Survey Research Operations

Monthly Project Report

Sponsored

December 2020



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 HID) MTF High Intensity Drinking

(MTF Vaping Project) MTF Vaping Project

(NCCS 2021) National Campus Climate Survey

(NSFG 2010-2020) National Survey of Family Growth

(PSID21) Panel Study of Income Dynamics 2021

(CDS-19) PSID Child Development Supplement V (2019)

(WMH-Qatar) Qatar World Mental Health Survey

(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

Projects Report Query/Monthly Update Quick Reference

Select Calendar Year 2020 ∨

Project	Туре	Status	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
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					<u></u>		•					
DAWN CS	Sponsored	Current												
ECHO	Sponsored	Current									•	<u></u>	<u></u>	<u></u>
EDCPE	Sponsored	Current	<u></u>			<u></u>	<u></u>				<u></u>		<u></u>	<u></u>
EDC-Semi Structured	Sponsored	Current												
H&WB	Sponsored	Current	<u></u>	<u></u>	<u></u>	•	<u></u>		0	•	<u></u>	<u></u>	<u></u>	<u></u>
HCAP 2020	Sponsored	Current												
HCDC, H&C	Sponsored	Current	<u></u>		<u></u>	<u></u>	<u></u>							
HRS 2020	Sponsored	Current	<u></u>	<u></u>	•		<u></u>	<u></u>	<u></u>	•	<u></u>	<u></u>	<u></u>	<u></u>
HRS 2020 ABT	Sponsored	Current									<u></u>	<u></u>	<u></u>	<u></u>
IHDS3	Sponsored	Current												
MARS 2	Sponsored	Current												
MTF base year 2017-2022	Sponsored	Current												
MTF HID	Sponsored	Current												
ITF Panel (main data collection) 2020	Sponsored	Current												
MTF Vaping Project	Sponsored	Current												
NCCS 2021	Sponsored	Current												
NSFG 2010-2020	Sponsored	Current												
PSID21	Sponsored	Current											<u></u>	<u></u>
SCA 2020	Sponsored	Current												
STARRS-LS Waves 3 & 4	Sponsored	Current												
VCT	Sponsored	Current												
WMH-Qatar	Sponsored	Current												

Project Name ACLLIFE Life History Interview and Validation (ACLLIFE) (ACL-LIFE)

Project Mode Primary: Telephone

Project Type Sponsored Projects Project Status Current

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

Principal

Investigator/Client

Sarah Burgard (SRC, Population Studies / Sociology / Epidemiology)

Funding Agency

IRB HUM#: Period Of Approval:

Project TeamProject Lead:Terri Ann RidenourBudget 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 Data Col Period Security Plan Milestone Dates 04/2020 - 08/2021 02/2021 - 08/2021

NA

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

Shonda Kruger-Ndiaye: SPA

Team Members: 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 SysSurveyTrakData Col ToolBlaise 4.8HardwareLaptop; Desktop

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

Dec, 2020 (ACL-LIFE)

Project Phase

Planning

Risk Level

Some Concerns

Monthly Update

SRO's pre-production work continues. The contingent staffing plan is confirmed and we've updated our projections to reflect the hybrid staffing model. Significant progress has been made on SurveyTrak, technical systems development and testing. Blaise instrument programming is proceeding slowly, due to staff resource availability this month, and demands on another priority admin project.

In January, priorities have shifted to Blaise instrument refinement and testing (including life-history grid functionality), WebLog: Locating project development, reporting and integrated testing. In parallel, the project team is developing the ACL-Life Canvas site training modules, writing the study guide, preparing materials and providing instructional support for trainers to deliver remote training in mid-February.

The Study Office is awaiting approval of their IRB application, including study protocols and data collection instruments. The SRO project team is preparing for the pre-interview mailing (letter and consent overview), life-history grid and respondent booklet..

The study office delivered the ACL-Life sample preload file and will soon send updates. Carlos and Chris (data managers) prepared preliminary analysis of the sample to understand characteristics and preparing for data collection. They also reviewed the quality of data and identified inconsistencies the study office data manager is working to resolve.

Special Issues

Cost

Jan 13, 2021

Total Cost to Date (Direct + Indirect):144,948.36Estimated Cost at Completion (E\$AC):749,646.56Total Budget:734,193.00Variance (Budget minus E\$AC):-15,453.56

Reason For Variance:

We currently project a cost overrun. There are two main drivers of this overrun: additional Blaise programming hours and increased rates of Field lwers staffed on the project.

Our future projections now reflect an increase in 153 hours for programming the Blaise instrument, including the life-history calendar grid functionality requested by the PI. Projections also include the current hybrid staffing plan (8 SSL lwers; 8 Field lwers; and 2 Field TLs). The higher rates of Field staff (vs. SSL staff budgeted) contribute to the projected overrun balance.

Projections Jan 13, 2021

Dollars Projected For Month: Actual Dollars Used: Variance (Projected minus Actual): 33,551.05 28,570.78 4,980.27

Reason For Variance:

The Blaise, SurveyTrak and Weblog programmers assigned to work on this project continue to get pulled in many different directions, with competing

priorities. Programming hours will shift to the January cost report.

Measures

	Units Complete	RR	HPI	
Current Goal: Goal at Completion:	1,034 (n=1,292)	80%	5	
Current actual: Estimate at Complete:				
Variance:				

Project Name ALS Matched Control Recruitment (ALS Controls)

Primary: Web **Project Mode**

Project Status Project Type Sponsored Projects Current

Budget Direct Budget: 193,780.00 InDirect Budget: 108,518.00 Total Budget: 302,298.00

Principal

Steven Goutman (Univ of Michigan - Med School) Investigator/Client

Funding Agency

HUM#: HUM00148060 Period Of Approval: **IRB**

Rebecca Loomis **Project Team** Project Lead:

> Budget Analyst: Megan Gomez-Mesquita

Production Manager:

Senior Project Advisor: Peter Rakesh Batra

Production Manager: Production Manager:

no data Proposal #:

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

Data Col Period Security Plan **Milestone Dates** 01/2020 - 12/2023 09/2020 - 10/2023

Dan Zahs (Sampling)

NA

PreProduction Start: Pretest Start:

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

Other Project

Team Members:

Other Project

Names:

Sample Mgmt Sys

NA

Data Col Tool Other (Qualtrics)

Hardware NA **DE Software** NA **QC Recording Tool** NA Incentive

Yes, R

ISR Group (SRC Business Office) Administration

Payment Type Check, post (10)

Payment Method NA

Report Period Dec, 2020 (ALS Controls) **Project Phase** Implementing

Risk Level On Track

December: The project continues to be on hold and may remain inactive for a few months until we get a clear **Monthly Update**

indication from the PI that we are able to start up again. (This is mainly due to the fact that the two hospitals participating in the blood draws have stopped any non-essential service because of the increased Covd-19 cases.) Talks continue with the PI team regarding strategies once we resume regular mailings.

November: The PI had decided to skip the December mailing in consideration of respondents being overloaded with holiday mail, and to send a double batch in January. The November mailing had been sent to PrintCopyMail for printing and assembly but the week before the letters were scheduled to be mailed out, COVID spikes in Grand Rapids and Midland resulted in restrictions on tier 2 research studies. Respondents who completed the screening survey and were subsequently consented by Michigan Medicine can no longer be sent to the two area hospitals for

blood draws. As a result, SRO mailings for this project are on hold until Michigan Medicine is allowed to proceed. A small number of completions from the October invitation letters continue to trickle in, requiring TOA checks to be printed and mailed.

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 Jan 11, 2021

Total Cost to Date (Direct + Indirect): 2,897.92
Estimated Cost at Completion (E\$AC): 173,536.99
Total Budget: 302,298.00
Variance (Budget minus E\$AC): 128,761.01
Reason For Variance: The variance is holding a

The variance is holding at this rate as the project is on hiatus. Once we are able to resume sending sample out to the field, we can establish a clearer picture of response rates and costs.

The full project scope and amount of work has not been fully projected out as we won't know about response rates until we have several month's worth of sample sent out to the field. Response to that will determine if we need to increase our mailings or use other methods to increase responses.

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 Jan 11, 2021

 Dollars Projected For Month:
 0.00

 Actual Dollars Used:
 0.00

 Variance (Projected minus Actual):
 0.00

 Reason For Variance:
 none

Measures

Current Goal:
Goal at Completion:
Current actual:
Estimate at Complete:
Variance:

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 Brady West (Survey Research Center)

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

Funding Agency

IRB

National Institutes of Health (NIH)

HUM#: 00167171 Period Of Approval:

Project TeamProject Lead:Rebecca GatwardBudget Analyst:Dean E StevensProduction 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 Data Col Period Security Plan Milestone Dates

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

NA

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

Names:

SRO Team: Leah Roberts, Andrew Hupp, Matt Hanger, Neil Erikson, Pooja Varma-Laughlin, Jim Rodgers, Keith

Team Members: Liebetreu, Colette Keyser

Other Project

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'.

MSMS Sample Mgmt Sys **Data Col Tool** Blaise 5; SAQ Desktop Hardware

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

QC Recording Tool

DE Software

Incentive

N/A Yes, R Administration **SRO Group**

Payment Type Payment Method Check, post (Modules 1 - \$20, Module 2 - \$20 and Module 3 - \$30); Cash, prepaid (Screener IW - \$2 Potentially Check through STrak RPay System; Check through other system (Info. from MSMS and transfer information via

Report Period

Dec, 2020 (AFHS)

Project Phase

Implementing

Risk Level

On Track

Monthly Update

December update

- The costs for various design changes and increasing the sample size were provided to the PIs to inform decision making about design chages for Replicate 2.
- The PI group have decided on design changes for Replicate 2 projections and non-salary costs (from DataForce) will be entered in CRS.
- Reminder call outcome We are continuing to work on adding a field to code the 'outcome' of the reminder calls (when contact is made with the respondent). Observations from this call are currently summarised in a 'contact note'. The new variable will be used for reports and monitoring.

Special Issues

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

on USPS.

Cost

Jan 11, 2021

Total Cost to Date (Direct + Indirect): 1,246,482.70 Estimated Cost at Completion (E\$AC): 2,273,535.83 Total Budget: 2,490,133.00 Variance (Budget minus E\$AC): 216.597.17

The estimated cost at completion has been updated for December -Reason For Variance:

however, the projected underspend will be used to increase the sample size by around 3,000 for Replicate 2. The PIs have also made decisions about changes to the design for replicate 2. Dean is currently working on entering

these extensive updates to the projections.

Projections Jan 11, 2021

Dollars Projected For Month: 47,962.29 Actual Dollars Used: 36,785.27 Variance (Projected minus Actual): 11,177.02

Reason For Variance: The projected vs actuals has not yet bee updated for December. (1/19/21)

Measures

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

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

Budget Analyst:Grace TisonProduction 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 Data Col Period Security Plan **Milestone Dates**

09/2018 - 09/2019 04/2018 - 08/2019

NA

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-Ndiave: 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 SurvevTrak Data Col Tool Blaise 4.8 Desktop Hardware **DE Software** NA QC Recording Tool NA Incentive Yes, R

Administration **SRO Group**

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

Payment Method NA

Report Period Dec, 2020 (ACL6) **Project Phase** Implementing

Risk Level Some Concerns

Monthly Update ACL6 data collection is currently paused.

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

Dec 31, 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 Dec 31, 2020

Dollars Projected For Month:

Actual Dollars Used:

Variance (Projected minus Actual):

-69.79

-69.79

Reason For Variance:

No activity this month. The FA believes we don't have any outstanding respondent token checks based on the Tableau report for outstanding checks. However, it is possible that over the next few months we may see 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: Goal at Completion:	1,058 (1,526 sample)	80%	5	
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 Dr. Greg Duncan (University of California - Irvine)

Investigator/Client Dr. Kimberly Noble (Teachers College Columbia University)

Dr. Katherine Magnuson (University of Wisconsin)

Funding Agency

Description:

IRB

National Institute of Child Health and Human Development (NICHD)

*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

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

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)

Colette Keyser (Blaise) Tricia Blanchard (MSMS) Kyle Goodman (Help Desk)

Other Project

HHICD Household Income and Childhood Development

Names:

Sample Mgmt Sys MSMS Data Col Tool Blaise 5

Hardware Laptop; [UM cell] Phone

DE Software N/A

QC Recording Tool Of

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

Dec, 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 treatment and control groups. We are also slowing down the release of the Treatment/Higher income group to balance groups better on time of completion with respect to the children's 2nd birthday (the T group is consistently faster in completing / families in T group are interviewed at a younger age of focal children). There will be no in-person data collection in Age 2 nor Age 3, however, BFY has been approved by U-M to restart in-person locating visits. We are awaiting the approval of the site IRBs (TCCU and NYSPI) to restart locating. The holiday mailout of gifts for participants has been extremely successful - over the holidays we have completed 9 interviews attributed to the gift and received at least 4 call-ins from Moms who received the gift. We've had our 3rd Age 2 iwer attrition (due to permanent job) and are working on the interviewer retention bonus program. Some of the BFY interviewers will be asked to help with the HRS Covid Antibody study which will provide more hours as well. Work on Age 3 is due to start at the end of January. Preliminary scope of Age 3 includes a maternal survey similar to Age 2 administered via phone. U-M interviewers will be also likely to stay in touch with Moms after the Age 3 interview and invite them to the lab visits at age 3.5.

