period, $0 Direct Cost were associated with use of EFMLA or FFCRA usage.

•   The project was delayed from a budgeted start date of April 2020 until mid-August 2020 due to the coronavirus epidemic. The project was changed to an all-telephone administration. The delay and scope change impacted project costs related to additional questionnaire and sample management system programming changes, as well as ongoing management costs due to the project extension.

o   The reduction in work scope (no child questionnaire, no neighborhood observations, no in-person interviewing, and no biomarkers or physical measures) is expected to reduce data collection costs.

o   Change in verification protocols is expected to marginally reduce data collection costs while increasing the verification rate significantly.

•   Continued changes to the questionnaires and scope which impact the sample management systems has led to cost overruns for questionnaire design and programming tasks.

o   The PCG questionnaires (in-area and out-of-area) for Wave 2 were not finalized until after the initial deadline. 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.

o   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.

o   Further changes related to the change in scope from face-to-face interviewing to all-telephone interviewing will further impact project costs and increase overruns in tasks related to systems development and reporting.

•   The delay in the data collection field period from 2019 to 2020 increased 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 was originally 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.

•   Social Security forms will be collected via a mail survey (approved by the research team). The data collection will be conducted following a protocol for a traditional mail survey, with a cohort beginning each month.

•   A holiday card mailing with a study magnet will be shipped to respondents in December 2020.

Cost

Nov 09, 2020

Total Cost to Date (Direct + Indirect):	10,564,686.97
Estimated Cost at Completion (E$AC):	11,629,860.65
Total Budget:	11,843,058.00
Variance (Budget minus E$AC):	213,197.35
Reason For Variance:	The variance is due to COVID-19 related scope changes. The project moved from FTF interviewing with a complex field protocol to a telephone/mail data collection.

Projections
Nov 09, 2020

Dollars Projected For Month:	304,876.30
Actual Dollars Used:	328,352.58
Variance (Projected minus Actual):	-23,476.28
Reason For Variance:	A large cache of respondent gift cards was processed in October instead of November as anticipated, accounting for over $22,000 of the variance. Higher QC production lead to more SSL hours charged. Postage for social security administration mailings underprojected.

Measures

	Units Complete	RR	HPI
Current Goal:	1041 PCG iws	75% of located cases	8.5
Goal at Completion:	1041 interviews	75% of located cases	8.5
Current actual:	917	51%	7.2
Estimate at Complete:			
Variance:			

Other Measures   Locate and screen 75% of Population cases, 80% of voucher sample cases

Project Name	HRS 2020 COVID Antibody Test (HRS 2020 ABT)		
Project Mode	Primary: Mail Total of Modes: 1		
Project Type	Sponsored Projects	**Project Status**	Current
Budget	**Direct Budget:** 601,330.00	**InDirect Budget:** 216,479.00	**Total Budget:** 817,809.00

Principal Investigator/Client
David Weir (SRC)
Jessica Faul (SRC)

Funding Agency   NIH

IRB   **HUM#:**   HUM00061128   **Period Of Approval:**   8/20/20-8/19/21

Project Team
Project Lead:	Evanthia Leissou
Budget Analyst:	Richard Warren Krause
Production Manager:	Lloyd Fate Hemingway
Senior Project Advisor:	Nicole G Kirgis
Production Manager:	Jennifer C Arrieta
Production Manager:	

Proposal #:   no data

Description: The HRS 2020 COVID Antibody Study is a supplement to the HRS to accurately assess who has been exposed and infected with SARS-CoV-2. Antibody testing for the novel coronavirus that causes COVID-19 will provide an indication of the characteristics of people who were infected in this national sample. It is important to understand how the relative size of these groups differs by race/ethnicity, socioeconomic status, work status, education and geography in order to add to our understanding of who was infected with the coronavirus, as well as those who went on to have symptoms and develop COVID-19 during the pandemic progression. Saliva collection kits will be mailed to approximately 17.600 respondents homes. The consent document will detail the purpose of the study and what is being requested of them. The consent includes two questions - if the respondent ever received a positive COVID test result and the date of that test. The collection will be administered in both English and Spanish. The sample will consist of all HRS 2020 sample members who do not reside in a nursing home. The field period is expected to occur between October 15, 2020 and December 31, 2020 before a vaccine is widely available. We expect 65% of the sample to consent to this collection. This project is being conducted in collaboration with the ISR Biospecimen lab.

SRO Project Period   09/2020 - 04/2021
Data Col Period   10/2020 - 02/2021
Security Plan   NA
Milestone Dates

PreProduction Start:	09/01/2020	**Pretest Start:**	10/09/2020
Pretest End:	10/15/2020	**Recruitment Start:**	09/22/2020
Staffing Completed:	09/30/2020	**GIT Start:**	
SS Train Start:		**SS Train End:**	
DC Start:	10/19/2020	**DC End:**	01/31/2021

Other Project Team Members: Andrew Hupp, Debbie Zivan, Dan Tomlin, Tony Romanowski, Daniah Buageila, Anna Fuqua-Smith, Janet McBride, Jim Rodgers, Laura Yoder, Holly Ackerman, Deb Wilson, David Bolt, Matt Hanger, Tricia Blanchard, Lloyd Hemingway

Other Project Names: HRS Antibody, Antibody Project

Sample Mgmt Sys   MSMS
Data Col Tool   Other (COVID Antibody Saliva Kit, Paper/Pencil)
Hardware   Laptop; Desktop; Paper and Pencil
DE Software   Other (MSMS)
QC Recording Tool   N/A
Incentive   Yes, R
   Administration   SRO Group
   Payment Type   Check, prepaid ($20)
   Payment Method   Check through STrak RPay System

Report Period   Oct, 2020 (HRS 2020 ABT)   **Project Phase**   Planning

Risk Level   *Some Concerns*

Monthly Update   During October, the team was busy finalizing work scope, budgeting, defining sample, staffing, technical systems, kit QC space at Thompson, access rights to Thompson for SRO staff, material development, IRB submission, and

collaboration with the ISR Biopspecimen lab in effort that led to launch of production start on October 22nd.

Sample size = 17,639. Based on updated data from 2020 data collection, we project about 16,500 respondents to be sent a kit. As of 11/11/20, 5,331 kits had been shipped to respondents of which:
- 764 (14%) sent in a saliva sample
- 187 (4%) refused
- 6 (0.1%) are deceased.
Measures noted in table below are as of 11/11/20:

Special Issues

A revised budget will be submitted based on work scope changes made in early October.
Added complexity collaborating on production tasks with the ISR Biospecimen lab.
Data manager and MSMS team resources
HRS Core data collection ongoing in field while Antibody test kits are being shipped to respondents.

Cost
Oct 31, 2020

Total Cost to Date (Direct + Indirect):	516,196.66
Estimated Cost at Completion (E$AC):	673,859.77
Total Budget:	817,809.00
Variance (Budget minus E$AC):	143,949.23
Reason For Variance:	Variance projected is due to respondent token voids projected. Voids were not included in the budget.

Projections
Oct 31, 2020

Dollars Projected For Month:	521,869.74
Actual Dollars Used:	513,869.74
Variance (Projected minus Actual):	7,538.25
Reason For Variance:	Hours between projected and actuals was 13 hours ($1,400). The primary variance is due to non-salary respondent tokens. The selected sample was 17,639 but the actual number of respondents who will be sent a kit is closer to 16,500 based on updated data from HRS core data collection.