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

	Goal	Actu	al	+/-
Overall	468	473	5	
Nebraska		132	141	9
New York		122	127	5
Minnesota		62	62	0
Louisiana		152	143	-9

Staffing:

Age 2 Staffing:

13 iwers in total (-3 from 16 in September)

NE: 1 attriiton; 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: 3 (1 attrition due to fulltime job, 1 attrition after PIP, 2 Enrollment NH and 1 OS / 2 from Jan 2020 hire)

Locators: 2 (OS, one with shared responsibilty as a traveler)"

Technical system: BFY has implemented a verification protocol and a few stand-alone tasks to help with MCDI reminders. Work on Age 3 is due to commence at the end of January but we don't anticipate expansive development.

Finances: Total project overrun has increased since communicated to the PIs which is a concern. November increase has been due to changes in indirect projections. In December we had savings among Management (vacation, etc.) which were offset by higher billing by TLs and the expense of sending participants' gift (\$4000 approved by the PIs).

Special Issues

Cost

Jan 31, 2021

 Total Cost to Date (Direct + Indirect):
 4,849,038.87

 Estimated Cost at Completion (E\$AC):
 6,838,705.23

 Total Budget:
 6,127,698.00

 Variance (Budget minus E\$AC):
 -410,380.07

Reason For Variance: Current projected overrun of -410K is \$15K higher than the amount

communicated to the PIs in October 2020. In November, the overrun increased to \$404K due to under-projection of indirect costs. In December, monthly savings in Management were offset by other costs specified below

(some approved by the PIs).

Projections Jan 31, 2021

Dollars Projected For Month:78,887.66Actual Dollars Used:76,014.33Variance (Projected minus Actual):2,873.33

Reason For Variance: Due to U-M closure, full December recharges will be allocated to the project

in January.

Measures

	Units Complete	RR	HPI	
Current Goal:	468	_	11	
Goal at Completion:	900	_	11	
Current actual:	473	_	6.2	
Estimate at Complete:	900	_	7	
Variance:				

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: 1,092,924.28 InDirect Budget: 284,160.14 Total Budget: 1,377,084.42

Principal Dr. Steven Broglio (U of M Kinesiology)

Investigator/Client 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 LokersProduction Manager:Kathleen S LadronkaSenior 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 Data Col Period Security Plan Milestone Dates 12/2018 - 05/2021 02/2019 - 03/2021

NA

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

Other Project Team Members: Donnalee Grey-Farquharson, Kathy LaDronka, William Lokers, Hongyu Johnson, Keith Leibetreu, James Koopman

Other Project Names:

Sample Mgmt Sys Other (QuesGen)
Data Col Tool Other (QuesGen)

Hardware Laptop

DE Software External vendor (QuesGen)

QC Recording Tool N/

Incentive Yes, Other (Managed by Consortium)

Administration SRO Group

 $\begin{array}{ll} \textbf{Payment Type} & \textbf{N/A} \\ \textbf{Payment Method} & \textbf{N/A} \end{array}$

Report Period

Dec, 2020 (C.A.R.E.)

Project Phase

Implementing

Risk Level

On Track

Monthly Update

Project Management:

- Data collection has extended to March 2021. Projection and budget are reflected in the current figures. With this plan, post data collection work will continue into May 2021.
- Development continues on the management system as does its documentation and the updating of field protocols.

Data Manager:

- Continue to refine reporting and QC systems and tools.

Questionnaire:

Tested new version of Survey

System

- continue to spec and test updates to management system

Data Production:

- Emphasis on locating. Working on alternative options to assist locating team.
- Developing optimal strategy for the final three months of production
- Another release (7) of 747 cases was received in December

Production Stats as of 12/31/2020:

Overall RR: 34.60%

Total Released Cases: 7687 Total Complete IW: 2471

Total Complete WEB IWs = 2273; CATI Comp Iws= 198

Special Issues

Cost

Dec 31, 2020

 Total Cost to Date (Direct + Indirect):
 1,063,847.89

 Estimated Cost at Completion (E\$AC):
 1,351,192.68

 Total Budget:
 1,377,084.42

 Variance (Budget minus E\$AC):
 25,891.55

Reason For Variance: Projection will be adjusted to reflect the full work scope for three months

data collection extension.

Projections

Dec 31, 2020

Dollars Projected For Month:77,621.02Actual Dollars Used:54,247.93Variance (Projected minus Actual):23,373.09

Reason For Variance: Field hours are a lot less than projected.

Measures

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

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

PrincipalKristine Ajrouch (Life Course Development Program, ISR)Investigator/ClientToni 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: Teahraid Levell

Production Manager:Taghreid LovellSenior 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
Data Col Period
Security Plan
Milestone Dates

10/2020 - 05/2021 12/2020 - 04/2021

NA

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 Ian Ogden, Kasyera Kowalczyk, Lisa Van Havermaet, Ashwin Dae, Jeffrey Smith, David Dybicki, John Gawlas, Brad

Team Members: Goodwin
Other Project D-AMP CS

Names:

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 Dec, 2020 (DAWN CS) Project Phase Implementing

Risk Level On Track

Monthly Update Overall, our field team has finalized 121 main interviews. There are four scheduled appointments for this week. So far,

five respondents have completed the Qualtrics self-scheduler and have asked to be called this week to complete the interview. Finally, one respondent has called the 800 Line. All these have been notified to the interviewers who are

holding those sample lines.

To date, interviewers have charged a total of 443 of the 2,078 working hours available for production. Since launching the survey, the field team has completed 19% of the completed interview goal and charged 21.3% of all available

hours. The projected HPI for SRS sample is 3 and the current HPI has climbed to 3.89.

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.

There are currently 66 sample lines that interviewers have not been able to reach due to phone numbers that are permanently or temporarily disconnected or phone number that do not exist. Interviewers have made multiple attempts (at least 7) on each of these lines. SRO has created two files in excel that will be shared with the PI team so they can conduct additional locating efforts, if they wish to do so.

There are also 52 lines currently listed as refusal by respondent or informant. The production manager is working with interviewers on conversion refusal techniques and we will attempt a two more calls on each line. Not counting the completed interviews, lines with non-working phone numbers and refusals, there are 102 lines that interviewers are actively working.

Average interview length is 38.3 minutes. Then table below summarizes the average section level timings from the 103 completed to date. As the data show, the social relations section and the COVID questions are the main drivers of the questionnaire length. Anecdotal evidence from interviewers also suggests that some respondents ask for questions to be repeated several times.

Cost Dec 31, 2020

 Total Cost to Date (Direct + Indirect):
 142,263.00

 Estimated Cost at Completion (E\$AC):
 431,208.00

 Total Budget:
 471,057.00

 Variance (Budget minus E\$AC):
 39,849.00

Reason For Variance: Token Payments and printing/mailing costs from PCM have not yet hit.

Projections Dec 31, 2020

Dollars Projected For Month:103,074.00Actual Dollars Used:71,611.00Variance (Projected minus Actual):31,463.00

Reason For Variance: Token Payments and printing/mailing costs from PCM have not yet hit.

Measures

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

Project Name Environmental Influences on Child Health Outcomes (ECHO)

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

Project Type Sponsored Projects Project Status Current

InDirect Budget: **Budget** Direct Budget: 261,360.00 146,362.00 Total Budget: 407,722.00

Nigel Paneth (Michigan State University) Principal Investigator/Client Michael Elliott (University of Michigan)

Jean Kerver (Michigan State University)

Funding Agency

NIH

HUM#: **IRB**

HUM00139050 Period Of Approval: 10/2/2020-8/13/2021

Terri Ann Ridenour **Project Team** Project Lead: Parina Kamdar **Budget Analyst:**

Production Manager:

Evanthia Leissou Senior Project Advisor: 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 Data Col Period Security Plan

01/2017 - 08/2023 05/2018 - 03/2023

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: lan 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 Dec, 2020 (ECHO) Project Phase Implementing

Risk Level Some Concerns

Monthly Update Re-Engagement Plan

Recruitment in 4 prenatal clinics is active, but progressing very slowly. There have been 26 women recruited since 8/18/20. The team is hopeful that recruitment will continue to pick up as the number of COVID cases decreases, public's confidence in COVID vaccinations increases, and expecting mothers (and their significant others) feel more comfortable with unnecessary exposure and risk associated with engaging in face to face research activities. A new prenatal protocol was recently approved by IRB. It allows women to include their spouse at the 2nd prenatal visit with the recruiter.

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

Production Stats

To date, 870 women have been recruited in clinics. Among those cases, 714 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: 692

3-month sample released: 698 3-Month Interviews Completed: 494

Average Attempts / Iw: 7.6

Iw length: 31.41 Response Rate: 72%

Reason For Variance:

Special Issues

Cost Jan 13, 2021

 Total Cost to Date (Direct + Indirect):
 116,660.94

 Estimated Cost at Completion (E\$AC):
 355,310.51

 Total Budget:
 407,722.00

 Variance (Budget minus E\$AC):
 52,411.49

The project has a significant underrun, which is expected. Due to COVID, and other factors, prenatal enrollment by non-SRO recruiters continues to be very slow (Phase 1).

We are starting to see the impact of recruitment suspension (March-August, 2020). We're expecting a 6-to-8-month period of no new cases being released to the 3M protocol, approximately from February-August, 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 projections for interviewer hours (and participant costs/incentives) based on updated sample release projections. We will continue to monitor trend before we reduce further.

As a result of the six-month recruitment suspension, and overall slow enrollment activity, much of the 3M follow-up data collection workscope (Phase 2) that happens 10 months after recruitment will shift to Project Y6 (September, 2021). In May we will discuss with the client the budget and need for SRC/SRO to use carry forward funds in Y6.

Projections Jan 13, 2021

Dollars Projected For Month:

Actual Dollars Used:

Variance (Projected minus Actual):

Reason For Variance:

29,014.10 26,179.92 3,028.18

We've had to shift Blaise programming Jim is doing to January and possibly February. We're waiting for the client to test and make cuts to the questionnaire, so we can finish updating the 3 month instrument to accommodate the ECHO-wide protocol data collection elements. We have

updated his January and February projections to reflect.

Measures

	Units Complete	RR	HPI	
Current Goal:	See Monthly Updates			
Goal at Completion:	, .			
Current actual:				
Estimate at Complete:				
/ariance:				

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 Y Combinator Research

Investigator/Client 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-MesquitaProduction Manager:Barbara Aghababian-Homburg

Senior Project Advisor: Kirsten Haakan Alcser

Production Manager:Donnalee Ann Grey-FarquharsonProduction 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)

0	At each eligible household, SRO will:
	Confirm participation consent
	Request authorization to access participants' records in administrative data, and contact information for friends
and f	amily 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 se	ending 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 in	ncluded 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
estim	nated 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 Data Col Period Security Plan Milestone Dates 04/2018 - 02/2020 03/2019 - 11/2019

NA

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

Other Project Team Members: 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

EDC Program Evaluation

Names:

YCombinator Research Basic Income Study

Sample Mgmt Sys

Making/Frak Meet

Data Col Tool Hardware

Blaise 4.8 Laptop NA

DE Software QC Recording Tool Incentive

Administration

NA NA NA

Payment Type NA **Payment Method** NA

Report Period

Dec, 2020 (EDCPE)

Project Phase

Units Complete

Closing

Risk Level

Some Concerns

Monthly Update

Production and post production work are complete. Loose ends regarding the budget to be tied up in Jan/Feb 2021.

Special Issues

Cost

Dec 31, 2020

Total Cost to Date (Direct + Indirect): Estimated Cost at Completion (E\$AC): 2,628,601.09 2,625,510.34

Total Budget:

2,615,353.00 -10,157.34

Variance (Budget minus E\$AC): Reason For Variance:

Slight overrun is due to more than expected closeout work associated with

HPI

phone consents and other data management work.

Projections

Dec 31, 2020

Dollars Projected For Month:

-28,458.03 -23,996.91

RR

Actual Dollars Used: Variance (Projected minus Actual):

-4,461.12

Reason For Variance:

Overrun due to more than expected closeout work.

Measures

Current Goal:

Goal at Completion:

Current actual:

Estimate at Complete:

Variance:

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 Stephanie Chardoul (SRO)

Investigator/Client 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-MesquitaProduction 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
Data Col Period
Security Plan
Milestone Dates

05/2020 - 06/2021 08/2020 - 05/2021

NA

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

Karin Schneider, Barb Homburg, Becky Loomis, Kasyera Kowalczyk

Team Members: 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 Dec, 2020 (EDC-Semi Structured) Project Phase Implementing

Risk Level On Track

Monthly Update Because we were doing better on efficiency, PIs requested we add interviews (goal increased from 140 to 155, we

actually completed 156) - we confirmed this would not expend the budget before we initiated this additional interviewing. We completed this set (Phase 1) and will now pause interviewing until April when we will re-interview

those 156 respondents.

Special Issues None other than the project pause described above.

Cost Jan 11, 2021

Total Cost to Date (Direct + Indirect): 205,273.00

Estimated Cost at Completion (E\$AC): 442,987.00

Total Budget: 456,620.00

Variance (Budget minus E\$AC): 13,633.00

Reason For Variance: IWs completed for first phase with better efficiency.

Projections Jan 11, 2021

Dollars Projected For Month:33.08Actual Dollars Used:33,076.00Variance (Projected minus Actual):0.00

Reason For Variance: None

Measures

	Units Complete	RR	HPI	
Current Goal:	140		4	
Goal at Completion:	155			
Current actual:	156		5.6	
Estimate at Complete:				
Variance:				

Project Name Harmonized Cognitive Assessment Protocol, 2020 (HCAP 2020)

Project Mode Primary: Face to Face Secondary: Telephone

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

Funding Agency

IRB HUM#: HUM00099822 Period Of Approval:

Project Team Project Lead: Maureen Joan O'Brien
Budget Analyst: Richard Warren Krause

Production Manager:Dianne G CaseySenior 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 Data Col Period Security Plan

Milestone Dates

01/2020 - 12/2021 07/2020 - 08/2021

n NA

PreProduction Start:
Pretest End:

Staffing Completed:
SS Train Start:
DC Start:

Pretest Start:
Recruitment Start:
SITrain 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

NA

Payment Type Check, prepaid (50); Check, post (25)
Payment Method Check through STrak RPay System

Report Period Dec, 2020 (HCAP 2020) Project Phase Planning

Risk Level On Track

Monthly Update Since last month there is one project update. The HRS PI has asked SRO to provide an estimate of effort for creating

a video training of the HCAP test modules, which could be used by all of the HCAP sister studies. The project lead, SPA, and HCAP project manager met to discuss what was being requested so that SRO can put together an estimate of effort for this task. The project lead is currently working on this. Regarding production start, there is no update from 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 April/May preproduction with a June/July 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

Jan 31, 2021

Total Cost to Date (Direct + Indirect): 184,418.38

Estimated Cost at Completion (E\$AC): 4,104,271.83

 Total Budget:
 4,488,000.00

 Variance (Budget minus E\$AC):
 383,728.17

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 Jan 31, 2021

Dollars Projected For Month:909.49Actual Dollars Used:6,596.30Variance (Projected minus Actual):-7,505.79

Reason For Variance: A staffperson accidentally charged HCAP rather than HRS. He has

corrected his timesheet and the hours will show has hitting the correct

project next month.

Measures

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

Project Name Health and Retirement Study 2020 (HRS 2020)

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

Project Type Sponsored Projects Project Status Current

Direct Budget: 4,306,085.00 Total Budget: **Budget** 11,961,346.00 InDirect Budget: 16,267,431.00

David Weir (ISR-SRC) Principal

Investigator/Client

Funding Agency

HUM#: HUM00061128 Period Of Approval: 10/3/18-10/2/19 **IRB**

Evanthia Leissou **Project Team** Project Lead: Richard Warren Krause **Budget Analyst:**

Production Manager:

Production Manager: Andrea Sims Senior Project Advisor: Nicole G Kirgis Production Manager: Jennifer C Arrieta

no data Proposal #:

Description: The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992.

Rebecca Gatward

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 Data Col Period Security Plan

Milestone Dates

01/2019 - 08/2021 03/2020 - 03/2021

NA

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

Derek Dubugue (Production Manager), Sharon Parker (Production Management Coordination), Andrew Hupp (Project Team Members: Manager), Dan Tomlin (Project Manager), Gary Hein (Project Manager), Leah Roberts (Training Coordinator), Daniah

Buageila (Lead Project Assistant), Anna Fugua-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

Yes, R; Yes, INF Incentive

Administration

Check, prepaid (80.00); Check, post (\$50); Cash, post (20.00); Other (Money Order (by request)) Payment Type

Payment Method Check through STrak RPay System; Check through other system (Rpay system set up for MSMS); Interviewer r

Report Period Dec, 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.

Since the start of the holiday break, production slowed down, with interviewers working on average less than 20 hours per week. The overall response rate is 63% (goal 74%). The PI has agreed to attempt several strategies in an attempt to improve the response rate (including interviewer bonus, shift from field to web, respondent incentive increases).

The team continued to focus on technical development, systems testing, interviewer supplies, coding, and IRB submissions. The team has been preparing technical systems and materials, and securing resources for the SAQ mail protocol relaunch (scheduled for mid-January) and the launch of the SSA mal protocol (scheduled for end of January). DM13 planning with changes to the the cognition section and Covid module changes is being planned for release in January.

Measures noted in tables below are as of 1/15 (week 46)

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 Dec 31, 2020

 Total Cost to Date (Direct + Indirect):
 12,891,266.72

 Estimated Cost at Completion (E\$AC):
 15,646,799.34

 Total Budget:
 16,267,431.00

 Variance (Budget minus E\$AC):
 620,631.66

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.

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.

Projections Dec 31, 2020

Dollars Projected For Month:745,589.09Actual Dollars Used:704,647.69Variance (Projected minus Actual):40,900.40

Reason For Variance:Total hours were 4% under projections. Non-salary was 9% under projections for the month. Some of this variance was due to only particular to

projections for the month. Some of this variance was due to only partial recharges for December actually hitting in December (due to holidays). The difference has been pushed forward. We are working on revising SSA

Consent mailing projections.

Measures

	Units Complete	RR	HPI	
Current Goal:	15,620	67.5%	5.6	
Goal at Completion:	17,118*	74%	6.8	
Current actual:	15,275	66.4%	5.6	
Estimate at Complete:	17,118	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

PrincipalKristine Ajrouch (Life Course Development Program, SRC)Investigator/ClientToni Antonucchi (Life Course Development Program, SRC)

Laura Zahodne (Life Course Development Program, SRC)

Funding Agency

IRB HUM#: HUM00146040 Period Of Approval: 4/9/2020

Project TeamProject Lead:Juan Carlos DonosoBudget Analyst:Parina Kamdar

Production Manager:Theresa CameloSenior Project Advisor:Kirsten Haakan Alcser

Production Manager:lan OgdenProduction Manager:lan 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 Data Col Period Security Plan Milestone Dates 05/2019 - 08/2020 11/2019 - 07/2020

No

 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 Taghreid Lovell, Becky Scherr, Kallan Larsen, Dan Zahs, Pam Swanson, Dave Dybicki, Ashwin Dey, Brad Goodwin,

Team Members: John Gawlas, Paul Burton

Other Project Alzheimer's Disease Risk and Ethnic Factors: The Case of Arab Americans

Name of

Names:

Sample Mgmt Sys SurveyTrak

Data Col Tool Blaise 4.8

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

DE Software Other (Weblog possibly)
QC Recording Tool DRI-CARI; Camtasia
Incentive Yes, R; Yes, INF

Administration SRO Group

Payment Type Cash, prepaid (\$60, \$15)

Payment Method Interviewer payment of cash (reimbursed/reconciled via Tenrox)

Report Period Dec, 2020 (H&WB) Project Phase Planning

Risk Level Some Concerns

Monthly Update Project Paused/No activity

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 projected 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 Dec 31, 2020

 Total Cost to Date (Direct + Indirect):
 996,390.00

 Estimated Cost at Completion (E\$AC):
 2,345,099.00

 Total Budget:
 2,317,801.68

 Variance (Budget minus E\$AC):
 -57,297.00

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.

Dollars Projected For Month:5.00Actual Dollars Used:7.00Variance (Projected minus Actual):-2.00Reason For Variance:Project Paused/No activity

Measures

Projections

Dec 31, 2020

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

Project Name Housing & Children (HCDC, H&C)

Primary: Face to Face Total of Modes: 1 **Project Mode**

Project Status Current **Project Type** Sponsored Projects

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

Principal Sandra Newman (Johns Hopkins University)

Investigator/Client Tama Leventhal (Tufts University)

ним#:

Funding Agency

NICHD, HUD, RWJ Foundation, MacArthur Foundation

HUM00114794

IRB Period Of Approval: Barbara Lohr Ward **Project Team** Project Lead:

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

no data Proposal #:

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 Data Col Period Security Plan **Milestone Dates**

04/2016 - 02/2020 05/2017 - 09/2018

NA

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: 01/31/2021

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 Payment Method

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

Report Period

Dec, 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.
- Revised and updated project mail schedule.
- 0 Submitted new amendment to University of Michigan IRB related to telephone recruitment and data collection protocols, mail data collection of administrative records permission forms, storage of sensitive respondent documents, and further protocol updates to adjust for COVID.
- Drafted the following documents:
- English/Spanish Coverscreen End Game Letter
- English/Spanish Covid Concerns Letter
- English/Spanish Informant Locating Letter
- English/Spanish Newsletter
- English/Spanish Submission Checklist
- Spanish SSN Form Examples
- Modified submission documents to Johns Hopkins IRB standards in preparation for submittal to the PI's IRB.
- Prepared weekly production reports. Updated production reports template with requested figures.
- Finalized Missing Data callbacks
- Worked on specifications to logging program to incorporate logging for effort to correct SSN forms.

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.

Task 3: Questionnaire Development

% Task Spent to Date

Formatted the newsletter for printing.

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.
- Continued programming sample management system and reports for administrative records collection Weblog (logging application). Incorporated new reports. Began to incorporate changes required to track the effort to correct SSN forms.
- Began programming to implement the coverscreen incentive.
- Attended team meetings to plan systems update to accommodate SSA Reminder Calling

Tasks 6, 7: Interviewer Recruitment & Hiring, Training

% Task Spent to Date

No effort this month.

Task 8: Main Data Collection

% Task Spent to Date

- · Production interviewing is ongoing. As of January 1 (reflecting production through December 31st):
- o 1410 Coverscreens completed
- o 1304 PCG interviews completed
- □ 23 non-intact households
- Conducted final missing data callback interviews and contact attempts.
- 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 pre-notification letters where necessary.
- Requested gift card funds. Mailed tokens of appreciation for completed PCG interviews. Reconciled shipped gift cards and closed funds as necessary.
- Shipped second end-game letters and packages on December 3rd.
- Mailed concerns letters as requested by the field team.
- Conducted interviewer performance evaluations.
- Verification
- o Reviewed incoming verification forms to remove duplicates.
- Shipped and e-mailed final sample release
- SSN/Records-matching mailings
- o Ordered supplies (specialized envelopes) for mailings.
- o Kitted and shipped materials for records-matching reminder mailing (Cohort 1, Package #2).
- o Reviewed incoming social security forms to identify those in need of remediation. Mailed forms for correction along with notated checklist. Logged mailing for tracking.
- o Mailed tokens of appreciation for completed forms
- Holiday Card
- o Printed holiday cards
- o Mailed holiday cards and H&C magnets to all H&C sample

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

- · Reviewed final deliverable variables to identify respondent address and contact information for potential cleaning
- · Prepared and delivered geocodes
- Scanned and delivered accepted SSN forms.

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 production interviewing. 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 on financial status.
- 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.
- 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.
- 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:

- A data collection extension through the end of January, as well as reminder calling to incomplete SSA form recipients, have been approved. The current underrun and an additional \$200,000 in NICHD funding will finance this effort
- Remediation is required for incomplete Social Security record linkage forms. This will require additional labor and postage to mail forms back to the respondent, as well as an IRB submission for the checklist and correction guide documents to be included in the mailing.
- 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

Total Cost to Date (Direct + Indirect): 11,031,441.01 Jan 18, 2021 Estimated Cost at Completion (E\$AC): 11,900,464.46

Total Budget: 11,843,058.00 Variance (Budget minus E\$AC): -57,406.46

NICHD has authorized additional funding that will offset the overrun and Reason For Variance:

finance additional work.

Projections Jan 18, 2021

332,575.27 **Dollars Projected For Month:** Actual Dollars Used: 235,063.46 Variance (Projected minus Actual): 97,511.81

Reason For Variance: A new project grant related to the new funding was not issued in time,

causing ~\$85,000 in indirect costs and R&D to not be included in the December actuals. The remaining ~\$12000 variance is due to respondent

incentives not being expensed in December as expected.

Measures

	Units Complete	RR	HPI	
Current Goal:	1041 PCG iws	75% of located cases	8.5	
Goal at Completion:	1041 PCG iws	75% of located cases	8.5	
Current actual:	1304	73%	8.0	
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 David Weir (SRC)
Investigator/Client Jessica Faul (SRC)

Funding Agency

NIH

IRB HUM#:

HUM00061128 Period Of Approval: 8/20/20-8/19/21

Project TeamProject Lead:Evanthia LeissouBudget Analyst:Richard Warren KrauseProduction Manager:Lloyd Fate HemingwaySenior Project Advisor:Nicole G Kirgis

Production Manager: 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

Jennifer C Arrieta

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

•/ •

 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:** 03/13/2021

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 HRS Antibody, Antibody Project

Names:

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.