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:	11,465	65%	
Current actual:	764	5%	
Estimate at Complete:	10,725	65%	
Variance:	740	0%	

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.

As of March 14, 2020 all field data collection was halted due to COVID-19; as of July, 2020 all ongoing project maintenance was halted and the project deactivated, anticipating a potential re-launch in early-2021.

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

Risk Level   *Some Concerns*

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

[Pre-Deactivation Tasks - Status]

(a) [Pending] Though, so as not to speculate on what form a re-launched pilot may take in terms of sample / goals / incentive, we will continue to maintain an expected Respondent/Subjects cost of $21,000 (105 participants receiving $200 each), we will void any checks printed upon recruitment and in SRO's possession (approximately 30-50 checks), and issue stop-payments on the small number of checks held by imaging site teams. This should result in significant negative actual costs in the month they are processed, but the pilot's EAC should remain as it is (~$226,XXX).

(b) [Pending] Moving status of project into "Deactivated" status until any re-activation conversations resume.

(c) [On Hold] Resolution of outstanding QC issues in imaging site data-entry: On hold; though several issues remain, we are considering this to be tabled until any re-launch conversations begin.

(d) [On Hold] Update to Neuroimaging Production Report: On hold; pending additional person-level data from SRC Team. Considered low-priority.

Special Issues

(1) [Ongoing through Deactivation] Successfully re-launching this pilot after significant time and both HRS and HCAP 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
Oct 31, 2020

Total Cost to Date (Direct + Indirect):	196,998.40
Estimated Cost at Completion (E$AC):	226,144.70
Total Budget:	186,301.00
Variance (Budget minus E$AC):	-39,843.70
Reason For Variance:	EAC has remained generally stable for the last several months. This project will be moved into "Deactivated" status once some administrative tasks are completed (including voiding printed checks and issuing stop-payments on a number of checks being held by imaging site teams) - targeting deactivation in December, 2020.

[Previously Reported]
August, 2020: COVID-related costs to the project as of July were approximately $3,000; we believe some of these costs were subsequently revised due to the change in eligiblity for usage of COVID / PAN hours from 6/17/2020. Our Total Cost to Date is down slightly as a result.

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
Oct 31, 2020

Dollars Projected For Month:	19.96
Actual Dollars Used:	-1,037.77
Variance (Projected minus Actual):	1,057.73
Reason For Variance:	Projections for October were effectively zero. Actual costs for the month were negative due to the processing of some check voids.

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   No changes from 08/2020 report.

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	Oct, 2020 (IHDS3)

Project Phase	Implementing

Risk Level   *On Track*

Monthly Update   The project continues to be in the pre-production phase. The team focused this month on wrapping up changes to the HH project, prepare for translation of instruments and finalize the remaining data models.

The HH Project data out processes, Webtrak and ST Project were finalized and the CRQ's were thoroughly reviewed by the clients in order to freeze the instruments.

SRO conducted a training for NCAER to help them work on the instrument translations using BTT.

The client continued working on finalizing the outstanding Community Medical CRQ as well as revising changes to the Community Teacher and Community School. The team implemented the last client changes to the Community Project and released the Community Medical Blaise Instrument to the client for testing.

The Migrant instrument was also finished and released to the clients. Continued to work with the client to finalize the design the MIG ST project to help guide the Iwers in following a call protocol.   A big effort this month was working and testing the automatic generation of preload data for samplelines spawned from the HH Project to the Migrant Project.

The internal project's management team is meeting weekly to continue to coordinate this effort.

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 translations from the client
○ Mitigation: conducted a BTT training this month and continue to communicate back and forth to make sure they understand how to use the system.

● 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 and we lost a data manager a few months ago and now have recently lost our data manager again.
○ Mitigation:
■ We now have a data manager team (Laura Yoder, Cheng Zhou and Sarah Broumand) and trying hard to catch up and complete all the required tasks
■ 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

Cost
Oct 31, 2020

Total Cost to Date (Direct + Indirect):	460,100.88
Estimated Cost at Completion (E$AC):	617,390.81
Total Budget:	531,902.53
Variance (Budget minus E$AC):	140,493.72
Reason For Variance:	Budget has increased to $757,884.53 due to the addition of the Gates3 Fund. This project is saving hours because this project will be put on hold and we dk what additional issues will arise when restart happens. We also need to preserve hours to support production. With the scale of this project it will be necessary to save to contingencies.

Projections
Oct 31, 2020

Dollars Projected For Month:	47,931.64
Actual Dollars Used:	47,968.41
Variance (Projected minus Actual):	-36.77

Reason For Variance: Implementation phase got extended. Froze the House Hold project at the end of October.

Measures

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

Other Measures

	Units Complete	RR	HPI
Current Goal:			

Project Name	Malaysia Ageing and Retirement Study Wave 2 (MARS 2)
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 2

Project Type Sponsored Projects **Project Status** Current

Budget *Direct Budget:* 187,281.00 *InDirect Budget:* 67,421.00 *Total Budget:* 254,702.00

Principal Investigator/Client David Weir (UM SRC - HRS)

Funding Agency Health and Retirement Study

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

Project Team
Project Lead: Margaret Lee Hudson
Budget Analyst: Richard Warren Krause
Production Manager:
Senior Project Advisor: Evanthia Leissou
Production Manager: Kasyera Kowalczyk
Production Manager:

Proposal #: no data

Description: The Social Wellbeing Research Centre (SWRC) at the University of Malaya is conducting the second wave of data collection for the MARS study, including questionnaire revision, questionnaire translation into Mandarin and Malay, and instrument technical redesign in order to incorporate Wave 1 preload information. In this effort, SWRC will revisit n=5,613 respondents from the first wave, as well as 1,000 additional households from which they will select up to three eligible respondents. The first wave of MARS included up to three randomly-selected members from each household aged 40 and older. The average interview length is expected to be 70 minutes. Data collection will be conducted in English, Malay, and Mandarin.

SRO Project Period 01/2020 - 05/2021
Data Col Period 09/2020 - 04/2021
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:
Jay Lin   Technical Lead
Gina Cheung   Technical Advisor
Peter Sparks   Blaise Programmer
Holly Ackerman   WebTrak Programmer
John Gawlas   HelpDesk Specialist
Genise Pattulo   HelpDesk Supervisor
Cheng Zhou   Database Administrator
LihShwu Ke   Database Administrator
Marsha Skoman   SurveyTrak Intl Programmer
Ashwin Dey   SurveyTrak Offline
Brad Goodwin   Data Manager
Emmanuel Ellis   HelpDesk Specialist (back up)

Other Project Names:

Sample Mgmt Sys Other (ST International)
Data Col Tool Blaise 4.8
Hardware Laptop
DE Software NA
QC Recording Tool N/A
Incentive Not used
Administration N/A
Payment Type N/A
Payment Method N/A

Report Period Oct, 2020 (MARS 2) **Project Phase** Implementing

Risk Level	*On Track*

Monthly Update   Production started this month after making final post-training adjustments. Also this month, production moved from FTF to telephone only in most populous areas of the country due to governmental restrictions due to pandemic. Production continues slowly. Some changes have been needed to the questionnaire and WebTrak/reporting to adjust for the TEL mode and inability to complete physical measure data collection.