Administration

Yes, R SRO Group

Payment Type Check, prepaid (\$20)

Payment Method Check through STrak RPay System

Report Period Dec, 2020 (HRS 2020 ABT) Project Phase Implementing

Risk Level Some Concerns

Monthly Update

All test kits were mailed out by December 20, 2020 and all reminder postcards mailed by January 7, 2021. Overall response rate is at 28%, ranging from 49% to 13% depending on the length of time since Respondents received their

kits.

In an effort to improve response rates, the PI team requested we implement a reminder protocol. The request was made on December 21. Approximately 3,400 sample members who 1) have not responded to the antibody mailing, 2) have completed their HRS 2020 interview, 3) are either Black/Hispanic or White with a high school or lower education. These groups have lower than expected response rate to the initial phase of the project. Interviewers will call respondents to remind them of the antibody study, address any questions or concerns, offer to walk through the instructions over the phone, and/or ship the respondent a new kit if they have misplaced the original kit and are interested in participating. Each respondent will receive a maximum of three attempts if no contact is made and six attempts if contact is made. Interviewers will use a script and calls will be done in both English and Spanish. Target date to train interviewers is January 25. Using MSMS, a group of 25-30 staff from both SSL and Field will work on this effort.

MSMS data collector application and protocol rules were updated for: 1. Antibody consent logging after clarification from IRB on what fields must be completed to be considered a valid consent, and 2. Reminder postcard and result letter mailings due to difference between pretest and production in how the Minnesota lab delivered data.

We have experienced a delay in receiving test results from the Minnesota lab due to technical resource issues. Only 296 results (Negative and Non-Analyzable) were received in early December. Given the volume of calls and emails we are receiving from respondents asking for their test results, we requested from the PIs to intervene and find a solution.

Original sample selected=17,639 Sample removed from kit mailing = 1,352 Total Sample Sent A Kit = 16,287 Samples received by MN: 4,607 (28%) Refusals: 1,000 (6%)

Refusals: 1,000 (6%) Deceased: 71 (1%)

Pending response: 10,609 (65%)

Special Issues

A revised budget was 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.

Reminder calling work scope in late December added to be implemented in a short timeline.

MN lab doing additional analysis/quality checks on samples which are delaying results being sent to respondents.

Cost Dec 31, 2020

 Total Cost to Date (Direct + Indirect):
 664,680.25

 Estimated Cost at Completion (E\$AC):
 719,918.26

 Total Budget:
 817,809.00

 Variance (Budget minus E\$AC):
 97,890.74

Reason For Variance: The selected sample was 17,639 but the actual number of respondents sent

a kit was 16,287 based on updated data from HRS core data collection. In addition, voids were not included in the budget but have been projected in

CRS.

Projections Dec 31, 2020

Dollars Projected For Month:88,338.18Actual Dollars Used:76,842.11Variance (Projected minus Actual):11,496.07

Reason For Variance: The variance is primarily due to postage and general supplies. Minnesota

has only delivered results for 296 respondents so postage and supply costs

for results mailings are being pushed forward.

Measures

	Units Complete	RR	HPI	
Current Goal:				
Goal at Completion:	10,587	65%		
Current actual:	4,607	28%		
Estimate at Complete:	6,515	40%		
Variance:	0	25%		

Project Name HRS Neuroimaging Pilot (HRS-Neuro)

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

Project Status **Project Type** Sponsored Projects Deactivated

Budget Direct Budget: 169,363.00 InDirect Budget: 16,938.00 Total Budget: 186,301.00

Principal Professor Kenneth Langa, MD, Ph.D (UM SRC-HRS)

Investigator/Client 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: 04/2018-11/2021

Project Lead: Ian Ogden **Project Team**

> Budget Analyst: Richard Warren Krause Production Manager: Veronica Connors-Burge Senior Project Advisor: Evanthia Leissou

Production Manager: Production Manager:

no data Proposal #:

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. As of December, 2020, re-launch is not anticipated before fall,

2021 and the project will be deactivated until any re-launch planning resumes.

SRO Project Period

Data Col Period Security Plan **Milestone Dates** 01/2018 - 06/2022 03/2019 - 05/2022

NA

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: 05/31/2022

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)

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

Sample Mgmt Sys Survey Frak; Project specific system (Web Logging for Site Sample Management)

Data Col Tool

Laptop; Other (Optional Laptop for External Site Teams) Hardware

Other (Web Logging for Site Data-Entry); N/A **DE Software**

QC Recording Tool

NA

Yes, R; Yes, Other (Travel Expenses (processed and issued by imaging sites)) Incentive

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

Risk Level Some Concerns

Monthly Update

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

[General Status - Deactivation]

As of early-January, 2021 there has been no recent guidance nor speculation from SRC-HRS regarding details / likelihood of a pilot re-launch.

In December, 2020 we opted to push the anticipated re-launch back by an additional six-months, moving forward with project deactivation in the meantime. Projections for re-launch have been shifted (without revision) by six months, still reflecting a 9-month project period remaining (previously anticipated from April-December, 2021, now left on the books as taking place from September, 2021-May, 2022).

This is an administrative change - intended to keep the HRS Neuroimaging Pilot on SRO's books, while clearing SRO staff projections for the next six months.

[Pre-Deactivation Tasks - Status]

- (a) [Complete] Any pre-printed checks held by SRO and/or imaging site teams have been voided / stopped and been accounted for in pre-deactivation cost report. As before, until further notice, we have maintained an expected Respondent/Subjects cost of \$21,000 (105 participants receiving \$200 each).
- (b) [Complete] 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) 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 Dec 31, 2020

Total Cost to Date (Direct + Indirect): 193,900.80

Estimated Cost at Completion (E\$AC): 226,297.90

Total Budget: 186,301.00

Variance (Budget minus E\$AC): -39,996.90

Reason For Variance: EAC has remained stable

EAC has remained stable for the last several months, and all known activities prior to re-launch have concluded. This project will be moved into "Deactivated" status as of this month (01/2021). Re-launch is not anticipated before fall, 2021.

[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 Dec 31, 2020

Dollars Projected For Month:-228.80Actual Dollars Used:-1,988.80Variance (Projected minus Actual):1,760.00

Reason For Variance:

Projections for December were effectively zero. Actual costs for the month were negative due to the processing of a final batch of voided checks. As usual, projected Respondent/Subjects costs maintained at \$21,000.

Measures

Units Complete	RR	HPI	
105	50.0%	1.0	
[pending]	[pending]	[pending]	
32	19.2%	1.62	
[pending]	[pending]	[pending]	
[pending]	[pending]	[pending]	
	105 [pending] 32 [pending]	105 50.0% [pending] [pending] 32 19.2% [pending] [pending]	105 50.0% 1.0 [pending] [pending] [pending] 32 19.2% 1.62 [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 Sonalde Desai (University of Maryland)
Investigator/Client Stephanie Chardoul (University of Michigan)

Santanu Pramanik (National Council of Applied Economic Research)
National Institutes of Health, Department of Health and Human Services

Funding Agency National Institutes of Health, Department of Health and Human Ser 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 Data Col Period Security Plan Milestone Dates 01/2019 - 05/2022 06/2020 - 05/2022

NA

PreProduction Start:
Pretest End:

Staffing Completed:
SS Train Start:
DC Start:

Pretest Start:
Recruitment Start:
SGIT Start:
SS Train End:
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 QC Recording Tool

Other (TBD) DRI-CARI

Incentive Yes, Other (TBD)

Administration Other (TBD)

Payment Type Other (TBD)

Payment Method Other (TBD)

Report Period

Dec, 2020 (IHDS3)

Project Phase

Implementing

Risk Level

On Track

Monthly Update

December was used to train and help the client with using translation tools for each of the instruments, finish the implementation of the automatic preload going from the House Hold project to the Migrant project and prepare testing materials for the client. The project is now temporarily in freeze mode due to the pandemic and TSG will continue to support the NCAER team with any issues that halt the testing process to encourage them to continue testing and signing off on all instruments and ST projects.

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
- o 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

Jan 31, 2021

 Total Cost to Date (Direct + Indirect):
 486,925.08

 Estimated Cost at Completion (E\$AC):
 505,305.58

 Total Budget:
 531,902.53

 Variance (Budget minus E\$AC):
 252,578.95

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

Jan 31, 2021

Dollars Projected For Month: Actual Dollars Used: 10,579.97 5,504.71 5,075.26

Variance (Projected minus Actual): Reason For Variance:

Implementation phase got extended. Froze the House Hold project at the

end of November.

Measures

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

Project Name Malaysia Ageing and Retirement Study Wave 2 (MARS 2)

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

Project Type Sponsored Projects Project Status Current

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

Principal

IRB

David Weir (UM SRC - HRS)

Investigator/Client

Funding Agency Health and Retirement Study

> ним#: NA Period Of Approval:

Project Team Project Lead: Budget Analyst:

Margaret Lee Hudson Richard Warren Krause

Kasyera Kowalczyk

Production Manager:

Senior Project Advisor: Evanthia Leissou

Production Manager:

Production Manager:

no data Proposal #:

The Social Wellbeing Research Centre (SWRC) at the University of Malaya is conducting the second wave of data Description:

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 Data Col Period Security Plan

01/2020 - 05/2021 09/2020 - 04/2021

NA **Milestone Dates**

PreProduction Start: Pretest Start: Recruitment Start: Pretest End: Staffing Completed: GIT Start:

SS Train Start: SS Train End: DC Start: DC End:

Other Project

Technical Lead Jay Lin Gina Cheung Technical Advisor **Team Members:**

Peter Sparks Blaise Programmer Holly Ackerman WebTrak Programmer John Gawlas HelpDesk Specialist

Genise Pattulo HelpDesk Supervisor Cheng Zhou Database Administrator LihShwu Ke **Database Administrator**

SurveyTrak Intl Programmer Marsha Skoman

SurveyTrak Offline Ashwin Dey Brad Goodwin Data Manager

HelpDesk Specialist (back up) Emmanuel Ellis

Other Project

Names:

Sample Mgmt Sys Other (ST International)

Blaise 4.8 **Data Col Tool** 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 Dec, 2020 (MARS 2) **Project Phase** Implementing

Risk Level

On Track

Monthly Update

Data collection continues. A planned 2nd IWR training has been postponed — first delayed to later in Dec and then postponed — until 2021 due to movement control orders in Malaysia that prevent IWRs traveling for training. The client requested the addition of 5 new survey questions to meet their stakeholder needs; we were able to get programming resources to add these questions. Programming of the Chinese language translation was completed and released ahead of the next IWR training. The SRO data manager continues to work with the SWRC team to train them on basic data management processes in an effort to build capacity in our client's team as well as prepare for the SRO data manager's time (on day-to-day management) to be spent elsewhere as new projects begin.

Special Issues

None

Cost

Jan 12, 2021

Total Cost to Date (Direct + Indirect): 166,775.46

Estimated Cost at Completion (E\$AC): 226,706.36

Total Budget: 254,702.00

Variance (Budget minus E\$AC): 27,995.64

Reason For Variance: No international travel

Projections

Jan 12, 2021

Dollars Projected For Month:9,708.09Actual Dollars Used:10,569.82Variance (Projected minus Actual):-861.73

Reason For Variance:

Some unplanned programmer hours to add 5 questions to the survey (per client request); additional project management hours to assist with

requested changes by client

Measures

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

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 Paul Courant (Gerald R Ford School of Public Policy)
Investigator/Client Kevin Stange (Gerald R Ford School of Public Policy)

Susan Jekielek (ICPSR)

Funding Agency

IRB

HUM#: 00173324 Period Of Approval: 10/2020-10/2021

Project TeamProject Lead:Maureen Joan O'BrienBudget Analyst:Carl S RemmertProduction Manager:Lisa J Carn

Senior Project Advisor:Nicole G KirgisProduction Manager:James Koopman

Production Manager:

Proposal #: no data

Description: TBD

SRO Project Period Data Col Period Security Plan Milestone Dates 10/2020 - 10/2021 01/2021 - 06/2021

NA

PreProduction Start: 10/15/2020 Pretest Start:

Pretest End: Recruitment Start: 11/15/2020

Staffing Completed: 12/15/2020 GIT Start:

SS Train Start: 02/18/2021 **SS Train End:** 02/18/2021

DC Start: DC End:

Other Project

Peter Batra - Programmer and technical lead, former MCBII Pilot Lead, Laura Yoder - Data Ops, Dave Dybicki -

Team Members: 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 Dec, 2020 (CBII) Project Phase Initiation

Risk Level On Track

Monthly Update The project grant was created, 11/15/20. Regarding budget, recently a 2nd BA has joined the team to assist the

original BA. The project is currently showing an overrun, but we are working through projections for individual staff and budget values assigned and expect there not to be an overrun once this is done. There are still some unnamed values, which may not be named by additional staff, including some programming and sampling hours. Pre-production is well underway. Systems are almost completely developed (Blaise SMS, Illume) using pilot projects as the foundation. The questionnaire programming is done and has been signed off on by Pl's. We have given the a sample of data output and are awaiting signoff on that as well. Since we received a final sample file behind schedule, this has caused a slight delay in production start. We expected emails and letters to go outoo 'mid-January', will likely go out end of the week 1/18 or early week of 1/25. Sampling has been completed and sample files are ready to load to Illume and for the mailing file. Reminder calling training will be held on 2/2/21. Manual locating training will be held on 2/18. The reminder calling and manual locating staff will be made up of a combination of SSL, Field, and PDMG

SSA's. Non-SSL Iwers will receive an SSL orientation, and all Iwers will receive Technical Training which includes

instruction for using Zoom. We are working through creating materials for trainings, as well as creating the Canvas training website for CBII.

Special Issues

Cost

Jan 31, 2021

Total Cost to Date (Direct + Indirect): 22,118.49

Estimated Cost at Completion (E\$AC): 661,760.24

Total Budget:643,762.00Variance (Budget minus E\$AC):-17,998.24

Reason For Variance: In process of working through projections with Budget Analyst and 2nd BA

who is assisting.

Projections Jan 31, 2021

Dollars Projected For Month:22,111.84Actual Dollars Used:0.00Variance (Projected minus Actual):0.00

Reason For Variance: In process of working through projections with Budget Analyst and 2nd BA

who is assisting.

Measures

	Units Complete	RR	HPI
Current Goal: Goal at Completion: Current actual: Estimate at Complete: Variance:	3000	20%	

Project Name Monitoring the Future - Base Year 2017-2022 (MTF base year 2017-2022)

Primary: Class SAQ **Project Mode** 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

HUM#: 00131235 Period Of Approval: 4/18/2019 - 4/17/20 **IRB**

Rebecca Gatward **Project Team** Project Lead: Budget Analyst: Mary Johnson Production Manager: Margaret Lavanger

Production Manager:

Senior Project Advisor: Gregg Peterson 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 Data Col Period

04/2017 - 04/2022 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:

Other Project

Names:

Sample Mgmt Sys

DRAFT - Hueichun Peng, Minako, David B, Debra Heier

SurveyTrak; Project specific system (SurveyCTO) Other (SurveyCTO) **Data Col Tool**

Tablet Hardware **DE Software** N/A **QC Recording Tool**

Incentive Yes, Other (Honorarium paid to school by MT project staff)

Administration ISR Group (MTF project team)

Payment Type

Payment Method Check through other system

Report Period Dec, 2020 (MTF base year 2017-2022) **Project Phase** Planning

On Track Risk Level

Monthly Update December updates

- Survey Admins were completed at eight pilot schools and a debrief was held.

- The pilot was successful - we gathered relevant information about how schools are operating, tested our technical

systems and gathered feedback from students. The two Field Researchers found their experience conducting the survey in with each of the eight schools varied - this in something that the Field Researchers working on this MTF wave will find very different than previous waves.

- Approximately 320 schools have been recruited for the Base Year (out of around 400) data collection will begin in February 2021.
- The team focused on updating technical systems, production planning and creating training materials.

Special Issues

Cost Jan 08, 2021

 Total Cost to Date (Direct + Indirect):
 5,101,835.29

 Estimated Cost at Completion (E\$AC):
 7,189,286.97

 Total Budget:
 7,316,931.00

 Variance (Budget minus E\$AC):
 25,808.74

Reason For Variance:

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 projections are still included for some FTF admins beginning in May 2021. It is unlikely that these admins will take place in-person.

The wave 4 projections include staff hours required to undertake the development work to implement the web mode (limited to a basic sample management system, portal and field procedures) and a small pilot. The total cost is estimated to be \$81,131.71 (August - December 2020) This work was not included in the original scope of work for 2017-2022.

The salary and non-salary cost projections for wave 4 (2021) have been revised based on the assumption that the majority of the school administrations will be conducted in web mode (remote or in-school). The hours required for Field Researchers to conduct the remote admins and the number of remote and in person admins are estimated. We have compared these estimates with actual interviewer hours used during the pilot, the estimates seem to be at an appropriate level. We will review actual interviewer hours during production to ensure that projected hours are at the appropriate level.

The projected costs for 2021 have been updated to include Illume charges for completed surveys (\$.95 per submitted survey).

The notes sent with the December Client cost report will be uploaded (in MPR).

Projections Jan 08, 2021 Dollars Projected For Month:43,615.03Actual Dollars Used:40,785.25Variance (Projected minus Actual):2,829.78

The source of the variance is due to lower salary and non-salary costs than projected in December. These hours and costs were mainly related to printing and mailing training materials - ths work was all completed in early

January rather than late December.

Measures

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

Project Name Monitoring the Future Panel (web) 2020 (MTF Panel (main data collection) 2020)

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

Project Type Sponsored Projects Project Status Current

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

Principal

Investigator/Client

John Schulenberg (UM-SRC)

Funding Agency

IRB

HUM#: HUM-0013R02 Period Of Approval: In continuing Review

Donnalee Ann Grey-Farquharson **Project Team** Project Lead:

> Budget Analyst: Mary Johnson

Production Manager:

Gregg Peterson Senior Project Advisor: Production Manager: Rebecca Gatward

Production Manager:

no data Proposal #:

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 Data Col Period Security Plan

Milestone Dates

01/2020 - 12/2020 04/2020 - 10/2020

NA

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

Sample Mgmt Sys

MTF Illume Web 2020

Names:

Incentive

SMS; Web SMS; Project specific system (RLM, RIMS)

Data Col Tool Illume Hardware NA **DE Software** NA

QC Recording Tool NA

Yes, Other (Managed by SRC Study Staff)

Administration NA **Payment Type** N/A **Payment Method** N/A

Report Period Dec, 2020 (MTF Panel (main data colle **Project Phase** Closing

Risk Level On Track **Monthly Update**

2020 Project had ended. Once funds are transferred to the PG 2020 MPR Project will be closed.

Special Issues

Cost

Dec 31, 2020

 Total Cost to Date (Direct + Indirect):
 845,614.61

 Estimated Cost at Completion (E\$AC):
 1,216,828.96

 Total Budget:
 1,031,133.00

 Variance (Budget minus E\$AC):
 -185,695.96

Reason For Variance: The cost includes some projections for MTF Panel 2021 which runs from

01/2021 - 12/2021. However, the funds for Panel 2021 (\$355,783 Total) have not yet been transferred to the PG so although it looks like we have an

overrun we actually have an underrun.

In addition - a huge part of the underrun is based on cumulative carry forwards from 2016 - 2020. Mary is in conversation with Nick P. to see if MTF wants to just deduct that underrun and transfer only the balance to the

PG (preferred) or have SRO retain and continue with the underrun.

Projections Dec 31, 2020

Dollars Projected For Month:31,555.65Actual Dollars Used:17,786.75Variance (Projected minus Actual):-13,768.90

Reason For Variance: Under-run is based on less hours worked in December than projected.

Measures

Units Complete RR HPI

Current Goal:
Goal at Completion:
Current actual:
Estimate at Complete:
Variance:

Project Name

MTF High Intensity Drinking (MTF HID)

Project Mode

Primary: Web

Total of Modes: 1

Project Type

Sponsored Projects

Project Status Current

Budget

Direct Budget:

301,160.00

InDirect Budget: 167,822.00 Total Budget:

468,982.00

Principal

Investigator/Client

Megan Patrick (Univ of Minnesota)

Funding Agency

IRB

HUM#:

00159183

Period Of Approval:

Project Team

Project Lead: Budget Analyst: Peter Rakesh Batra Parina Kamdar

Production Manager:

Senior Project Advisor:

Kirsten Haakan Alcser

Production Manager: Production Manager:

Proposal #:

no data

Description:

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

SRO Project Period Data Col Period Security Plan

Milestone Dates

03/2019 - 07/2020 05/2019 - 07/2019

NA

PreProduction Start:

Hueichun Peng

Pretest End:

SS Train Start:

DC Start:

Staffing Completed:

Recruitment Start: GIT Start: SS Train End:

Pretest Start:

DC End:

Other Project Team Members:

Other Project

Sample Mgmt Sys

Names:

Incentive

Data Col Tool Hardware **DE Software QC Recording Tool** Web SMS Illume NA NA NA Yes. R

Administration

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

Payment Method

Check through other system (handled by Study Staff)

Report Period

Dec, 2020 (MTF HID)

Project Phase

Implementing

Risk Level

On Track

Monthly Update

In December we conducted a full integrated test with many scenarios and including baseline + 14 daily surveys started and completed in real time. The MTF project team discovered a few survey changes that needed to be made, but overall the logic and calculations (respondent payment based on numbers of surveys completed) all are working correctly. We'll be conducting one more test in January and are prepared for an on-time launch of data collection in mid-February.

Special Issues

Cost

Total Cost to Date (Direct + Indirect): 182,066.32 Jan 08, 2021 Estimated Cost at Completion (E\$AC): 337,746.83

Total Budget: 468,982.00 Variance (Budget minus E\$AC): 131,235.17

Reason For Variance: Mainly our scope has been significantly reduced as the project team is

handling much of the day-to-day respondent activity. This amount has been

fairly constant since the beginning of the project.

Projections Jan 08, 2021

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

Reason For Variance:

Measures

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

Project Name MTF Vaping Project (MTF Vaping Project)

Primary: Web **Project Mode**

Project Type Sponsored Projects Project Status Current

Direct Budget: **Budget** 111,862.00 InDirect Budget: 62,642.00 Total Budget: 174,504.00

Principal

Investigator/Client

Funding Agency

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

Peter Rakesh Batra **Project Team** Project Lead:

> Budget Analyst: Production Manager:

Senior Project Advisor: Kirsten Haakan Alcser

Production Manager: Production Manager:

no data Proposal #:

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 Data Col Period

05/2020 - 11/2020 08/2020 - 10/2020

Hueichun Peng

Security Plan NA

Milestone Dates

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

Other Project Team Members:

Other Project

Names:

Web SMS Sample Mgmt Sys **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

Dec, 2020 (MTF Vaping Project) Report Period

Project Phase Implementing

Risk Level On Track

Monthly Update The final tasks were completed in December as Data was delivered as scheduled to the MTF team in Stata and SAS

format.

The formal SRO close-out for the MTF Vaping Project will be presented at an SRO Project Review meeting in January to formally share with SRO the successful 2nd implementation of how a comprehensive Web SMS system works with the automated administration of a baseline survey and 14 subsequent daily surveys.

Special Issues

Cost Jan 08, 2021

 Total Cost to Date (Direct + Indirect):
 109,908.61

 Estimated Cost at Completion (E\$AC):
 114,458.11

 Total Budget:
 174,504.00

 Variance (Budget minus E\$AC):
 64,595.39

Reason For Variance:

We have been able to re-use much of the programming and systems in

place for the MTF HID project.

Projections Jan 08, 2021

Dollars Projected For Month:0.00Actual Dollars Used:0.00Variance (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:				

Project Name National Campus Climate Survey (NCCS 2021)

Primary: Telephone **Project Mode**

Project Status **Project Type** Sponsored Projects Current

InDirect Budget: **Budget** Direct Budget: 4,679.00 1,357.00 Total Budget: 6,036.00

Principal

William Axinn (University of Michigan)

Funding Agency

Investigator/Client

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

Sharon K Parker **Project Team** Project Lead:

> Budget Analyst: Production Manager: Senior Project Advisor: Production Manager: Production Manager:

no data Proposal #:

Description: SRO will conduct telephone follow up support activities for the National Campus Climate Survey (NCCS) for NYU.

> in addition to sample design and selection services, SRO will provide up to 100 hours of interviewer support to contact non-respondents to the NCCS web survey, encouraging sample members to complete the web survey.

SRO Project Period Data Col Period

01/2021 - 01/2021 01/2021 - 01/2021

Security Plan NA

Milestone Dates

PreProduction Start: 12/08/2020 Pretest Start:

> Pretest End: Recruitment Start: 12/08/2020

Staffing Completed: 12/20/2020 GIT Start:

SS Train Start: 01/13/2021 SS Train End: 01/13/2021

DC Start: 01/13/2021 DC Fnd

Other Project **Team Members:** Other Project

Names:

Sample Mgmt Sys

Project specific system (SoundRocket SMS); Other (Workzone/Exel)

Other (SoundRocket SMS) **Data Col Tool** Hardware Laptop; [UM cell] Phone

DE Software NA **QC Recording Tool**

NA

Not used Incentive Administration N/A **Payment Type** N/A **Payment Method** N/A

Dec, 2020 (NCCS 2021) Report Period **Project Phase** Implementing

Risk Level On Track

We do not have shortcodes and costs are being charged to DCO OH as a placeholder. As of 1/20/2021 three **Monthly Update**

interviewers have completed 65% of the calling in approximately 36 interviewer hours (including training hours.)

Using SoundRocket SMS without access to reports. The production manager is managing the data collection via **Special Issues**

interviewer reports on excel and email. Interviewers are managing their sample on paper and in excel.