Special Issues

Cost
Nov 09, 2020

Total Cost to Date (Direct + Indirect):	146,816.86
Estimated Cost at Completion (E$AC):	226,680.88
Total Budget:	254,702.00
Variance (Budget minus E$AC):	28,021.12
Reason For Variance:	No international travel; elongated production period given slower production due to pandemic

Projections
Nov 09, 2020

Dollars Projected For Month:	24,147.17
Actual Dollars Used:	16,468.67
Variance (Projected minus Actual):	7,678.50
Reason For Variance:	Technical resources not available, work will be done in the next month

Measures

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

Other Measures

Project Name	Mellon College and Beyond II (CBII)
Project Mode	Primary: Web Total of Modes: 1
Project Type	Sponsored Projects

Project Status   Current

Budget	*Direct Budget:*	643,762.00	*InDirect Budget:*	0.00	*Total Budget:* 643,762.00

Principal Investigator/Client	Paul Courant (Gerald R Ford School of Public Policy) Kevin Stange (Gerald R Ford School of Public Policy) Susan Jekielek (ICPSR)
Funding Agency	

IRB	*HUM#:*	*Period Of Approval:*
Project Team	*Project Lead:*	Maureen Joan O'Brien
	Budget Analyst:	Carl S Remmert
	Production Manager:	Lisa J Carn
	Senior Project Advisor:	Nicole G Kirgis
	Production Manager:	James Koopman
	Production Manager:	

Proposal #:	no data
Description:	TBD

SRO Project Period	10/2020 - 10/2021
Data Col Period	01/2021 - 06/2021
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:	Peter Batra - Programmer and technical lead, former MCBII Pilot Lead, Laura Yoder - Data Ops, Dave Dybicki - Systems Programmer,
Other Project Names:	
Sample Mgmt Sys	SMS
Data Col Tool	Illume
Hardware	Laptop; [UM cell] Phone
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post (30)
Payment Method	NA

Report Period	Oct, 2020 (CBII)

Project Phase   Initiation

Risk Level	*On Track*
Monthly Update	The project grant has just been created yesterday, 11/15/20. Shortcodes have not yet been created as a result, and projections have not yet been put into CRS. The budget analyst is currently working on creating shortcodes, then he and the project lead will add projections into CRS. For now, project staff is using a temporary shortcode. Project planning and development of systems is well underway. SRO has received sample from ICPSR. Sample will be sent to Accurint tomorrow for a batch update. When the sample is returned, SRO will stratify sample by quality of contact information and select 15,000 from the ~27,000 sample provided. The instrument is currently being tested by SRO and ICPSR project staff and programming is almost done. Details about timing of reminder emails and phone calling are currently being decided. Materials have gone to the IRB for an amendment. Once approved, SRO will request sample mailings from Print/Copy/Mail to send to PI's to review. Mailings will be assembled as early as possible after the sample is selected. Mailing is scheduled to go out the week of January 11.

Special Issues

Cost
Nov 30, 2020

Total Cost to Date (Direct + Indirect):	100.00
Estimated Cost at Completion (E$AC):	643,278.05
Total Budget:	643,762.00
Variance (Budget minus E$AC):	100.00
Reason For Variance:	Cost information will be updated once project is in CRS.

Projections
Nov 30, 2020

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	Cost information will be updated once project is in CRS.

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:	Margaret Lavanger
Senior Project Advisor:	Gregg Peterson
Production Manager:	
Production Manager:	

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, Minako, David B, Debra 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	Oct, 2020 (MTF base year 2017-2022) **Project Phase** Planning
Risk Level	*On Track*
Monthly Update	October updates - Final integration testing of portal, launching survey link, survey, Web SMS and data transfer to web SMS. - The MTF team continue to recruit schools for the pilot.

- A pack of materials was mailed to the first pilot school - this included Parental permission letters which will be mailed out by the school.
- Approximately 200 schools have been recruited for the Base Year (out of around 400) - data collection will begin in February 2021.

Special Issues

Cost
Nov 10, 2020

Total Cost to Date (Direct + Indirect):	5,005,403.54
Estimated Cost at Completion (E$AC):	7,221,828.30
Total Budget:	7,316,931.00
Variance (Budget minus E$AC):	95,102.70
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.
- Wave 4 - below budget because data collection was halted on 13 March (due to COVID pandemic all FTF research was halted). All data collection costs were below those projected.
- Wave 5 - Due to change in data collection design (new web mode) IWER hours and other costs associated with in person school admins are are lower than originally projected (based on initial assumptions about the IWERs role in the remote admins and the number of in person admins and travel costs). Hours required by SRO staff have also been reduced - hours are also not required until around four months later than the usual schedule. During the pilot we will be tracking IWER hours required for specific parts of the school admin process. These hours will be used to adjust the current projections for BY21.
The notes sent with the October Client cost report will be uploaded (in MPR).

Projections
Nov 10, 2020

Dollars Projected For Month:	45,297.98
Actual Dollars Used:	30,027.04
Variance (Projected minus Actual):	15,270.94
Reason For Variance:	The timetable for the pilot was pushed back by a few weeks - as a result some management and technical development hours were not needed at the beginning of November. The pilot will now probably run up to mid' Dec.

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) 2020 (MTF Panel (main data collection) 2020)
Project Mode	Primary: Web Total of Modes: 1

Project Type	Sponsored Projects		**Project Status**	Current

Budget	***Direct Budget:***	662,512.00	***InDirect Budget:***	368,621.00	***Total Budget:***	1,031,133.00

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	Oct, 2020 (MTF Panel (main data collec	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update

Production continues to go well. Current overall RR including the new release for the Base Year 2020 sample is 43.44%. The supplemental budget to accommodate this additional work is complete and the total for all work is reflected in the MPR figures. The survey closure date has been extended to 11/19.

Special Issues

Cost
Oct 31, 2020

Total Cost to Date (Direct + Indirect):	804,118.22
Estimated Cost at Completion (E$AC):	869,057.31
Total Budget:	1,031,133.00
Variance (Budget minus E$AC):	162,075.69
Reason For Variance:	Includes an under-run carried over from 2016- 2019.

Projections
Oct 31, 2020

Dollars Projected For Month:	35,720.63
Actual Dollars Used:	23,418.52
Variance (Projected minus Actual):	12,302.11
Reason For Variance:	Under-run is spread between less hours charged as well as lower Illume changes than projected.

Measures

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

Other Measures

Project Name	MTF Vaping Project (MTF 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

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Report Period	Oct, 2020 (MTF Vaping Project)	**Project Phase**	Implementing
Risk Level	*On Track*		
Monthly Update	Data collection for the baseline Vaping survey increased the response rate to 24% (from 18% last month). The study team decided to re-open the baseline survey and keep it open until just before Thanksgiving to allow any additional R's to complete this (The Baseline will now close on Nov 24). They had a few R's get in touch with them after we closed on our original date. This pushes our data collection and data delivery date to Dec 14, which will then allow anyone completing the baseline survey on Nov 24 the additional 14 days (and 3 days grace period) to complete the associated daily diaries.		

Looking back, the two PDMG staff (Steven and Melissa) who finished their work in October, worked out very well to provide non-response calling efforts. A win-win for PDMG and the MTF project team.

Special Issues

Cost
Nov 30, 2020

Total Cost to Date (Direct + Indirect):	88,975.83
Estimated Cost at Completion (E$AC):	104,092.13
Total Budget:	174,504.00
Variance (Budget minus E$AC):	70,411.87
Reason For Variance:	We have been able to re-use much of the programming and systems in place for the MTF HID project.

Projections
Nov 30, 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	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

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Report Period   Oct, 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. Closeout efforts are being finalized. PUF4 has been delivered. The one remaining deliverable to NCHS from ICPSR was the contextual file, which has been delivered. From the SRO side, the PII file was delivered on 11/12. Remaining deliverables include copies of materials which NCHS had first stated they did not want, but have now decided that they want. SRO is being careful to only send materials that are named in the contract's schedule of deliverables. In addition to materials, NCHS is requesting additional Blaise code and copies of all DAA renewal paperwork. The PI is negotiating regarding the delivery of this additional Blaise code, as it is in Blaise 4.8, and there seems to be some urgency with this new request. FSEC closeout will begin in the first week of

December. All files that have been requested to move through FSEC have been reviewed to determine they contain no PII, and are currently being held in a 'life boat' which will be moved out of FSEC prior to it's dismantling. Regarding the NSFG closeout budget, we are currently projecting a total of approximately $18,991 total underrun.   It is unlikely we will be able to reduce this underrun by a significant amount. Updates on total budget:
Total C8-10 Budget: $45,682,579
Actuals+Projections: $45,659,504
Variance: $23,075

October 2020 Post Production:
Actuals: $68,783.04
Projections: $78,407.16
Variance: $9,624.12

Total Post-production:
Budget: $902,000
Projected CAC: $883,009.02
Variance: $18,990.98

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
Nov 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
Nov 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#:**   HUM00166316   **Period Of Approval:**   6/11/18 - 8/4/2021

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 - 02/2021
Data Col Period   09/2019 - 12/2020
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:**	12/05/2020

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

Report Period   Oct, 2020 (CDS-19)   **Project Phase**   Implementing

Risk Level   *Some Concerns*

Monthly Update   Spanish data collection (COVID IW) began on 10/2.

688 COVID IWs completed by 10/31. 41% RR.

Fall reminder card was sent out to non-final COVID iw PCGs (n=1195) on 10/20.

PIs requested timeline extension. Originally planned to end COVID iwing on 12/5; COVID iwing extended to 12/31.

Time Diary Reminder Calls extended to 1/16. Follow up Calls extended to 1/31. Logging and Time Diary Coding projections expected to continue into the Spring. Working with PIs to determine the cost implications of extending data collection - approval pending at end of October.

Weekly Survival Analysis meetings with PIs and DMSS began on 10/7. Tech team meetings are now bi-weekly as field tech systems are stable. SSL tech system development is still needed.

Resumed weekly shipments of saliva samples to the ISR Biospecimen Lab on 10/28.

Time Diary Data Entry training took place on 10/6.

IRB amendments submitted on 10/8 (approval date 10/13) and 10/30.

Planning Middle bird incentive period 11/16-11/30, and End Game (12/21-12/31). COVID iwing TOA will increase from $30 to $50 for both periods.

Planning one-time IWER bonus (field and lab)

Special Issues

Weblog follow up application outstanding - have not been able to start the reminder calling effort.
Projecting overrun - PIs kept informed.

Cost
Oct 31, 2020

Total Cost to Date (Direct + Indirect):	8,218,684.01
Estimated Cost at Completion (E$AC):	9,098,184.93
Total Budget:	8,965,959.00
Variance (Budget minus E$AC):	-132,225.93
Reason For Variance:	Increased data collection projections to extend field data collection to 12/31. Note: Original budget created for a different scope than what is being implemented. Revised Time Diary coding and data entry projections based on actuals, which were higher than budgeted.

Projections
Oct 31, 2020

Dollars Projected For Month:	281,395.01
Actual Dollars Used:	283,860.11
Variance (Projected minus Actual):	-2,465.10
Reason For Variance:	Higher postage costs than expected.

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: Telephone 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	Oct, 2020 (WMH-Qatar)
Project Phase	Implementing
Risk Level	*On Track*
Monthly Update	SESRI conducted the Pilot CATI interviewer training for pooled phone calling. The pilot data collection started the week of October 18th. The SESRI team communicated that they will be using the updated list of the agreed upon CATI QC indicators. Once the pilot is completed, the SRC project management team will meet with SESRI to debrief and revise the QC indicators if needed. The SRC team is helping SESRI verify an acceptable computation for response rate, now that since this is a phone pooled sample rather than a FTF Iw.

Special Issues   None

Cost
Oct 31, 2020

Total Cost to Date (Direct + Indirect):	56,102.57
Estimated Cost at Completion (E$AC):	67,214.71
Total Budget:	74,928.00
Variance (Budget minus E$AC):	7,713.29
Reason For Variance:	Project team will be re-allocating some of the hours to be consumed during the remaining term of the contract. Saving dollars for production.

Projections
Oct 31, 2020

Dollars Projected For Month:	2,025.86
Actual Dollars Used:	502.07
Variance (Projected minus Actual):	1,523.79
Reason For Variance:	Some of time was not consumed because client was busy launching a new pilot that became necessary due to the COVID19 pandemic. As a result, they had to create a pilot for phone interviewing rather than FTF.

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 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	Oct, 2020 (STARRS-LS Supplement)	**Project Phase**	Closing
Risk Level	*On Track*		
Monthly Update	See monthly update for STARRS-LS Waves 3 & 4		
Special Issues	See monthly update for STARRS-LS Waves 3 & 4		

Cost
Sep 30, 2020

Total Cost to Date (Direct + Indirect):		640,425.02
Estimated Cost at Completion (E$AC):		640,425.02
Total Budget:		640,000.00
Variance (Budget minus E$AC):		-425.02
Reason For Variance:		The Supplement funds expired in June and cost reports showed an overall project deficit. However, we were able to move some costs to the new STARRS Wave 3-4 award when it finally became available in August. That closeout process was in progress throughout August and finalized in September. We are closing out the Supplement accounts with a small overrun of $425.02.

Projections
Sep 30, 2020

Dollars Projected For Month:		0.00
Actual Dollars Used:		-6,288.97
Variance (Projected minus Actual):		6,288.97
Reason For Variance:		The positive variance is due moving remaining costs to the new STARRS Wave 3-4 award.

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 Waves 3 & 4)
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	***Direct Budget:*** 8,210,436.00 ***InDirect Budget:*** 4,597,851.00 ***Total Budget:*** 12,808,287.00
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#:*** HUM00180765 ***Period Of Approval:*** 6/3/2020 - 6/2/2021

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). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.

For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data.

To date, we have completed 2 waves of STARRS-LS interviewing. During Wave 1, we attempted to contact 50,000 individuals and completed approximately 14,500 full interviews. All Wave 1 participants that completed a full Wave 1 interview were asked to participate in Wave 2. Waves 3 and 4, which are covered in this application, will include the full STARRS-LS Wave 2 sample, regardless of whether they completed the interview.

In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys).