Cost

3.700.00 Total Cost to Date (Direct + Indirect): Jan 31, 2021

6.036.00 Estimated Cost at Completion (E\$AC): 6.036.00 Total Budget: Variance (Budget minus E\$AC): Reason For Variance: See Monthly Updates

Projections Jan 31, 2021

Dollars Projected For Month:6,036.00Actual Dollars Used:0.00Variance (Projected minus Actual):0.00Reason For Variance:See Monthly Updates

Measures

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

Project Name National Survey of Family Growth (NSFG 2010-2020)

Primary: Face to Face Total of Modes: 1 **Project Mode**

Project Status Current **Project Type** Sponsored Projects

Budget Direct Budget: 32,653,126.47 InDirect Budget: 8,448,262.00 Total Budget: 41,101,388.47

Principal Joyce Abma (NCHS) Investigator/Client Mick Couper (ISR)

Funding Agency

NCHS, CDC, NICHD

IRB ним#:

0002716 Period Of Approval: 7/17/13 - 7/17/17

Maureen Joan O'Brien **Project Team** Project Lead: Budget Analyst: Nancy E Oeffner Production Manager: Theresa Camelo Senior Project Advisor: Nicole G Kirgis

Production Manager:

Production Manager: Rebecca Loomis

no data Proposal #:

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 Data Col Period Security Plan **Milestone Dates**

09/2010 - 07/2020 09/2011 - 06/2019

Yes

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 **Data Col Tool**

SurveyTrak Blaise 4.8

Hardware NA

Tablet; [UM cell] Phone; Paper and Pencil

DE Software 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)

Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office **Payment Method**

Dec, 2020 (NSFG 2010-2020) **Project Phase** Closing Report Period

On Track Risk Level

The Post-Production project for NSFG Cycle 8 ended December, 2020. Data collection ended September 11, 2019. **Monthly Update**

The contract end date was 12/30/2020. Closeout efforts which were finalized include, 1. PUF4 has been delivered, including the remaining contextual file. 2. The PII file was delivered on 11/12. 3. Additional electronic materials and Blaise code specified in the contract schedule of deliverables was delivered. 4. Files to be saved from FSEC for archiving purposes were identified by FSEC users and reviewed for PII, and were moved from FSEC. They are currently being held in a 'life boat' outside FSEC. 5. C6-C8 Surveytrak tables with PII and survey data removed were transferred through FSEC. 6. FSEC was dismantled. 7. The final DAA report and copies of individual agents' signed forms were provided to NCHS. Some remaining tasks include, 1. The SRC PI needs to sign certification of

destruction by 1/30/21. This will occur as soon as SRC and NCHS have come to a common agreement regarding a request for SRC PI's to retain a couple of files to use in the writing and publishing of an article, then be destroyed. 2. Files in the lifeboat will be returned to individual users for storage. Regarding the NSFG closeout budget, we ended with an underrun of \$16,743.45. The shortcodes have been disabled and can no longer be charged. Updates on total budget:

Total C8-10 Budget: \$45,682,579 Actuals+Projections: \$45,659,504

Variance: \$23,075

December 2020 Actuals: \$56,058.33 Projections: \$63,538.75 Variance: (\$7,480.42) Total Post-Production: Budget: \$902,000

Projected CAC: \$885,256.55 Variance: \$16,743.45

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 Jan 31, 2021

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 Jan 31, 2021

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	
1550	68%	10.0	
5500	79%	10.0	
1509	64%	11.9	
4	61.8%	10.3	
28	18.2%	.3	
	1550 5500 1509 4	1550 68% 5500 79% 1509 64% 4 61.8%	1550 68% 10.0 5500 79% 10.0 1509 64% 11.9 4 61.8% 10.3

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 Panel Study of Income Dynamics 2021 (PSID21)

Project Mode Primary: Telephone Secondary: Web Total of Modes: 2

Project Type Sponsored Projects Project Status Current

Budget Direct Budget: 4,386,008.00 InDirect Budget: 2,456,167.00 Total Budget: 6,842,175.00

Principal David Johnson (UM)
Investigator/Client Katherine McGonagle (UM)

Narayan Sastry (UM)

Funding Agency

IRB

NSF, NIA, NICHD, The Office of the Assistant Secretary for Planning and Evaluation of the United States, DHHS, The Econom

HUM#: HUM00062417 **Period Of Approval:** 8/20/2020 - 8/19/202

Project TeamProject Lead:Shonda R Kruger-NdiayeBudget Analyst:Megan Gomez-MesquitaProduction Manager:Stacy Quisenberry

Production Manager:Stacy QuisenberrySenior Project Advisor:Stephanie A ChardoulProduction Manager:Sarah Crane

Production Manager: Rachel Anne Orlowski

Proposal #: no data

Description: PSID (known to Respondents as the Family Economics Study or FES) is a longitudinal survey of several thousand

individuals and their families, carried out since 1968 and conducted every two years. The sample is comprised of respondents from the 4,800 original families as well as new (immigrant) sample added in 1997/1999 and 2017/2019. The total 2021 sample size will be approx. 11,200, with approx. 9,700 completed interviews expected. Most of the information collected is about family composition and changes (marriages, divorces, births, deaths, people moving in and out), income sources and amounts, employment and pensions and wealth. There are also questions about housing, education, vehicles, health, and money spent on food, healthcare, and school. The main

focus is on how these family composition and financial factors interact with each other and how they change over time. The 2021 instrument also features questions related to the impact of COVID on the family.

PSID 2021 is the first full wave of PSID Core to be conducted with a Web, self-administered option and using Blaise 5 and MSMS and the work scope includes the re-write of the 68-ID website and the Splitoff program to be compatible with new technical systems.

TAS21 will follow PSID Core data collection, interviewing eligible PSID sample members on a flow basis following their Core interviews.

Note: The Budget listed in MPR is the original 2021 budget. It has not been approved by PIs, who are currently reviewing a rebudget.

SRO Project Period Data Col Period Security Plan Milestone Dates 04/2020 - 04/2022 03/2001 - 10/2021

NA

 PreProduction Start:
 04/01/2020
 Pretest Start:
 09/28/2020

 Pretest End:
 10/25/2020
 Recruitment Start:
 10/15/2020

Staffing Completed: 12/02/2020 GIT Start:

SS Train Start: 02/19/2021 SS Train End: 02/26/2021 DC Start: 03/01/2021 DC End: 12/31/2021

Other Project Team Members:

Other Project Family Economics Study 2021, PSID Core 2021

Names:

Sample Mgmt Sys MSMS Data Col Tool Blaise 5

Hardware Laptop; [UM cell] Phone

DE Software N/A
QC Recording Tool Camtasia

Incentive Yes, R; Yes, Other (Proxy, Locator)

Administration ISR Group (PSID)
Payment Type Check, post (Varies)

Payment Method Check through other system (PSID-RAPS); Other (Electronic RPay)

Dec, 2020 (PSID21) Planning Report Period **Project Phase**

Risk Level

Some Concerns

Monthly Update

The PSID PIs approved the SRO rebudget on 12/22. The rebudget modified MDC iwer hours to 67,984 (an HPI of 7.79 for CATI iws and 6.5 for Web iws requiring NR calling).

December work focused heavily on technical systems development and training planning.

Work on Concurrent Offline continued. It was found that data from CATI sessions sometimes lingered in MSMS although the Web session had been adjudicated winning. Refinement of the Blaise instrument programming proceeded apace. Work on development of other necessary programs (e.g. the Splitoff program, the 68-ID site, the Self Scheduler) continued, but at a slower pace than hoped. Ongoing troubleshooting of Concurrent tapped resources that would otherwise have moved on to the next priority. Although the project team has been reprioritizing for months, in early January, a review was completed and TSG was provided with very explicit prioritization for each outstanding request that requires MSMS development.

The project training team continued with plans to develop home study, asynchronous, and synchronous training content featuring videos, written material, exercises, etc.

The Some Concerns designation for this report reflects concerns about the amount of development work related to MSMS and related technical systems that still remains.

Special Issues

Cost

Total Cost to Date (Direct + Indirect): 612,572.66 Dec 31, 2020 Estimated Cost at Completion (E\$AC): 6,899,683.40 Total Budget: 6,842,175.00 Variance (Budget minus E\$AC): 17,384.60

> Reason For Variance: Trivial variance of only .25% of total budget.

Projections Dec 31, 2020

Dollars Projected For Month: 127,528.47 Actual Dollars Used: 82,930.79 Variance (Projected minus Actual): 44,597.68

Reason For Variance: There were underruns in salary across all sub-units but the biggest variance

was in TSG.

Measures

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

Project Name PSID Child Development Supplement V (2019) (CDS-19)

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

Project Status **Project Type** Sponsored Projects Current

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

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

Funding Agency

NICHD, Robert Wood Johnson Foundation

ним#: **IRB**

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

Project Team Project Lead: Budget Analyst:

Rachel Anne Orlowski

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 Data Col Period Security Plan Milestone Dates

09/2018 - 02/2021 09/2019 - 12/2020

NA

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: 12/31/2020

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

ISR Group (PSID) Administration Check, post; Cash, post **Payment Type**

Payment Method Check through other system (PSID-RAPS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (PS

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

Risk Level Some Concerns

Consolidated 8 IWERs on 12/1. All IWERs were sent a debriefing survey. **Monthly Update**

Follow Up Calling Effort began on 12/7 - 3 IWERs trained and certified for production.

Re-sent self-scheduler email invitations to all qualified outstanding cases on 12/10 and 12/22.

COVID IWing End Game Bonus period:12/18-12/31 (13 days, excluding 12/25). Completed 98 IWs during End Game

period.

Ending COVID IW'ing on 12/31 with 1164 total IWs - 69% Restart RR and 4.9 HPI.

Transferred more FTF interviewer supplies and respondent materials to Thompson on 12/22.

One COVID iwer QC investigation.

Noticeable delay in receiving respondent materials via mail.

As of 11/24 Data pull, 46% saliva consent received are invalid/missing (89% missing--PCG, Child, OA; 11% invalid--Child, OA) --PIs asked SRO to explore electronic consent administration.

IVR Data delivered on 12/18. Working with PIs to prepare data deliverables.

Special Issues

COVID IWER QC investigation

Projecting overrun - PIs kept informed.

Cost Jan 31, 2021

 Total Cost to Date (Direct + Indirect):
 8,729,570.31

 Estimated Cost at Completion (E\$AC):
 9,075,443.57

 Total Budget:
 8,965,959.00

Variance (Budget minus E\$AC): -109,484.57

Reason For Variance: Our direct cost overrun projection is within \$200 of where we were last

month, at \$70K direct cost.

Projections Jan 31, 2021

Dollars Projected For Month:250,548.47Actual Dollars Used:236,189.29Variance (Projected minus Actual):14,359.18

Reason For Variance: Mainly due to Postage/Freight underruns, and December recharge

underruns (which will catch up in January).

Measures

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

Project Name Qatar World Mental Health Survey (WMH-Qatar)

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

Project Type Sponsored Projects Project Status Current

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

Principal Zeina Mneimneh (University of Michigan) Investigator/Client Salma Mawfek Khaled (Qatar University)

Funding Agency

IRB

Cambridgeshire and Peterborough NHS Foundation Trust

ним#: Period Of Approval:

Sarah Elisa Broumand **Project Team** Project Lead: 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 Data Col Period Security Plan **Milestone Dates**

04/2019 - 10/2021 01/2020 - 10/2021

NA

Pretest Start: PreProduction Start: Pretest End: Recruitment Start: Staffing Completed: GIT Start: SS Train End: SS Train Start: 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)

Blaise 5

Data Col Tool Hardware

Laptop; Tablet

DE Software QC Recording Tool N/A

Incentive

N/A

Yes, Other (TBD) Administration Other (Qatar University)

Payment Type Other (TBD) **Payment Method** Other (TBD)

Report Period

Dec, 2020 (WMH-Qatar)

Project Phase

Implementing

Risk Level

On Track

Monthly Update

SESRI has been working on updating the system monitoring as a result of conducting the Pilot CATI interviewer. The pilot data collection started the week of October 18th. The team met with SESRI in December to review some requests to modify the indicators due to changes implemented. SESRI is now implementing a short and a long version of the isntrument and some of the indicators need to be modified accordingly. The team also discussed The tam also discussed data requirements from SESRI to implement a new indicator (cooperation rates).