SRO Project Period   05/2020 - 04/2025
Data Col Period   11/2020 - 10/2024
Security Plan   Yes

Milestone Dates

PreProduction Start:	04/01/2020	***Pretest Start:***	
Pretest End:		***Recruitment Start:***	07/23/2020
Staffing Completed:	10/01/2020	***GIT Start:***	
SS Train Start:	11/18/2020	***SS Train End:***	11/24/2020
DC Start:	11/09/2020	***DC End:***	11/03/2022

Other Project Team Members: Heather Schroeder, Paul Burton, Ryan Yoder, Leah Roberts, Keith Liebetreu, Kelsey Mulka, Becky Loomis, Cheng Zhou, Andrew Piskorowski, Lamont Manley, Lisa Van Havermaet, Stephanie Windisch, Youhong Liu, Peter Sparks. Pam Swanson, Genise Pattulo, Andrew Hupp, Jim Rodgers, Kyle Goodwin, Marcus Blough, Nick Hinkle-DeGroot, Aimee Miller, Maureen O'Brien

Other Project Names:	STARRS-LS Continuation
Sample Mgmt Sys	MSMS
Data Col Tool	Blaise 5
Hardware	Laptop; Desktop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	Other (Blaise CARI)
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post ($50-$100)
Payment Method	Check through other system (MSMS)

Report Period	Oct, 2020 (STARRS-LS Waves 3 & 4)	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update

☐ We continued to refine our budget projections for the STARRS-LS Continuation 5-year study period.

☐ We sent U-M's final report for the Supplement period (04/19-6/20) along with a financial table to USUHS on October 14.

☐ We reported final numbers for the Supplement award (in this report).

☐ We provided USUHS with an email explaining the need to delay the launch of Wave 3 production by three weeks. The research team forwarded the notification to the ODUSA on October 5.

☐ The U-M team collaborated on follow-up items from the Sept. 17 GSC meeting, including: pilot study options, revised SOW/cost reporting format, and determining a way forward on the Wave 4 data collection, analyses and timeline.

☐ We continued making progress on Wave 3 pre-production activities:

o The Harvard and U-M teams signed off on the web version of the instrument.

o We integrated the survey instrument with our sample management system and began integrated testing of the systems.

o The first day of (remote) team leader training was held October 29.

o The ODUSA and U-M Safety Plan teams held a Safety Plan planning videoconference on October 23.

☐ IRB: We received concurrence for the STARRS-LS (2015-2020) continuing review, STARRS-LS (2020-2025) Continuation protocol, and Continuation Amendment #1.

☐ Our Enclave security lead worked on Annual Security Controls Review items.

☐ We continued work on biomarker group requests for assistance. During the month, work was carried out on two active requests.

☐ We decrypted, processed and posted the remaining four (66 of 66) construct files to the Enclave.

☐ We received files containing geospatial predictors from Harvard. The U-M team set up an SFTP account, downloaded, unpacked and reviewed the files, then moved the files onto the specified location on the Enclave.

☐ 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).

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

- Pilot Study
o While the U-M IRB has determined that the study does not have consent to permit name and SSN be provided to NIOSH to obtain updated addresses, we understand that the GSC Executive Committee's interest in other sources of addresses for the STARRS-LS non-responders remains high. U-M will create a proposal and budget for a pilot study in which any new contact information for study participants will be obtained only via U-M locating procedures, including Accurint. Should the ODUSA and GSC pursue other avenues for updated contact information, we remain concerned that the research team (U-M in particular) may appear uncooperative. We have no objections to obtaining new contact information as long as it can be done in a way that honors STARRS commitments to privacy and data security as provided to our respondents.
o The budget for the pilot will be informed by experiences from prior waves, e.g. response rates by phase. However, there are important differences between the prior experience and any potential pilot sample. Mainly, more time has occurred and it may be more difficult to locate and contact participants than in the past. This makes it difficult to provide accurate estimates. A key finding from the pilot survey will be more precise estimates of parameters strongly related to the budget.
- Wave 3 Challenges
o Wave 3 consent review and approval process – these risks were described in a September 30 memo to the ODUSA.
- We received USUHS IRB approval. This is no longer a risk.
- The DHA Privacy Board has approved the DSA modification for the MHS HIPAA form; however, we will not receive any sort of VA prior approval. With the VA, we could be in a situation where we employ a VA HIPAA authorization forms that ends up not being acceptable to the VA when it comes time to request data for linkage. While unlikely, it's also possible the approved MHS HIPAA form might not be acceptable to the providers of those data.
- At the moment, we are committing resources to planning a consent process that includes both consent forms. This involves designing and programming these options. Removing one or both consent processes, if we do not receive the appropriate approvals or if there were a change in direction, would require additional design, programming, and testing effort, and might result in a delay of production.
o In implementing a cumbersome consent battery, our response rates are likely to go down for both web and phone interviews.
o HIPAA authorization cannot be provided verbally during CATI interviews. We have established detailed procedures for telephone interviews. It is uncertain how successful gaining the HIPAA consents for CATI respondents will be.
- 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 3 above). As decisions are made, we will work with the research team to schedule and implement this work.
- Pilot study: U-M will prepare a budget for a pilot study in which we attempt to interview 300 non-response cases from the original STARRS-LS sample. If the work as budgeted is approved, then we will prepare a formal change-of-scope memo to document the changes in scope and expected costs. We will monitor our budget, and as we come closer to the end of the contract, we will know whether we can cover the pilot work within existing funding or if we are expecting to exceed the budget. If the latter, we would note that we had changed the scope and then discuss options for covering those costs with the ODUSA and GSC.
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 **Sep 30, 2020**	
Total Cost to Date (Direct + Indirect):	445,441.00
Estimated Cost at Completion (E$AC):	12,796,290.00
Total Budget:	12,808,287.00
Variance (Budget minus E$AC):	13,100.00
Reason For Variance:	We are currently projecting a surplus of $13,100 for the total project, which is a decrease of $390,856 from last month. The decrease in the surplus amount is due to a) most of the remaining staff hours moving from temporary SRO overhead accounts to the STARRS Wave 3 accounts, and b) hours for basic management and Enclave maintenance being added to the last two months of the project's period of performance (SRO's budget assumed a period of performance of March 2020 through February 2025; actual period of performance is May 2020 through April 2025).
Projections **Sep 30, 2020**	
Dollars Projected For Month:	187,262.00
Actual Dollars Used:	307,419.00
Variance (Projected minus Actual):	-120,158.00
Reason For Variance:	All staff hours and non-salary costs have moved over from overhead accounts to the STARRS Wave 3 accounts.

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)
Tuba Suzer-Gurtekin (SCA)

Funding Agency

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

Project Team
Project Lead: Theresa Camelo
Budget Analyst: Dean E Stevens
Production Manager: Lisa J Carn
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:	08/26/2020	**DC End:**	09/28/2020

Other Project Team Members:
Other Project Names:
Sample Mgmt Sys NA
Data Col Tool Blaise 4.8
Hardware Laptop; Desktop; [UM cell] Phone
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	Oct, 2020 (SCA 2020)	**Project Phase**	Implementing

Risk Level *On Track*

Monthly Update OCT SCA began as scheduled on SEPT 30, and ended on schedule on OCT 26. We completed 605 IWs (324/181/100); our goal was 600 (320/180/100) and an overall HPI of 2.95 (0.05 below our budgeted goal of 3.0).

Special Issues

Cost
Nov 13, 2020

Total Cost to Date (Direct + Indirect):	96,965.36
Estimated Cost at Completion (E$AC):	96,965.36
Total Budget:	1,109,882.00
Variance (Budget minus E$AC):	-4,475.19
Reason For Variance:	higher than expected training costs

Projections
Nov 13, 2020

Dollars Projected For Month:	92,490.17
Actual Dollars Used:	96,965.36
Variance (Projected minus Actual):	-4,475.19
Reason For Variance:	higher than expected remote training costs

Measures

	Units Complete	RR	HPI
Current Goal:	600		3.0
Goal at Completion:	605		3.0
Current actual:	605		2.95
Estimate at Complete:	605		2.95
Variance:			-.05

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:*	04/01/2020

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	Oct, 2020 (VCT)	**Project Phase**	Closing

Risk Level | *On Track*

Monthly Update

The team continues to meet regularly to discuss analyses that Tian and Kallan are doing.

Work continues on the first findings paper based on the 2020 AAPOR presentation.

Andrew and Kallan are working on a paper on respondent burden that will use some data from the video project.

Andrew met with Dean to update cost projections. Overall we are projecting to be about right on target (projecting a slight under run on both budgets).

Andrew worked with DMSS to create a new budget for additional funding for analyses has been submitted to MiCDA. SRO will have oversight on this budget.

After having consulted a few projects on video survey design considerations the group decided to there was a need to write up something about this. Kallan wrote the first draft that the group molded into the first publication. It has been submitted to SurveyPractice and should be coming out in November.

The group is preparing plans for AAPOR related submissions. They include:
-A panel on video at AAPOR (Andrew H. is coordinating and submitting, the panel will consist of...
 --A paper on willingness to participate in video interviews. This is being submitted by the New School. Kallan and I are co-authors.
 --A paper from the European Social Survey (ESS) about their experience augmenting with video in the current wave of ESS.
 --A paper from the American National Election Studies (ANES) about their experience with web and video in their pre- and post-election surveys.
 --A paper on recruitment and participation that Kallan will present (I'm a co-author).

-In addition to the panel, Kallan and Andrew are...
 --Co-authors of a paper on interviewer effects in video interviews that Brady is the lead on (Ai Rene a PhD student will present).
 --Lead authors of a paper on a model for respondent burden that uses data from SCIP, the iPhone study, and the video study

They have also been invited to be part of a ESRA panel on video interviews

Special Issues

Cost
Nov 30, 2020

Total Cost to Date (Direct + Indirect):	349,902.92
Estimated Cost at Completion (E$AC):	376,942.83
Total Budget:	377,455.00
Variance (Budget minus E$AC):	59.17

Reason For Variance:	VM costs are on target. We have adjusted our projections to continue work into January 2021. The postage costs that have been coming through are associated with HRS (the web study is reusing old VCT materials (envelopes).	

The cost information for the MiCDA funds are:
Total Budget: $54,207
Total Cost to Date: $54,118.00
Estimated cost at completion: $54,118.00
Variance: $89.00

Projections
Nov 30, 2020

Dollars Projected For Month:	7,499.92
Actual Dollars Used:	4,614.88
Variance (Projected minus Actual):	2,885.04
Reason For Variance:	The PSM student hours projected for the month did not hit. Those projections have been moved forward.

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

Survey Research Operations

Monthly Project Report

Development Initiative and No Data Collection Projects

October 2020

NonArchived Development Initiative and No-DataCol Projects

Project	Type	Status	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
TSME21- Illume Upgrade (424466)	Initiatives	Current	☐	☐	☐	☐	☐	☐	☐	☐	☐	🟢
TSME21-Blaise 5 Testing (423562)	Initiatives	Current	☐	☐	☐	☐	☐	☐	☐	☐	☐	🟢
TSME21-CARI_Player (425842)	Initiatives	Current	☐	☐	☐	☐	☐	☐	☐	☐	☐	🟢
TSME21-ColdFusion Server Upgrade (425197)	Initiatives	Current	☐	☐	☐	☐	☐	☐	☐	☐	☐	🟢
TSME21-DCO Tech System Support (483248)	Initiatives	Current	☐	☐	☐	☐	☐	☐	☐	☐	☐	🟢
TSME21-QC-Systems (483249)	Initiatives	Current	☐	☐	☐	☐	☐	☐	☐	☐	☐	🟢
TSME21-RCLS (425196)	Initiatives	Current	☐	☐	☐	☐	☐	☐	☐	☐	☐	🟢
TSME21-Replayer (425267)	Initiatives	Current	☐	☐	☐	☐	☐	☐	☐	☐	☐	🟢
TSME21-SelfSchedUI	Initiatives	Current	☐	☐	☐	☐	☐	☐	☐	🟢	🟡	🟡
TSME21-ST international (483227)	Initiatives	Current	☐	☐	☐	☐	☐	☐	☐	☐	☐	🟢

Developmental Initiatives

SelfSchedUI Self-Scheduling Interface for MSMS
ST international
Ilume Upgrade
QC-Systems
Replayer
Blaise 5 Testing
CARI_Player
ColdFusion Server Upgrade
DCO Tech System Support (
RCLS

Project Name	Self-Scheduling Interface for MSMS (TSME21-SelfSchedUI)
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

Project Status Current

Budget	*Direct Budget:*	30,000.00	*InDirect Budget:*	0.00	*Total Budget:*	30,000.00

Principal Investigator/Client

Funding Agency

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

Project Team   *Project Lead:*   Andrew L Hupp
                    Budget Analyst: Megan Gomez-Mesquita
                    Production Manager:
                    Senior Project Advisor:
                    Production Manager:
                    Production Manager:

Proposal #:   no data

Description: This technical initiative will create an outward (respondent) facing interface for participants to schedule an appointment in MSMS. Initially an interface with core functionality that all projects will benefit from will be built out. We will leverage existing work from the prior self-scheduling application (developed by PSID) to define a core set of functionality. An additional functionality list based on feedback about the existing scheduler, needs from other projects and organizational needs will be developed. We will work with the stakeholder group to prioritize that list and add the additional functionality as funding allows.

Work involves the development of the outward facing interface as well as related MSMS core work.

SRO Project Period 07/2020 - 06/2021

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:
James Rodgers - Tech Lead
Holly Ackerman - Developer
Dave Padot - Development consultation

Stakeholder team
Kallan Larsen - Alternative scheduling representative
Heather Schroeder - Stat Unit/Reporting representative
Pooja Varma-Laughlin - SSL representative
Gary Hein - HRS representative
Maryam Buagelia - PSID representative
Stacy Quisenberry - DCO/HRS/PSID representative

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	Oct, 2020 (TSME21-SelfSchedUI)	**Project Phase**	Planning

Risk Level   *Some Concerns*

Monthly Update

Work to date has involved some design discussions between Jim and Andrew. They went through the existing development cards related to appointments and decided on an order of development. Additional development cards will be written as we go. Andrew is working on documentation. Andrew, Heather S, and Jim met to discuss appointments currently and possible enhancements to the DCA UI to help answer/classify appointments in reporting.

Minimal development work happened in October due to competing MSMS demands from existing and new projects. The first set of scheduled work is core related and will likely not show much "visible" progress (like the R UI would) We are still planning on delivering a core UI that can be used, but additional work will likely continue after the PSID launch.

It's clear that additional resources are needed. TSG is looking for a resource to help with the respondent facing UI while Holly continues with the MSMS core related work. Indications are it will be Peter Sparks, but there is no official word yet. Cost projections have been updated with hours projected for Peter rather than Holly to see what the impact on the budget will be.