Special Issues

None

Cost

Dec 31, 2020 | Total Cost to Date (Direct + Indirect): 57,610.82 | Estimated Cost at Completion (E\$AC): 64,672.47

 Total Budget:
 74,928.00

 Variance (Budget minus E\$AC):
 10,255.53

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 Dec 31, 2020

Dollars Projected For Month:2,024.16Actual Dollars Used:756.89Variance (Projected minus Actual):1,272.90

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:				

Project Name Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study (STARRS-LS Waves 3 &

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 James Wagner (University of Michigan)

Investigator/Client Robert Ursano (Uniformed Services University of the Health Scienc)

Murray Stein (University of California San Diego)

Funding Agency

Department of Defense

IRB HUM#:

IUM#: HUM00180765 Period Of Approval: 6/3/2020 - 6/2/2021

Project TeamProject Lead:
Budget Analyst:Meredith A HouseProduction Manager:Ruth B PhilippouSenior Project Advisor:Lisa S HollandProduction 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 Data Col Period Security Plan Milestone Dates 05/2020 - 04/2025 11/2020 - 10/2024

Yes

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

STARRS-LS Continuation

Names:

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	Dec, 2020 (STARRS-LS Waves 3 & 4) Project Phase Initiation
Risk Level	On Track
Monthly Update	 We have released two replicates (1,624 sample lines) and completed 760 interviews as of January 7. We continued bi-weekly meetings with the ODUSA to coordinate Safety Plan and respondent locating activities. James and Meredith attended the GSC Meeting on December 8. We sent our Year 2 budget to USUHS on December 15. We received a request from Dr. Kessler for a ballpark budget for a study of U.S. Army Soldiers in Germany (STARRS-affiliated study, not part of STARRS scope or funding). We submitted a budget for a pilot study in which U-M will attempt to interview 300 non-response cases from the original STARRS-LS sample. We received word on December 9 that the GSC decided not to require a pilot study. We filled in U-M's cost and FTE data on the SOW and sent it to USUHS on December 18. IRB: A STARRS-LS Continuation amendment, describing changes to the instrument and a change to the estimate for participation from 45 to 60 minutes, was submitted December 15. The HADS amendment to add new dataset to IRB-approved list was approved by USUHS on December 17. We carried out a quarterly review of Enclave and Great Lakes Cluster users to confirm analysts who should retain access. Materials and instructions for the Annual Security Training Renewal were sent to U-M STARRS Data Enclave users for completion by February 1. The U-M Enclave team completed follow-up tasks from the November 30 Security Controls Review meeting with ODUSA/AAG. We awaited the final report/approval from AAG. The STARRS LSW2 public use survey data (same as provided to ICPSR) was loaded to the SQL relational database in the U-M STARRS Data Enclave. We continued work on biomarker group requests for assistance. During the month, we continued work on two existing requests. 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

Page 73 of 78 Special Issues We continue to track areas of risk and develop mitigation strategies. Wave 3 Challenges Wave 3 consent review and approval process - these risks were described in a September 30, 2020 memo to the ODUSA. The DHA Privacy Board has approved the DSA modification for the MHS HIPAA form; however, we will not П 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. In implementing a cumbersome consent battery, our survey response rates may go down for both web and phone interviews. However, very early Wave 3 results indicate this is not the case. HIPAA authorization cannot be provided verbally during CATI interviews. We have established detailed procedures for telephone interviews. It is still too early to tell how successful gaining the HIPAA consents for CATI respondents will be. **Enclave Support** 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 There are a few cost estimates for new scope that have yet to be made (Table 2 above). As decisions are made, 0 we will work with the research team to schedule and implement this work. 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 Total Cost to Date (Direct + Indirect): 880,178.00 Nov 30, 2020 Estimated Cost at Completion (E\$AC): 13.125.719.70 Total Budget: 12,808,287.00 Variance (Budget minus E\$AC): -316,329.70 We are currently projecting a deficit of \$316,330 for the total project (from Reason For Variance: last month's surplus of \$17,467). This is about 2.5% of the 5-year budget. The production information we have is still very early. We only had final completion rates for two phases of one replicate at the time these projections updates were made, so these estimates are still rough. In these updates, we assumed the Wave 4 interview would stay long, ~95 minutes. **Projections**

Nov 30, 2020

Dollars Projected For Month: 246,984.00 Actual Dollars Used: 217,971.00 Variance (Projected minus Actual): 29,012.00

Reason For Variance: Salary costs were less than projected.

Measures

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

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 Richard Curtin (SCA)
Investigator/Client Tuba Suzer-Gurtekin (SCA)

Funding Agency

IRB HUM#: Period Of Approval:

Project TeamProject Lead:Theresa CameloBudget Analyst:Dean E StevensProduction 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 Data Col Period Security Plan 12/2019 - 12/2020 12/2020 - 12/2020 NA

Milestone Dates

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

DC Start: 11/23/2020 **DC End:** 12/20/2020

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

entive Not used

Incentive Not u
Administration N/A
Payment Type N/A
Payment Method N/A

Report Period Dec, 2020 (SCA 2020) Project Phase Implementing

Risk Level On Track

Monthly Update SCA DEC 2020 began one day ahead of schedule on NOV 23, and ended as scheduled on DEC 20.

We completed 601 IWs (321,180,100), our goal was 600 (320/180/100), at an overall HPI of 2.88 (our goal was 3.).

Special Issues None to note.

Cost Jan 15, 2021

 Total Cost to Date (Direct + Indirect):
 1,059,103.04

 Estimated Cost at Completion (E\$AC):
 1,059,103.04

 Total Budget:
 1,109,882.00

 Variance (Budget minus E\$AC):
 50,778.96

Reason For Variance: reduced hpi

Projections Jan 15, 2021

Dollars Projected For Month:92,490.17Actual Dollars Used:89,544.77Variance (Projected minus Actual):2,945.90

Reason For Variance: reduced hpi

Measures

	Units Complete	RR	HPI	
Current Goal:	600		3.0	
Goal at Completion:	600		3.0	
Current actual:	601		2.88	
Estimate at Complete:	601		2.88	
Variance:	1		0.12	

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

Funding Agency

National Science Foundation

IRB HUM#:

HUM#: HUM00159711 Period Of Approval: Exempt

Project TeamProject Lead:Andrew L HuppBudget Analyst:Dean E StevensProduction 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 Data Col Period Security Plan Milestone Dates 09/2018 - 06/2020 08/2019 - 11/2019

NA

PreProduction Start:
Pretest End:
Staffing Completed:
SS Train Start:
SS Train End:

DC Start: 10/29/2019 **DC End:** 04/01/2020

Other Project Fram 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

Video Communication Technologies

Names:

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

Dec, 2020 (VCT)

Project Phase

Closina

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. A first draft has been shared with the group and revisions are being made.

The interviewer effects paper has been submitted to JSSAM.

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).

The PI has notified us that we have been awarded additional MiCDA funds. These funds will be used in the new year to support analysis.

We are waiting to hear about our 2021 AAPOR conference submissions.

- -A panel on video at AAPOR (Andrew H. coordinated and submitted, the panel will consist of...
- --A paper on willingness to participate in video interviews (submitted by the New School). Kallan and Andrew H. 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 preand post-election surveys.
- --A paper on recruitment and participation that Kallan will present (Andrew H. is 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

We've been invited to an ESRA panel (likely two different panels) on video interviewing for social surveys, and another session on new communication channels in web-based surveys. Andrew and Kallan are authors on all of the submissions.

- --A paper on recruitment and participation (panel session).
- --A paper on data quality in live video interviews (panel session).
- --A paper on willingness and discomfort answering sensitive questions in live video survey interviews (panel session).
- --A paper on precorded video interviews (closed session)

We've also been working with the data management team on final datasets (Blaise (survey and audit), MSMS, etc) before Matt leaves.

Special Issues

Cost

Jan 31, 2021

Total Cost to Date (Direct + Indirect):357,702.90Estimated Cost at Completion (E\$AC):376,860.20Total Budget:377,455.00Variance (Budget minus E\$AC):9,983.26

Reason For Variance: VM costs are on target. We will not have an under run this large. The

student who has been doing analysis has been charging the PIs grant rather than the SRO funds. There is a meeting scheduling with the PI to discuss these projections and the additional MiCDA funds. Once all of that

has been worked out the projections will be updated.

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

Jan 31, 2021

Dollars Projected For Month:8,459.26Actual Dollars Used:2,313.16Variance (Projected minus Actual):6,146.10

Reason For Variance: We have been projecting PSM student hours. She's been charging the main

grant instead. There is a meeting with the PI to discuss.

Measures

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

Survey Research Operations

Monthly Project Report

Development Initiative and No Data Collection Projects

December 2020



Developmental Initiatives

(TSME21-SelfSchedUI (483424)) Self-Scheduling Interface for MSMS

(TSME21-ST international (483227)) TSME21 - ST international

(TSME21- Illume Upgrade (4424466)) TSME21- Illume Upgrade (4424466)

(TSME21-Blaise 5 Testing (423562)) TSME21-Blaise 5 Testing (423562)

(TSME21-CARI_Player (425842)) TSME21-CARI_Player (425842)

(TSME21-ColdFusion Server Upgrade (425197)) TSME21-ColdFusion Server Upgrade (425197)

(Day in the Life Videos) TSME21-Day in the Life Videos (425201)

(TSME21-DCO Tech System Support) TSME21-DCO Tech System Support (483248)

(TSME21-QC-Systems (483249)) TSME21-QC-Systems (483249)

(TSME21-RCLS (425196)) TSME21-RCLS

(TSME21-Replayer (425267)) TSME21-Replayer

Projects Report Query/Monthly Update Quick Reference

Select Calendar Year 2020 ∨

Project	Type	Status	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Day in the Life Videos	Initiatives	Current												
TSME R-PAY SYSTEM RE-WRITE(483257)	Initiatives	Current												
TSME SRO SYS MAINTENANCE-GENERAL (483910)	Initiatives	Current												
TSME21- Illume Upgrade (4424466)	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	Initiatives	Current												
TSME21-QC-Systems (483249)	Initiatives	Current												
TSME21-RCLS (425196)	Initiatives	Current												
TSME21-Replayer (425267)	Initiatives	Current												
TSME21-SelfSchedUI (483424)	Initiatives	Current									<u></u>	<u></u>	<u></u>	<u></u>
TSME21-ST international (483227)	Initiatives	Current												

Project Name Self-Scheduling Interface for MSMS (TSME21-SelfSchedUI (483424))

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

IRB

Investigator/Client

Funding Agency

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 Data Col Period Security Plan

Milestone Dates

NA

07/2020 - 06/2021

PreProduction Start: Pretest Start:

Pretest End: Recruitment Start:
Staffing Completed: GIT Start:

SS Train Start:

DC Start:

DC End:

Other Project

James Rodgers - Tech Lead

Team Members: Holly Ackerman - Developer (MSMS API and other appointment related work)

Peter Sparks - Developer (R facing page) 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 Dec, 2020 (TSME21-SelfSchedUI (4834 **Project Phase** Planning

Risk Level

Some Concerns

Monthly Update

Work to date has involved additional 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.

No development work happened in December. Andrew and Jim met with the resource TSG assigned (Peter). After having met, Peter sent a message to his supervisor about not wanting to work on the project. The project manager learned about this just before the holiday break. A new resource will be assigned in January after returning from the holiday break. We are still planning on delivering a core UI that can be used, but additional work will likely continue after the PSID launch.

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

Total Cost to Date (Direct + Indirect): 2,892.18 Jan 31, 2021 Estimated Cost at Completion (E\$AC): 30,071.02 Total Budget: 30,000.00 Variance (Budget minus E\$AC): -71.02

> Reason For Variance: An associate director add projections that had taken us from a projected

> > under run to a several thousand dollar overrun. I reworked the projections to bring them back inline. I currently don't anticipate an overrun but we lost a resource n December, a new one will be assigned in January when we

return from the break.

Projections Jan 31, 2021

Dollars Projected For Month: 8.459.26 2.313.63 Actual Dollars Used: Variance (Projected minus Actual): 6.145.63

Reason For Variance: I me with Peter S (the programming resource) twice in December. After

> meeting with him he sent his supervisor an email not wanting to work on the project. The work projected to happen did not. Those projections have been

moved forward.

Measures

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

Estimate at Complete: Variance:

Project Name TSME21 - ST international (TSME21-ST international (483227))

Project Mode Primary: Not Available

Project Type Developmental Initiatives Project Status Current

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

no data Proposal #:

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

feature development

SRO Project Period

07/2020 - 06/2021

Data Col Period Security Plan Milestone Dates

NA

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

Other Project

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

Team Members:

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

Dec, 2020 (TSME21-ST international (Report Period **Project Phase** Implementing

Risk Level On Track

Monthly Update all the project work was hectic, did not work on any development item

Special Issues

Cost

Total Cost to Date (Direct + Indirect): 39,000.00 Jan 31, 2021

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 Jan 31, 2021

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

Measures

Units Complete RR HPI

Current Goal:
Goal at Completion:
Current actual:
Estimate at Complete:
Variance:

Project Name TSME21- Illume Upgrade (4424466) (TSME21- Illume Upgrade (4424466))

Project Mode Primary: Not Available

Project Type Developmental Initiatives Project Status Current

10,000.00 Direct Budget: InDirect Budget: **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: Carl S Remmert

Production Manager:

Senior Project Advisor: Meredith A House

Production Manager: Production Manager:

no data Proposal #:

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

SRO Project Period Data Col Period

07/2020 - 06/2021

Security Plan Milestone Dates

NA

NA

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

Data Col Tool NA Hardware NA **DE Software** NA **QC Recording Tool** NA

Incentive

NA Administration NA **Payment Type** NA **Payment Method** NA

Dec, 2020 (TSME21- Illume Upgrade (4 Initiation Report Period **Project Phase**

Risk Level On Track

We contacted CMT to get the servers ready and contacted DatStat for testing license. **Monthly Update**

Special Issues

Cost

Total Cost to Date (Direct + Indirect): 1.00 Dec 31, 2020

Estimated Cost at Completion (E\$AC): 6,679.00 Total Budget: 13,000.00 Variance (Budget minus E\$AC): 3,321.00

Reason For Variance: Need adjust projections due to staff availability and conflicting project

needs.