Andrew reached out to Marcus to see if he knew of (or could send a message to the larger UM ITS community asking about) any products already available within the UM community that we could possibly leverage to reduce development time. We know VCT used Calendly and that could possibly be an option, or we could decide to try an use other native scheduling features. Regardless of method, the front end developer will need to have it set-up so it can be connected with the work Holly is doing.

Special Issues

Mainly worried about (programming) resource availability in the coming months to accomplish base work to have a useable project at the launch of PSID.

Cost
Nov 30, 2020

Total Cost to Date (Direct + Indirect):	1,065.36
Estimated Cost at Completion (E$AC):	27,095.95
Total Budget:	30,000.00
Variance (Budget minus E$AC):	2,904.05
Reason For Variance:	We are planning on using all of the funds.

Projections
Nov 30, 2020

Dollars Projected For Month:	3,396.09
Actual Dollars Used:	498.72
Variance (Projected minus Actual):	2,897.37
Reason For Variance:	(Programming) resource availability is an issue. Some core related work is just beginning due to competing MSMS demands from existing and new projects. We are waiting on a TSG to assign a resource.

Measures

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

Other Measures

Project Name	TSME21 - ST international (TSME21-ST international (483227))		
Project Mode	Primary: Not Available		

Project Type	Developmental Initiatives	**Project Status**	Current

Budget	***Direct Budget:*** 40,000.00	***InDirect Budget:*** 0.00	***Total Budget:*** 40,000.00

Principal Investigator/Client

Funding Agency

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

Project Team   ***Project Lead:***   Gina-Qian Yang Cheung
          Budget Analyst: Janelle P Cramer
          Production Manager:
          Senior Project Advisor:
          Production Manager:
          Production Manager:

Proposal #:   no data

Description: The ongoing development project, maintain the SRO international domain system infrastructure and support new feature development

SRO Project Period   07/2020 - 06/2021

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: LihShwu, Genise, Sarah, Cheng, Marsha, Pam, and Gina

Other Project Names: TSME21 - ST international

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	Oct, 2020 (TSME21-ST international (4	**Project Phase**	Implementing

Risk Level   *On Track*

Monthly Update   we are using the funds to support FUM and WSMS development.

Special Issues

Cost
Nov 13, 2020

Total Cost to Date (Direct + Indirect):	10,739.00
Estimated Cost at Completion (E$AC):	40,000.00
Total Budget:	40,000.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	no issues

Projections
Nov 13, 2020

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	no issue

Measures

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

Other Measures

Project Name	TSME21- Illume Upgrade (4424466) (TSME21- Illume Upgrade (424466))
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

Project Status Current

Budget **Direct Budget:** 10,000.00 **InDirect Budget:** 3,000.00 **Total Budget:** 13,000.00

Principal Investigator/Client

Funding Agency

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

Project Team *Project Lead:* Hueichun Peng
Budget Analyst:
Production Manager:
Senior Project Advisor: Meredith A House
Production Manager:
Production Manager:

Proposal #: no data

Description: This is the plan to create a 2nd environment for Illume.Next version for Illume version upgrade

SRO Project Period 07/2020 - 06/2021
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: Illume Upgrade
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 Oct, 2020 (TSME21- Illume Upgrade (4. **Project Phase** Planning

Risk Level *On Track*

Monthly Update We are starting to meet to plan ahead for the upgrade. Depending on the resource availability, we might seek the consulting/support from DatStat to set up the new environment for the latest Illume.Next version.

Special Issues

Cost
Nov 16, 2020

Total Cost to Date (Direct + Indirect):	1.00
Estimated Cost at Completion (E$AC):	13,000.00
Total Budget:	13,000.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	na

Projections
Nov 16, 2020

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

Measures

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

Other Measures

Project Name	TSME21 QC-Systems (483249) (TSME21-QC-Systems (483249))			
Project Mode	Primary: Not Available			
Project Type	Developmental Initiatives		**Project Status**	Current
Budget	*Direct Budget:* 25,000.00	*InDirect Budget:* 5,000.00	*Total Budget:* 30,000.00	

Principal Investigator/Client

Funding Agency

IRB	*HUM#:*	*Period Of Approval:*
Project Team	*Project Lead:*	Sarah Elisa Broumand
	Budget Analyst:	
	Production Manager:	
	Senior Project Advisor:	Gina-Qian Yang Cheung
	Production Manager:	
	Production Manager:	

Proposal #: no data

Description: This is the QC Systems project that covers mostly QC tool development and support such as Olive.

SRO Project Period 07/2020 - 06/2021

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	Oct, 2020 (TSME21-QC-Systems (483:	**Project Phase**	Implementing

Risk Level *On Track*

Monthly Update Most of this budget has been allocated to support the QC Implementation team. Currently we are not actively working on any changes to Olive. The hours consumed are for meetings. However we expect to pick up releasing new features by the new year and anticipate needed changes due to a possible impact of using the new CARI for 5.8 that will be used first on PSID21.

Special Issues none

Cost
Oct 31, 2020

Total Cost to Date (Direct + Indirect):	4,005.92
Estimated Cost at Completion (E$AC):	23,395.59
Total Budget:	30,000.00
Variance (Budget minus E$AC):	6,604.41
Reason For Variance:	The remaining budget will be re-allocated by the next monthly report.

Projections
Oct 31, 2020

Dollars Projected For Month:	2,423.71
Actual Dollars Used:	816.24
Variance (Projected minus Actual):	1,607.47
Reason For Variance:	Work on this project has been postponed to focus on higher priority items

Measures

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

Other Measures

Project Name	TSME21_Replayer (TSME21-Replayer (425267))				
Project Mode	Primary: Not Available				
Project Type	Developmental Initiatives		**Project Status**	Current	
Budget	*Direct Budget:*	5,000.00	*InDirect Budget:*	0.00	*Total Budget:* 5,000.00

Principal Investigator/Client

Funding Agency SRC and HRS

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

Project Team
Project Lead: Jennifer C Arrieta
Budget Analyst: Janelle P Cramer
Production Manager:
Senior Project Advisor: Gina-Qian Yang Cheung
Production Manager:
Production Manager:

Proposal #: no data

Description: In collaboration with HRS, develop a utility:
-For production data review for Blaise 5 projects,
-That takes into account needs and design by multiple stakeholders,
-That is agnostic of sample management systems, and
-That has an underlying structure in place for future enhancements and continued Blaise 5 development.

SRO Project Period 09/2019 - 06/2021
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: Youhong Liu, Colette Keyser, Jason Ostergren

Other Project Names: Replaher

Sample Mgmt Sys NA
Data Col Tool NA
Hardware Desktop
DE Software N/A
QC Recording Tool N/A
Incentive Not used
Administration N/A
Payment Type N/A
Payment Method N/A

Report Period Oct, 2020 (TSME21-Replayer (425267) **Project Phase** Implementing

Risk Level *On Track*

Monthly Update During the month, the team focused on programming and testing bug fixes and new features in the Replayer utility. In addition, the team presented on and demo'd the utility at a project review.

Special Issues

Cost
Oct 31, 2020

Total Cost to Date (Direct + Indirect):	1,313.00
Estimated Cost at Completion (E$AC):	4,643.00
Total Budget:	5,000.00
Variance (Budget minus E$AC):	357.00
Reason For Variance:	Minimal variance

Projections
Oct 31, 2020

Dollars Projected For Month:	364.00
Actual Dollars Used:	364.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	No variance

Measures

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

Other Measures

Project Name	TSME21-Blaise 5 Testing (423562) (TSME21-Blaise 5 Testing (423562))
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

Project Status   Current

Budget	*Direct Budget:*	30,000.00	*InDirect Budget:*	0.00	*Total Budget:* 30,000.00

Principal Investigator/Client

Funding Agency

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

Project Team   *Project Lead:*   Gina-Qian Yang Cheung
                  Budget Analyst: Janelle P Cramer
                  Production Manager:
                  Senior Project Advisor:
                  Production Manager:
                  Production Manager:

Proposal #:   no data

Description: This project has been moved from the MSMS budget to TSME this FY. The budget is for mainly Blaise new features testing.

SRO Project Period   07/2020 - 06/2021
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	Oct, 2020 (TSME21-Blaise 5 Testing (4 **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	Due to resource limitations, the project is going slow. will spend more time to test Blaise 5.9 after the new year
Special Issues	

Cost
Nov 13, 2020

Total Cost to Date (Direct + Indirect):	4,288.00
Estimated Cost at Completion (E$AC):	30,000.00
Total Budget:	30,000.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	No issue

Projections
Nov 13, 2020

Dollars Projected For Month:		0.00
Actual Dollars Used:		0.00
Variance (Projected minus Actual):		0.00
Reason For Variance:	No issue	

Measures

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

Other Measures

Project Name	TSME21-CARI_Player (425842) (TSME21-CARI_Player (425842))
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

Project Status Current

Budget	*Direct Budget:*	10,000.00	*InDirect Budget:*	0.00	*Total Budget:* 10,000.00

Principal Investigator/Client

Funding Agency

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

Project Team
Project Lead: Gina-Qian Yang Cheung
Budget Analyst: Janelle P Cramer
Production Manager:
Senior Project Advisor:
Production Manager:
Production Manager:

Proposal #: no data

Description: This is a small budget development. Due to SSL remote working sitting, we have implemented a new utility, called CARi_player, for both SCA CARI (in Blaise 4.8) and STARRS-LS W3 (in Blaise5)

SRO Project Period 09/2020 - 01/2021

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	Oct, 2020 (TSME21-CARI_Player (425&	**Project Phase**	Implementing

Risk Level *On Track*

Monthly Update It is going well on this small development. SCA is going to conduct a production test using Blaise CARI.

Special Issues

Cost
Nov 13, 2020

Total Cost to Date (Direct + Indirect):	2,316.00
Estimated Cost at Completion (E$AC):	10,000.00
Total Budget:	10,000.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	no issue

Projections
Nov 13, 2020

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	no issue

Measures

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

Other Measures

Project Name	TSME21-ColdFusion Server Up425197) WebTrak/WebLog - upgrade Web App (TSME21-ColdFusion Server Upgrade (425197))
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

Project Status Current

Budget	*Direct Budget:*	10,000.00	*InDirect Budget:*	1.00	*Total Budget:* 10,000.00

Principal Investigator/Client

Funding Agency

IRB	*HUM#:*		*Period Of Approval:*
Project Team	*Project Lead:*	Hueichun Peng	
	Budget Analyst:		
	Production Manager:	HollyJoyce Stewart Ackerman	
	Senior Project Advisor:	Gregg Peterson	
	Production Manager:		
	Production Manager:		

Proposal #:	no data
Description:	This initiative plans to upgrade the CF server for Web Logging and PIPPA.

SRO Project Period	07/2020 - 06/2021
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:	ColdFusion Server Upgrade
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	Oct, 2020 (TSME21-ColdFusion Server

Project Phase Planning

Risk Level	*On Track*
Monthly Update	We plan to implement this Jan 2021 ~ April 2021. We do have some concern as Holly has been extremely busy. We wish to seek Sean's help for some technical exporation.
Special Issues	

Cost **Nov 16, 2020**	*Total Cost to Date (Direct + Indirect):*	1.00
	Estimated Cost at Completion (E$AC):	10,000.00
	Total Budget:	10,000.00
	Variance (Budget minus E$AC):	0.00
	Reason For Variance:	na

Projections
Nov 16, 2020

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

Measures

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

Other Measures

Project Name	TSME21-DCO Tech System Support (483248) (TSME21-DCO Tech System Support (483248))
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives
Project Status	Current

Budget	*Direct Budget:*	25,000.00	*InDirect Budget:*	1.00	*Total Budget:*	25,000.00

Principal Investigator/Client

Funding Agency

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

Project Team	*Project Lead:*	Vivienne Y Outlaw
	Budget Analyst:	
	Production Manager:	Hueichun Peng
	Senior Project Advisor:	Gregg Peterson
	Production Manager:	
	Production Manager:	

Proposal #:   no data

Description: This includes all the support and development work for a suite of tech systems DCO uses, including Fred, Recruitment Website, Iwer Web Site, etc.

SRO Project Period   07/2020 - 06/2021

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: DCO Tech System Support

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	Oct, 2020 (TSME21-DCO Tech System	**Project Phase**	Initiation

Risk Level   *On Track*

Monthly Update   Work have been done includes (1) implementing updates in Iwer Websites and Fred for First of the Year Check-In; (2) a new batch of reports.

Special Issues

Cost
Nov 13, 2020

Total Cost to Date (Direct + Indirect):	4,737.24
Estimated Cost at Completion (E$AC):	25,000.00
Total Budget:	25,000.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	na

Projections
Nov 13, 2020

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

Measures

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

Other Measures

Project Name	TSME21-RCLS (TSME21-RCLS (425196))
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

Project Status Current

Budget	*Direct Budget:* 15,000.00	*InDirect Budget:* 0.00	*Total Budget:* 15,000.00

Principal Investigator/Client

Funding Agency

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

Project Team   *Project Lead:*   Jim Rodgers
Budget Analyst:
Production Manager:
Senior Project Advisor:
Production Manager:
Production Manager:

Proposal #:   no data

Description: This project will allow MSMS, Blaise SMS, and WebSMS to update RCLS as respondent contact information is updated in each SMS. This provides 800 line staff with current contact information in their use of RCLS as they look up and identify the correct respondent against which call records can be recorded.

SRO Project Period   07/2020 - 06/2021

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: Respondent Lookup

Sample Mgmt Sys   SurveyTrak; SMS; Web SMS; MSMS

Data Col Tool   NA

Hardware   Other (MSMS and SuveyTrak servers)

DE Software   NA

QC Recording Tool   NA

Incentive   Not used

  Administration   N/A

  Payment Type   N/A

  Payment Method   N/A

Report Period	Oct, 2020 (TSME21-RCLS (425196)) **Project Phase** Implementing
Risk Level	*On Track*

Monthly Update   Core MSMS work completed. Next step is to write data from ODS to RCLS when contact info changes in MSMS and is exported to ODS.

Special Issues

Cost
Oct 31, 2020

Total Cost to Date (Direct + Indirect):	2,862.00
Estimated Cost at Completion (E$AC):	15,000.00
Total Budget:	15,000.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	No variance

Projections
Oct 31, 2020

Dollars Projected For Month:		46.00
Actual Dollars Used:		46.00
Variance (Projected minus Actual):		0.00
Reason For Variance:	No variance	

Measures

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

Other Measures