Projections Dec 31, 2020

Dollars Projected For Month:2,226.00Actual Dollars Used:0.00Variance (Projected minus Actual):2,226.00

Reason For Variance: Will adjust implementation schedule due to conflicting project needs.

Measures

Units Complete RR HPI

Current Goal:
Goal at Completion:
Current actual:
Estimate at Complete:
Variance:

Project Name TSME21-Blaise 5 Testing (423562) (TSME21-Blaise 5 Testing (423562))

Project Mode Primary: Not Available

Project Type Developmental Initiatives Project Status Current

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

no data Proposal #:

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

testing.

SRO Project Period

07/2020 - 06/2021

Data Col Period Security Plan Milestone Dates

NA

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 NA

QC Recording Tool Incentive

NA Administration NA **Payment Type** NA **Payment Method** NA

Dec, 2020 (TSME21-Blaise 5 Testing (4 Report Period **Project Phase** Implementing

Risk Level On Track

Due to resource limitations, the project is going slow. will spend more time to test Blaise 5.9 after the new year **Monthly Update**

Special Issues

Cost

Total Cost to Date (Direct + Indirect): 1,055.00 Jan 31, 2021

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** Jan 31, 2021

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

Reason For Variance:

Measures

Units Complete RRHPI Current Goal: Goal at Completion: Current actual: Estimate at Complete: Variance:

Project Name TSME21-CARI Player (425842) (TSME21-CARI Player (425842))

Project Mode Primary: Not Available

Project Type Project Status Developmental Initiatives Current

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

Principal

Investigator/Client

Funding Agency

IRB HUM#: Period Of Approval:

Gina-Qian Yang Cheung **Project Team** Project Lead:

> Budget Analyst: Janelle P Cramer

Production Manager: Senior Project Advisor: Production Manager: Production Manager:

no data Proposal #:

This is a small budget development. Due to SSL remote working sitting, we have implemented a new utility, called Description:

CARi_player, for both SCA CARI (in Blaise 4.8) and STARRS-LS W3 (in Blaise5)

SRO Project Period Data Col Period

09/2020 - 01/2021

Security Plan Milestone Dates

NA

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

Dec, 2020 (TSME21-CARI_Player (425 Report Period **Project Phase** Implementing

Risk Level On Track

We will close this project in Jan. SCA made a decision not to use Blaise 4.8 CARI; STARRS-LS is going to continue **Monthly Update**

to use Blaise 5 CARI.

Special Issues

Cost

Jan 31, 2021

Total Cost to Date (Direct + Indirect): 1,579.00 Estimated Cost at Completion (E\$AC): 70,000.00 Total Budget: 10,000.00 0.00

Variance (Budget minus E\$AC):

Reason For Variance: no issue Projections Jan 31, 2021

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

Measures

Units Complete RR HPI

Current Goal:
Goal at Completion:
Current actual:
Estimate at Complete:
Variance:

Project Name TSME21-ColdFusion Server Upgrade (425197) (TSME21-ColdFusion Server Upgrade (425197))

Project Mode Primary: Not Available

Project Type Developmental Initiatives Project Status Current

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

Principal

Investigator/Client

Funding Agency

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

Project Team Project Lead: Hueichun Peng Budget Analyst: Carl S Remmert

> Production Manager: HollyJoyce Stewart Ackerman

Senior Project Advisor: Gregg Peterson

Production Manager: Production Manager:

no data Proposal #:

This initiative plans to upgrade the CF server for Web Logging and PIPPA. Description:

SRO Project Period Data Col Period

07/2020 - 06/2021

Security Plan Milestone Dates

NA

NA

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

Data Col Tool NA Hardware NA **DE Software** NA QC Recording Tool NA

Incentive

NA Administration NA **Payment Type** NA **Payment Method** NA

Dec, 2020 (TSME21-ColdFusion Server Initiation Report Period **Project Phase**

Risk Level On Track

Holly has contacted Joe for feasibility and a more extended timeline. **Monthly Update**

Special Issues

Cost

Total Cost to Date (Direct + Indirect): 1.00 Dec 31, 2020 Estimated Cost at Completion (E\$AC): 9,931.00

Total Budget: 10,000.00 Variance (Budget minus E\$AC): 69.00

Reason For Variance: na Projections Dec 31, 2020

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

Measures

Units Complete RR HPI

Current Goal:
Goal at Completion:
Current actual:
Estimate at Complete:
Variance:

Project Name TSME21-Day in the Life Videos (425201) (Day in the Life Videos)

Project Mode Primary: Not Available

Project Type Developmental Initiatives Project Status Current

18,000.00 Direct Budget: Total Budget: **Budget** InDirect Budget: 18,000.00

Principal

Investigator/Client

Funding Agency

IRB HUM#: Period Of Approval:

Vivienne Y Outlaw **Project Team** Project Lead: Budget Analyst: Carl S Remmert

> Production Manager: Senior Project Advisor: Production Manager: Production Manager:

07/2020 - 06/2021

no data Proposal #:

Funding to be used to update the Day in the Life videos for both the field and SSL. Description:

SRO Project Period Data Col Period

NA

Security Plan 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:

Russ Stark Barb Homburg

Other Project

Names:

Sample Mgmt Sys NA **Data Col Tool** NA Hardware NA

DE Software NA QC Recording Tool NA

NA Incentive Administration NA **Payment Type** NA **Payment Method** NA

Dec, 2020 (Day in the Life Videos) Report Period **Project Phase** Implementing

Risk Level Some Concerns

no hours billed for Deb 2021 due to staff leave **Monthly Update**

Special Issues

Cost

Total Cost to Date (Direct + Indirect): 7,949.44 Jan 31, 2021 Estimated Cost at Completion (E\$AC): 13,414.86

Total Budget: 18,000.00 Variance (Budget minus E\$AC): 4,585.13

Reason For Variance: Not all funds allocated - full scope not defined Projections Jan 31, 2021

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

Reason For Variance: no hours billed for Deb 2021 due to staff leave

Measures

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

Project Name TSME21-DCO Tech System Support (483248) (TSME21-DCO Tech System Support)

Project Mode Primary: Not Available

Project Type Developmental Initiatives Project Status Current

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

Principal

Investigator/Client

Funding Agency

IRB HUM#: Period Of Approval:

Project Team Project Lead: Vivienne Y Outlaw Budget Analyst: Carl S Remmert

Production Manager: Hueichun Peng Senior Project Advisor: Gregg Peterson

Production Manager: Production Manager:

no data Proposal #:

This includes all the support and development work for a suite of tech systems DCO uses, including Fred, Description:

Recruitment Website, Iwer Web Site, etc.

SRO Project Period Data Col Period

07/2020 - 06/2021

Security Plan Milestone Dates

NA

NA

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

Data Col Tool NA Hardware NA **DE Software** NA **QC Recording Tool** NA

Incentive NA Administration NA **Payment Type** NA **Payment Method** NA

Dec, 2020 (TSME21-DCO Tech System Report Period **Project Phase** Implementing

Risk Level On Track

1. Programmed the new 2021 FOTY modules at the lwer website and Fred. **Monthly Update**

2. Programmed the new SRO ID and other related changes in Fred.

3. Programmed the new e-sign module in Fred and at the Iwer website.

Special Issues

Cost

Total Cost to Date (Direct + Indirect): Dec 31, 2020 Estimated Cost at Completion (E\$AC):

10,737.00 22,925.00 Total Budget: 25,000.00 Variance (Budget minus E\$AC): 2,074.73

Reason For Variance: not all budget \$ have been allocated Projections Dec 31, 2020

Dollars Projected For Month:3,670.00Actual Dollars Used:2,072.29Variance (Projected minus Actual):1,595.00Reason For Variance:some tasks moved to January

Measures

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

Project Name TSME21-QC-Systems (483249) (TSME21-QC-Systems (483249))

Primary: Not Available **Project Mode**

Project Status Project Type Developmental Initiatives Current

25,000.00 5,000.00 **Budget** Direct Budget: InDirect Budget: Total Budget: 30,000.00

Principal

Investigator/Client

Funding Agency

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

Sarah Elisa Broumand **Project Team** Project Lead: Budget Analyst: Carl S Remmert

Production Manager:

Senior Project Advisor: Gina-Qian Yang Cheung

Production Manager: Production Manager:

07/2020 - 06/2021

no data Proposal #:

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

SRO Project Period Data Col Period

Security Plan Milestone Dates

NA

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

Dec, 2020 (TSME21-QC-Systems (483) Report Period **Project Phase** Implementing

Risk Level On Track

No work performed on this project. All hours were spent on meeting with QC Implementation team meeting and the **Monthly Update**

analysis team. Planning on using funds on 3rd and 4th quarter to make necessary changes to Olive to adjust to UM id

changes and finishing up some of our project goals that have been on hold.

Special Issues none

Cost

Total Cost to Date (Direct + Indirect): 4,896.93 Dec 31, 2020 Estimated Cost at Completion (E\$AC): 26,409.26

30,000.00 Total Budget: Variance (Budget minus E\$AC): 3,590.74

Reason For Variance: Unable to spend the hours due to other project priorities. Planning on using

funds on 3rd and 4th quarter.

Projections Dec 31, 2020

Dollars Projected For Month:2,418.66Actual Dollars Used:310.07Variance (Projected minus Actual):2,108.58

Reason For Variance: Unable to spend the hours due to other project priorities. Planning on using

funds on 3rd and 4th quarter.

Measures

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

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: Carl S Remmert

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 Data Col Period 07/2020 - 06/2021

Security Plan
Milestone Dates

NA

PreProduction Start:
Pretest End:

Staffing Completed:
SS Train Start:
DC Start:

Pretest Start:
Recruitment Start:
GIT Start:
SS Train End:
DC End:

Other Project Team Members:

Other Project Respondent Lookup

Sample Mgmt Sys

Names:

SurveyTrak; SMS; Web SMS; MSMS

Data Col Tool N

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 Dec, 2020 (TSME21-RCLS (425196)) Project Phase Implementing

Risk Level On Track

Monthly Update Work is proceeding, but other sponsored projects took priority.

Special Issues

Cost

 Total Budget:
 15,000.00

 Variance (Budget minus E\$AC):
 8,439.38

Reason For Variance: Other sponsored projects took priority.

Projections Dec 31, 2020

Dollars Projected For Month:2,497.36Actual Dollars Used:84.52Variance (Projected minus Actual):2,412.87

Reason For Variance: Other sponsored projects took priority.

Measures

Units Complete RR HPI

Current Goal:
Goal at Completion:
Current actual:
Estimate at Complete:
Variance:

Project Name TSME21-Replayer (TSME21-Replayer (425267))

Project Mode Primary: Not Available

Project Type Project Status Developmental Initiatives Current

Direct Budget: 5,000.00 5,000.00 **Budget** InDirect Budget: 0.00 Total Budget:

Principal

Investigator/Client

Funding Agency

SRC and HRS

IRB ним#: **Project Team** Project Lead:

Period Of Approval: Jennifer C Arrieta

Budget Analyst: Carl S Remmert

Production Manager:

Senior Project Advisor: Gina-Qian Yang Cheung

Production Manager: Production Manager:

no data Proposal #:

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 Data Col Period

09/2019 - 06/2021

Security Plan **Milestone Dates**

NA

Replaher

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

Other Project

Youhong Liu, Colette Keyser, Jason Ostergren

Team Members:

Other Project

Names:

Sample Mgmt Sys **Data Col Tool**

NA 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 Dec, 2020 (TSME21-Replayer (425267) Implementing **Project Phase**

Risk Level On Track

During the month, the team focused on programming and testing bug fixes and new features (e.g., display of F2 **Monthly Update**

notes) in the Replayer utility. In addition, the team continued to discuss the requirements and design needed for set-up and deployment for the targeted primary users (Project Managers, Production Managers, Clients) of this utility.

Special Issues

Cost Dec 31, 2020

Total Cost to Date (Direct + Indirect):2,224.00Estimated Cost at Completion (E\$AC):3,491.00Total Budget:5,000.00Variance (Budget minus E\$AC):1,509.00

Reason For Variance:

Majority of programming the utility has been done by Jason Ostergren and

covered by HRS funds.

Projections Dec 31, 2020

Dollars Projected For Month:507.00Actual Dollars Used:475.00Variance (Projected minus Actual):32.00

Reason For Variance: Minimal variance

Measures

Units Complete RR HPI

Current Goal:
Goal at Completion:
Current actual:
Estimate at Complete:
Variance: