Survey Research Operations

Monthly Project Report

Sponsored

January 2021

Sponsored Projects

(ACL-LIFE) ACLLIFE Life History Interview and Validation (ACLLIFE)
(AFHS) American Family Health Study
(ACL6) Americans' Changing Lives - Wave 6
(BFY) Baby's First Years
(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
(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) 2021) Monitoring the Future Panel (web) 2021
(MTF HID) MTF High Intensity Drinking
(NCCS 2021) National Campus Climate Survey
(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 2021) Surveys of Comsumer Attitudes
(VCT) Video Communication Technologies in Survey Data Collection

NonArchived Sponsored Projects

Project	Type	Status	Jan	Feb
ACL6	Sponsored	Current	🟢	☐
ACL-LIFE	Sponsored	Current	🟡	☐
AFHS	Sponsored	Current	🟢	☐
BFY	Sponsored	Current	🟢	☐
C.A.R.E.	Sponsored	Current	🟢	☐
CBII	Sponsored	Current	🟢	☐
CDS-19	Sponsored	Current	🟢	☐
DAWN CS	Sponsored	Current	🟢	☐
ECHO	Sponsored	Current	🟢	☐
EDCPE	Sponsored	Current	🟡	☐
EDC-Semi Structured	Sponsored	Current	🟢	☐
H&WB	Sponsored	Current	🟡	☐
HCAP 2020	Sponsored	Current	🟢	☐
HCDC, H&C	Sponsored	Current	🟢	☐
HRS 2020	Sponsored	Current	🟡	☐
HRS 2020 ABT	Sponsored	Current	🟡	☐
IHDS3	Sponsored	Current	🟢	☐
MARS 2	Sponsored	Current	🟢	☐
MTF base year 2017-2022	Sponsored	Current	🟢	☐
MTF HID	Sponsored	Current	🟢	☐
MTF Panel (main data collection) 2021	Sponsored	Current	🟢	☐
NCCS 2021	Sponsored	Current	🟢	☐
PSID21	Sponsored	Current	🟡	☐
SCA 2021	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 Team
Project Lead: Terri Ann Ridenour
Budget Analyst: Grace Tison
Production Manager:
Senior Project Advisor: Shonda R Kruger-Ndiaye
Production Manager:
Production Manager: Pooja Varma-Laughlin

Proposal #: no data

Description: This project will conduct a Life History interview with the Americans' Changing Lives (ACL) panel by telephone using centralized SSL interviewers (and possibly Field interviewers, if necessary).

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

Milestone Dates

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

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

TBD: Production Assistant

Helen (Hongyu) Johnson: SSI
Debra Heier: SSA (Project Coordination)

Jeff Smith: SurveyTrak Programmer
Ashwin Dey: WebTrak, Weblog Programmer
Karl Dinkelmann: CAI Programmer-Blaise

Carlos Macuada: Data Manager
Chris Greene/Stephanie Windisch (ACL6 Data Managers): ACL-LIFE Data Management Consultants

Andrea Pierce: Help Desk

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

Report Period	Jan, 2021 (ACL-LIFE) **Project Phase** Planning
Risk Level	*Some Concerns*

Monthly Update

The Study Office received IRB approval on the study protocols and data collection instruments. The SRO project team is preparing the pre-interview mailing (letter and consent overview), life-history grid and response booklet mailing this week.

SRO's pre-production work is wrapping up. Three, remote training sessions will be offered this week, and a "Production Resource Hub" has been developed in Canvas. 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 and comprehensive testing continues and PI/project team sign off is expected this week for production launch on Monday, February 22.

Special Issues

Cost
Feb 15, 2021

Total Cost to Date (Direct + Indirect):	196,800.05
Estimated Cost at Completion (E$AC):	756,729.59
Total Budget:	734,193.00
Variance (Budget minus E$AC):	-22,536.59
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 Iwers staffed on the project.

Our future projections now reflect an increase in hours to program the Blaise instrument to the client's full specification, including the life-history calendar grid, and additional historical events functionality requested by the PI. Projections also include the current hybrid staffing plan (8 SSL Iwers; 8 Field Iwers; and 2 Field TLs). The higher rates of Field staff (vs. SSL staff budgeted) contribute to the projected overrun balance.

Projections
Feb 15, 2021

Dollars Projected For Month:	60,749.84
Actual Dollars Used:	51,851.69
Variance (Projected minus Actual):	8,898.15
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 February cost report.

Measures

	Units Complete	RR	HPI
Current Goal:	1,026 (n=1,283)	80%	5
Goal at Completion:			
Current actual:			
Estimate at Complete:			
Variance:			

Other Measures

Project Name	American Family Health Study (AFHS)
Project Mode	Primary: Web Secondary: Mail Total of Modes: 3
Project Type	Sponsored Projects

				Project Status	Current

Budget	***Direct Budget:***	1,596,238.00	***InDirect Budget:***	893,875.00	***Total Budget:***	2,490,133.00

Principal Investigator/Client	Brady West (Survey Research Center) William Axinn, Mick Couper and James Wagner (Survey Research Center)
Funding Agency	National Institutes of Health (NIH)
IRB	***HUM#:*** 00167171 ***Period Of Approval:***

Project Team	***Project Lead:***	Rebecca Gatward
	Budget Analyst:	Dean E Stevens
	Production Manager:	Pooja Varma-Laughlin
	Senior Project Advisor:	Grant D Benson
	Production Manager:	
	Production Manager:	

Proposal #:	no data

Description:

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

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

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

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

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

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

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

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

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

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

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

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

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

o   An experiment around completion of the modules has been introduced to the protocol. Twenty per cent of the selected eligible respondents will be invited to complete the full 60 minute survey as one instrument, rather than

completing three separate modules.

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

Milestone Dates

PreProduction Start:	05/03/2019	*Pretest Start:*	
Pretest End:		*Recruitment Start:*	
Staffing Completed:		*GIT Start:*	
SS Train Start:		*SS Train End:*	
DC Start:	04/21/2020	*DC End:*	10/31/2021

Other Project Team Members:	SRO Team: Leah Roberts, Andrew Hupp, Matt Hanger, Neil Erikson, Pooja Varma-Laughlin, Jim Rodgers, Keith Liebetreu, Colette Keyser
Other Project Names:	During the budget proposal stage this project was known as 'A More Efficient Web-Based Approach to Collecting National Family, Fertility and Reproductive Health Data'.
Sample Mgmt Sys	MSMS
Data Col Tool	Blaise 5; SAQ
Hardware	Desktop
DE Software	Other (Blaise 5 (for Mail questionnaires)); External vendor (TBD)
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post (Modules 1 - $20, Module 2 - $20 and Module 3 - $30); Cash, prepaid (Screener IW - $2 Potentially
Payment Method	Check through STrak RPay System; Check through other system (Info. from MSMS and transfer information via

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Report Period	Jan, 2021 (AFHS)	**Project Phase**	Implementing

Risk Level	*On Track*
Monthly Update	January update

- Projections have been updated (including requesting updated estimates from DataForce) in line with decision changes for Replicate 2.
- 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.
- We are also working through making updates to some production data for Replicate 1 cases. Changes have been implemented (in MSMS and Blaise DM) to prevent this being necessary in the future.

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

Cost
Feb 17, 2021

Total Cost to Date (Direct + Indirect):	1,272,565.42
Estimated Cost at Completion (E$AC):	2,452,331.58
Total Budget:	2,490,133.00
Variance (Budget minus E$AC):	37,801.42
Reason For Variance:	The estimated cost at completion has been increased since last month. Projections have recently been updated to reflect design changes to be implemented for Replicate 2. These changes include increasing the sample size by around 3,000 and sending a higher proportion of the non-responders, at the screening stage, an increased TOA. Other design changes will be implemented focusing on optimising data quality. Any underspend will be used by the end of the project.

Projections
Feb 17, 2021

Dollars Projected For Month:	31,035.46
Actual Dollars Used:	26,083.22
Variance (Projected minus Actual):	4,952.24
Reason For Variance:	We received a refund for a two printers purchased (one ordered in error and one was not appropriate for it's intended use) this accounts for the difference in non-salary actuals vs projections. The salary projections were less than actuals - this is partly due to bring forward some datamodel changes rather than wait until the end of the Replicate 1 data collection (when we had hours projected for any changes).

Measures

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

Other Measures

Project Name	Americans' Changing Lives - Wave 6 (ACL6)
Project Mode	Primary: Telephone Secondary: Face to Face Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 495,251.00 **InDirect Budget:** 277,340.00 **Total Budget:** 772,591.00
Principal Investigator/Client	Margaret Hicken (University of Michigan, SRC - SEH)

Funding Agency National Institutes of Health, National Institute on Aging

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

Project Team
Project Lead: Terri Ann Ridenour
Budget Analyst: Grace Tison
Production Manager: Lisa J Carn
Senior Project Advisor: Shonda R Kruger-Ndiaye
Production Manager:
Production Manager: James Koopman

Proposal #: no data

Description: Led by Dr. Maggie Hicken, ACL6 will build on 5 waves (25 years) of data from the nationally-representative Americans' Changing Lives (ACL) study by adding a 6th wave of data collection (ACL6), along with blood collection for DNA methylation analysis. With ACL6, there will be data for over 30 years of neighborhood chemical and non-chemical stressors experienced cumulatively over adulthood, which the investigators will link to DNA methylation and then examine the impact on healthy aging. The objective of ACL6 is to identify underlying epigenomic mechanisms linking racial residential segregation to key markers of healthy aging, for which there are known inequalities.

The ACL6 project period began in July of 2018, with SRO involvement starting in September of 2018. The data collection period is April to August 2019.

SRO's work scope includes survey data collection and Home Visit coordination. SRO will build systems that: 1) equip SSL interviewers (and potential low-level field interviewers at the end of the study) with tools to conduct survey data collection and sample management; 2) provide a basic mechanism (i.e. Weblog) for the Study Coordinator to log written consent received for the Home Visit, log specimen chain of custody and support SSL follow up efforts (reminder call outcomes); 3) support SRO coordination between the Core Study Team (CST), ExamOne, the 3rd party vendor responsible for Home Visit (health assessment, blood sample collection and health-related measurements), and CLASS lab biorepository; and 4) serve basic reporting needs to provide regular progress updates during the production period.

There is a broad overlap with the ACL5 study with about 15% of the questionnaire requiring revisions and additional items for Wave 6. SRO is responsible for the documentation for the complete ACL6 instrument, programming specifications in Blaise 4.8, developing SurveyTrak sample management system for use in the SSL, building the Weblog interface and creating Reports.

The Core Study Team (CST) conducted locating procedures and updated sample records with information about deceased members, prior to delivery of sample to SRO. Newsletters were sent to all living members of the Americans' Changing Lives cohort who participated in any of the previous 5 waves and asked to participate in Wave 6. All surviving ACL respondents (~1,526) are eligible to participate; there will be no screening for participation. After CST delivers the final ACL6 sample, SRO prepares/loads in SurveyTrak sample management system. On April 22 SRO mailed the pre-interview letter to potential interview participants, along with a prepaid incentive ($30) to participate in the interview.

A 60-minute telephone interview will be conducted. Respondents will be asked to provide information on various social, economic, psychological, and health matters. SRO assumes 1,220 interviews will be successfully completed (an 80% response rate). It is also anticipated that more interviews may be conducted by proxy this wave (approximately 108 proxy interviews last wave). Although the data collection will primarily be conducted by SSL interviewers, SRO's systems will support the possibility of interviews to be conducted face-to-face for respondents who cannot be reached by telephone or prefer an in person visit. As data collection unfolds, SRO will revisit the need for face-to-face work with the PI and prepare a budget estimate for the scope of work based on location of respondents and other factors.

After the survey is completed, or the interview is suspended, the Interviewer will discuss the Home Visit and ask if the R is interested in participating. If R agrees, the Interviewer will obtain oral consent for the R to be contacted by ExamOne to schedule this Home Visit. SRO will send the R a pre-home visit packet by mail, which includes: (a) a letter briefly describing this second part of the study; (b) two copies of the consent form, one to sign and provide to the ExamOne Health Professional (HP) and one to keep; and (c) a $50 incentive for participating in the Home Visit.

During the Home Visit, the Health Professional (HP) will collect the signed informed consent document. The signed U-M consent form will be mailed by ExamOne to the Home Visit Study Coordinator and logged in Weblog.

SSL interviewers will be responsible for reminder calls related to the Home Visit (e.g. Rs who do not schedule their appointment with vendor). Iwers will use the Weblog system to record outcomes.

SRO Project Period	09/2018 - 09/2019
Data Col Period	04/2018 - 08/2019
Security Plan	NA

Milestone Dates

PreProduction Start:		*Pretest Start:*	
Pretest End:		*Recruitment Start:*	02/25/2019
Staffing Completed:		*GIT Start:*	04/01/2019
SS Train Start:	04/02/2019	*SS Train End:*	04/03/2019
DC Start:	04/23/2019	*DC End:*	09/14/2019

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

Report Period	Jan, 2021 (ACL6)	**Project Phase**	Implementing
Risk Level	*On Track*		

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
Feb 28, 2021

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
Feb 28, 2021

Dollars Projected For Month:	0.00
Actual Dollars Used:	-69.79
Variance (Projected minus Actual):	-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:	1,058 (1,526 sample)	80%	5
Goal at Completion:			
Current actual:	729	54%	6.7
Estimate at Complete:			
Variance:			

Other Measures   Home Visit Consent

Goal at Completion: 700

Current Actual: 413
Current Undecided: 20

Project Name	Baby's First Years (BFY)
Project Mode	Primary: Face to Face Total of Modes: 1
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 4,330,584.00 **InDirect Budget:** 1,797,114.00 **Total Budget:** 6,127,698.00
Principal Investigator/Client	Dr. Greg Duncan (University of California - Irvine) Dr. Kimberly Noble (Teachers College Columbia University) Dr. Katherine Magnuson (University of Wisconsin)
Funding Agency	National Institute of Child Health and Human Development (NICHD)
IRB	**HUM#:** HUM00137963 **Period Of Approval:**

Project Team

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

Proposal #:   no data

Description:

University of Michigan Survey Research Center (U-M SRC) is contracted to recruit and interview participants for Baby's First Years -- a longitudinal randomized control trial study.

The study's full name, listed on sub-contract documents, is Household Income and Child Development in Early Years. The study will draw on a convenience sample of mothers and their newborns in four US metropolitan areas: New York City; Omaha/Lincoln; New Orleans; and Minneapolis. One or two hospitals, listed in this application, will be used as recruiting sites in each area. The study uses a randomized control trial design in which low-income mothers and newborns will be randomly assigned to a treatment group that receives an unconditional income enhancement -- cash payments of $333 per month—an amount roughly comparable to a variety of income assistance policies in the U.S. and shown to be associated with meaningful improvements for poor children in prior studies—or to a control condition that receives $20 per month. In both groups, the payments will be made for the first 40 months of the child's life. To understand the impacts of added income on children's development, researchers will assess treatment/control group differences at ages 1, 2 and 3 on measures of cognitive, language, memory, self-regulation and socio-emotional development. Recruitment is scheduled to start in April of 2018, and each follow-up interview will be conducted 12 months later -- close in time to the child's 1st, 2nd, and 3rd birthday. The feasibility of the approach has been established in a one-year pilot conducted in 2014 at the New York Presbyterian Hospital/Columbia University Medical Center.

The Principal Investigators are Dr. Greg Duncan from University of California Irvine (UCI), Dr. Kimberly Noble from Teacher's College Columbia University (TCCU), and Katherine Magnuson from University of Wisconsin-Madison (UWM). UCI (Dr. Duncan) and TCCU (Dr. Noble) are the institutions and signatories funding the U-M SRC subcontract from various sources including the National Institute for Child Health and Human Development (NICHD) and private foundations listed in this application. The study research team also includes co-investigators Lisa Gennetian (New York University), and Hiro Yoshikawa (New York University).

SRO will be responsible for four interactions with the selected mothers/infants:
• Baseline will occur immediately (within 24-48 hours) after birth, in the hospital;
• Wave 1 will be a telephone interview with the mother when the child is 12 months old;
• Wave 2 will be an in-person interview in the family's home that includes survey, developmental assessment, biomarker collection, and video recorded behavioral interaction when the child is 24 months old;
• Wave 3 will be an in-person survey done while the mother and child are visiting a lab for other clinical tests when the child is 36 months old.

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

Recruitment/Baseline: 04/01/2018 - 03/31/2019
       Wave 1: 04/01/2019 - 03/31/2020
       Wave 2: 04/01/2020 - 03/31/2021
       Wave 3: 04/01/2021 - 03/31/2022

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

Milestone Dates

PreProduction Start:	10/01/2017	*Pretest Start:*	
Pretest End:		*Recruitment Start:*	01/01/2018
Staffing Completed:	02/07/2018	*GIT Start:*	03/19/2018
SS Train Start:	03/20/2018	*SS Train End:*	03/22/2018
DC Start:	05/07/2018	*DC End:*	06/30/2022

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

Other Project Names: HHICD Household Income and Childhood Development

Sample Mgmt Sys MSMS
Data Col Tool Blaise 5
Hardware Laptop; [UM cell] Phone
DE Software N/A
QC Recording Tool Other (to be specified)
Incentive Yes, R
    Administration SRO Group
    Payment Type Cash, prepaid (50)
    Payment Method Check through other system (MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (MSMS)

Report Period Jan, 2021 (BFY)   **Project Phase** Implementing

Risk Level   *On Track*

Monthly Update   Project updates:

BFY Age 2 continues on pace and meeting overall goals. We are currently @ 56% completion rate which exceeds Age 1 by 5% pts. The team is monitoring a differential response rate of control vs. treatment cases. We have stopped release of treatment cases to even out the time to complete / response rate and, subsequently, the gap between Control/Experiment has decreased from around 4% 4 months ago to about 2.4%. Keeping with production goals and reducing the gap has been applauded by the PIs. Other than minor adjustments to data collection strategies there are no issues to report. BFY has been approved by U-M to restart in-person locating visits however, the project is awaiting a decision by the IRB of record - TCCU - to resume in-person work. TCCU is conducting a full board meeting on the topic on 2/17. BFY rolled out interviewer retention bonus paying out $60 over the next 5 months for a $300 in total to every iwer in good standing. Some of the BFY interviewers were also asked to help with the HRS Covid Antibody study which will provide more hours as well. Work on Age 3 has started with instrument programming, preload building, and collecting requirements for MSMS refinements. Preliminary scope of Age 3 includes a maternal survey similar to Age 2 administered via phone. The capstone lab visit conducted by the PIs is delayed due to Covid until age 3.5 - 4. U-M proposal to continue following up with Moms ages 3 - 4 before the lab visit has been accepted extending U-M involvement in BFY through 2023.

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

	Goal	Actual	+/-
Overall	553	566	13
Nebraska		165 176	11
New York		146 144	-2
Minnesota		72 74	2
Louisiana		170 172	2

Staffing:

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

Technical system:

BFY is experiencing some issues with DRI and new BCI is being tested and released. Work on Age 3 has commenced with instrument programming. We don't anticipate expansive development of MSMS other than refinement of the existing features and capitalizing on ongoing development.

Finances:

Total project overrun has increased despite savings in Direct (salary/non-salary) costs since it has been communicated to the PIs. This 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). In January, despite direct -$14K underrun the overrun has increased. This increase does not yet include estimated + $7K in CASIC adjustments.

Special Issues

Cost
Feb 28, 2021

Total Cost to Date (Direct + Indirect):	4,963,543.67
Estimated Cost at Completion (E$AC):	6,866,441.93
Total Budget:	6,127,698.00
Variance (Budget minus E$AC):	-438,116.20
Reason For Variance:	Projected overrun continues to grow despite savings in direct costs due to difficulties projecting a mixed-funding flow of indirects. Current overrun is ~ $40K higher than the amount communicated to the PIs in October 2020.

Projections
Feb 28, 2021

Dollars Projected For Month:	73,965.70
Actual Dollars Used:	59,634.43
Variance (Projected minus Actual):	14,331.27
Reason For Variance:	Over-projection of iwer time and less in management costs.

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:			

Other Measures

Project Name	Concussion Assessment, Research and Education (CARE) Consortium (C.A.R.E.)
Project Mode	Primary: Telephone Secondary: Mail Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 1,092,924.28 **InDirect Budget:** 284,160.14 **Total Budget:** 1,377,084.42
Principal Investigator/Client	Dr. Steven Broglio (U of M Kinesiology) Dr. Michael McCrea (Medical College of Wisconsin) Dr. Thomas McAllister (Indiana University School of Medicine)
Funding Agency	
IRB	**HUM#:** **Period Of Approval:**
Project Team	**Project Lead:** Donnalee Ann Grey-Farquharson **Budget Analyst:** William Lokers **Production Manager:** Kathleen S Ladronka **Senior Project Advisor:** Barbara Lohr Ward **Production Manager:** **Production Manager:**
Proposal #:	no data
Description:	This budget assumes an overall SRO involvement period of 24 months commencing in January 2019 with data collection taking place during a 20-month period, beginning April 2019. The total cost for this work is estimated at $1,034,833 ($821,295 direct, $213,538 indirect), budgeted at the NCAA's published indirect cost recovery rate of 26%. SRO will provide consultation, respondent location activities and data collection for the NCAA-DoD Grand Alliance (Cumulative and persistent effects of concussion and repetitive head impact exposure: An intermediate follow-up study of US Military Service Academy members and NCAA student-athletes in the CARE Consortium) project. Specifically, SRO will provide consultation on respondent locating and panel maintenance procedures and instruments, locate and contact respondents by mail and phone to prompt them to access the online data collection questionnaire, and conduct telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web. The estimate assumes that approximately 7,500 (approximately 5,000 in the first year and 2,500 in the second year of the project) respondents are included in the initial outreach/email request to complete the online instrument by your research team, and that approximately 20% comply. The remaining 6,000 respondents will be followed up by SRO with locating, further contacts and prompting to complete the web survey. Finally, we anticipate direct outreach by telephone interviewers with access to the online application. All respondent incentives will be paid by the research staff.
SRO Project Period	12/2018 - 05/2021
Data Col Period	02/2019 - 03/2021
Security Plan	NA

Milestone Dates

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

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

Other Project Names:

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

Report Period	Jan, 2021 (C.A.R.E.)	**Project Phase**	Implementing

Risk Level	*On Track*

Monthly Update

Project Management:
- Projection and budget reflect estimates for data collection to March 31 and post data collection work to May 2021. It is confirmed that data collection will extend to April 30 with post work continuing into June. Extra funds will be made available from the PIs to cover the newly planned work extension.

- 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:
-
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

Production Stats as of 1/31/2021:
Overall RR: 37.60%
Total Released Cases: 7687
Total Complete IW: 2630
Total Complete WEB IWs = 2428; CATI Comp Iws= 202

Special Issues

Cost
Jan 31, 2021

Total Cost to Date (Direct + Indirect):	1,115,144.45
Estimated Cost at Completion (E$AC):	1,338,852.65
Total Budget:	1,377,084.42
Variance (Budget minus E$AC):	38,231.77
Reason For Variance:	Projection will be adjusted to reflect the full work scope for the data collection extension.

Projections
Jan 31, 2021

Dollars Projected For Month:	62,681.63
Actual Dollars Used:	51,296.56
Variance (Projected minus Actual):	-11,385.07
Reason For Variance:	Field hours are a less than projected.

Measures

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

Other Measures

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

Project Status Current

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

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

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

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

Report Period	Jan, 2021 (DAWN CS)	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update

The last reminder mailing for ABS non-responders was sent out on 2/8. The screener project was released to interviewers, with approximately 320 sent to each one. To date, interviewers have finalized 183 screening interviews and identified 36 eligible respondents (24 black, 12 MENA).

So far, 83 letter recipients have completed the Qualtrics self-scheduler. Fifty one letter recipients reported that someone aged 60 or older lives at that address and have selected a time for our interviewers to call and complete a screener interview.

Overall, our field team has finalized 152 main interviews (147 in English and 5 in Arabic). There are four scheduled appointments for this week.

To date, interviewers have charged a total of 928 of the 2,078 working hours available for production. Since launching the survey, the field team has completed 25% of the completed interview goal and charged 44% of all available hours. The projected HPI for ABS sample is 3.75 and the current HPI has climbed to 6.1 Average interview length is 38.3 minutes.

Special Issues

    Almost half (998) of the 2,100 phone numbers attempted by interviewers have been disconnected or belong to businesses and not residential addresses. After meeting with Dan Zahs and the LCD team, it has been decided to move to an RDS approach.

•   The LCD team met with Sunghee Lee and is looking at the option of distributing coupons with respondents and encouraging them to pass to their network members.

•   The proposed design is described below:

o   The contact protocol would be modified to include sending three coupons to any ABS black or MENA respondents who complete the interview. Coupons can be sent to the Rs via email or text message.

o   Each coupon would contain a unique identifier that would allow us to track the number of coupons sent out and to link them to the "seed" respondent for reporting purposes.

o   The recipient of a coupon can contact SRO via the Qualtrics Self Scheduler (already in place), our study address, or the 800 line. Once contacted, we would create a new sample line in the ST screener project, contact the informant and conduct the screener interview. If the informant or someone in their household is eligible, a main line will be spawned in the ST Main project, as per usual.

o   If the recipient of a coupon completes the main interview, the seed respondent would receive an additional $5 TOA.

•   We have an estimate for programming hours for ST as well as for reporting systems and an estimate for testing hours. We are working on projecting the impact this would have on our budget, including the estimated cost of offering the additional $5 incentive.

•   Given the low contact and eligibility rates that we are seeing so far, SRO recommends that we halt production until the new systems and protocols are in place to preserve the interviewer hours. We expect that the time to program and test the new systems will be between 2 two and three weeks.

Cost
Jan 31, 2021

Total Cost to Date (Direct + Indirect):	203,125.00
Estimated Cost at Completion (E$AC):	430,212.00
Total Budget:	471,057.00
Variance (Budget minus E$AC):	40,845.00
Reason For Variance:	Lower number of interviewer hours used because of poor sample performance.

Projections
Jan 31, 2021

Dollars Projected For Month:	62,703.00
Actual Dollars Used:	60,863.00
Variance (Projected minus Actual):	1,841.00
Reason For Variance:	Minimal variance

Measures

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

Other Measures

Project Name	Environmental Influences on Child Health Outcomes (ECHO)
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 261,360.00 **InDirect Budget:** 146,362.00 **Total Budget:** 407,722.00
Principal Investigator/Client	Nigel Paneth (Michigan State University) Michael Elliott (University of Michigan) Jean Kerver (Michigan State University)
Funding Agency	NIH
IRB	**HUM#:** HUM00139050 **Period Of Approval:** 10/2/2020-8/13/2021
Project Team	**Project Lead:** Terri Ann Ridenour **Budget Analyst:** Parina Kamdar **Production Manager:** **Senior Project Advisor:** Evanthia Leissou **Production Manager:** Ian Ogden **Production Manager:** Sharon K Parker
Proposal #:	no data

Description:

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

The study includes two sample cohorts: a cohort from previous, ongoing data collection efforts as well as new sample. This existing sample cohort includes mothers and children recruited in 2011 or later for the Archive for Research in Child Health (ARCH) study in the Lansing area. The newly recruited sample cohort, MARCH (Michigan Archive for Research in Child Health), will consist of 1,100 pregnant women: 1) a statewide probability sample of 1,000 women from 20 prenatal clinics affiliated with 10 hospitals located in Ann Arbor, Dearborn, Detroit, Grand Rapids, Novi, Saginaw, Port Huron and Traverse City, and 2) 100 women from one clinic in Flint.

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

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

The sample recruitment and administration of prenatal interviews is conducted by MSU-employed (and other hospital-employed) interviewers using SRO's technical systems and laptops. SRO programmed all questionnaires administered during recruitment, the sample management system(s), and the system to keep track of the collection and storage of blood and urine samples. When babies are born, the research team obtains hospital birth records for the mother and child and a placenta sample. The first MARCH babies were born in early 2018.

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

SRO Project Period	01/2017 - 08/2023
Data Col Period	05/2018 - 03/2023
Security Plan	NA

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

Other Project Team Members:

Ian Ogden: Project Manager
Parina Kamdar: Financial Analyst
Gregg Peterson: Senior Technical Advisor
Jeff Smith: Technical Lead
Mark Simonson and Andrew Piskorowski: Data Managers (Phase 1)
Brad Goodwin: Data Manager (Phase 1)
Jeff Smith: Systems Programmer
Ashwin Dey: Systems Programmer
Hueichun Peng: CAI Programmer-Illume
Jim Hagerman: CAI Programmer-Blaise
Shaowei Sun: Biospecimen Logging Application Programmer
Deb Wilson: Help Desk

Other Project Names:

Sample Mgmt Sys	SurveyTrak; Illume
Data Col Tool	Blaise 4.8; Illume
Hardware	Laptop; Tablet; [UM cell] Phone; Paper and Pencil
DE Software	Other (Custom Biospecimen Logging Application)
QC Recording Tool	Camtasia
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post ($20 (3-Month IW), $20 (Biospecimen))
Payment Method	Check through STrak RPay System

Report Period	Jan, 2021 (ECHO)	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update   Re-Engagement Plan

Recruitment in 4 prenatal clinics is active and beginning to pick up pace. There have been 37 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. The new prenatal protocol recently approved by IRB allows women to include their spouse at the 2nd prenatal visit with the recruiter. This new protocol has helped with recruitment efforts.

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

Production Stats

To date, 881 women have been recruited in clinics. Among those cases, 724 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: 702
    3-month interviews completed: 499
    3-month biospecimen collected: 306

Average attempts / Iw: 7.6
Iw length: 31.41
Response Rate: 72%

Special Issues

Cost
Feb 09, 2021

Total Cost to Date (Direct + Indirect):	142,808.86
Estimated Cost at Completion (E$AC):	341,629.84
Total Budget:	407,722.00
Variance (Budget minus E$AC):	66,092.16

Reason For Variance: The project has a growing underrun, which is expected. Dr. Elliott has informed the PI, Dr. Paneth, and the MSU study office team. Prenatal enrollment by non-SRO recruiters has started to pick up (Phase 1).

We now 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 now until 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, as we work on the budget for Y6, we will discuss with the client the updated workscope, budget and likely request the use of carry forward funds.

Projections
Feb 09, 2021

Dollars Projected For Month:	29,310.32
Actual Dollars Used:	26,147.92
Variance (Projected minus Actual):	3,162.40

Reason For Variance: We've had to shift Blaise programming Jim is doing to February and possibly early March. The client / PIs just made final cuts to the questionnaire and passed those on to our team this week. The updated 3 month instrument accommodates the required ECHO-wide protocol data collection elements and is expected to be released to production this month.

Measures

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

Other Measures

Project Name	Every Dollar Counts Program Evaluation (EDCPE)
Project Mode	Primary: Face to Face Total of Modes: 1
Project Type	Sponsored Projects

Project Status Current

Budget	**Direct Budget:** 2,011,810.00 **InDirect Budget:** 603,543.00 **Total Budget:** 2,615,353.00
Principal Investigator/Client	Y Combinator Research Dr. Elizabeth Rhodes (Y Combinator Research) Dr. Sarah Miller (University of Michigan)
Funding Agency	
IRB	**HUM#:** HUM00145626 **Period Of Approval:**
Project Team	**Project Lead:** Karin Schneider **Budget Analyst:** Megan Gomez-Mesquita **Production Manager:** Barbara Aghababian-Homburg **Senior Project Advisor:** Kirsten Haakan Alcser **Production Manager:** Donnalee Ann Grey-Farquharson **Production Manager:** Carlos Andres Macuada Lopez
Proposal #:	no data
Description:	Y Combinator Research (YCR) and affiliated researchers at Stanford University are undertaking this randomized controlled trial as an exploration of an alternative to the traditional social safety net. Basic income is a method of redistributing resources to address economic insecurity. This study will examine individual-level effects of the receipt of monthly unconditional payments.

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

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

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

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

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

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

Sample Control Systems:
•   SRO will customize our sample management system to control all screened sample provided by YRC, and track all appointments, progress, and outcomes at each sampled address for both the pilot and main data collection.

Training:
•   SRO will hire and train approximately 28 total interviewers (including three interviewers to conduct the pilot) data collection. Separate trainings will be held in each state for the main study and one training will be held for the pilot.
•   SRO will develop all study-specific interviewer training materials in consultation with YCR.

- Interviewers new to SRO (approximately 23) will receive approximately two days of training on general interviewing techniques. The entire interviewing staff will then receive approximately two additional days of training on study-specific protocols.
- Approximately 30% of the field staff will be bilingual.

Data Collection:
- For the main data collection, SRO will visit approximately 3,500 addresses of screened households up to three times to confirm participation and conduct the baseline data collection with 3,000 participants
- o Two regions included: 1500 participants in Michigan, 1500 in California
- o Multi-county area in Michigan (assumed to include Wayne, Oakland, Macomb and Genesee counties) and a multi-county area in California (potentially, Sacramento, San Joaquin, Stanislaus, and Merced counties)

- o At each eligible household, SRO will:
- □ Confirm participation consent
- □ Request authorization to access participants' records in administrative data, and contact information for friends and family to help locate the participant if we cannot reach them
- □ Request participants complete a W-9
- □ Determine if the participant has consistent internet access, a smartphone with text capability (confirm number by sending a test text), and an e-mail address
- □ Provide individuals with a basic smartphone if they do not have consistent internet access (hardware costs are not included in the SRO budget) and data plan (costs are not included in the SRO budget) for the duration of the study (determination that the participant has an alternative and no longer wishes to use the phone provided by the study after this point of contact will be the responsibility of YCR)
- □ Give participant a pre-loaded bank/debit card with $50 and help them register the card online
- □ Administer baseline survey, programmed by SRO, of approximately 45 minutes in length (in total, we have estimated a two-hour in-home interaction with the participant)
- □ Administer consent and collect the following physical measurements:
- □ Blood pressure
- □ Height and weight

- We assume these procedures will be implemented in the single-county pilot, where SRO interviewers will visit households pre-selected by YCR.
- All participant incentive payments are the responsibility of YCR.
Post Collection Processing:
- SRO will conduct standard data cleaning for the survey datasets administered by SRO interviewers.
- We have not budgeted for coding any open-ended.

Weighting and Estimating:
- SRO will develop survey weights for analysis.

Deliverables:
- SRO will provide daily progress reports on baseline data collection to YCR as well as:
- o A summary of field methods at the end of the baseline data collection
- o A full dataset with all participant contact information for further follow up halfway through the data collection phase, and again at the close of the baseline phase,
The SRO budget does not include:
- Administrative data collection
- Collection of expenditure data from financial institutions

SRO Project Period	04/2018 - 02/2020
Data Col Period	03/2019 - 11/2019
Security Plan	NA

Milestone Dates

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

Other Project Team Members: Kirsten Alscer (SPA), Karin Schneider (Project Lead) , Donnalee Grey-Farquharson (Project Manager) Marsha Skoman (Tech Lead), Jeff Smith (Tech Lead backup), Jim Hagerman (Blaise Programmer), Holly Ackerman (Webtrak Programmer), Chris Greene (Data Manager), Barb Homburg (Production manager), Carlos Macuada (Production Manager), Megan Gomez-Mesquita (Financial Analyst)

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

Report Period	Jan, 2021 (EDCPE)	**Project Phase**	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
Jan 31, 2021

Total Cost to Date (Direct + Indirect):	2,626,878.85
Estimated Cost at Completion (E$AC):	2,626,878.85
Total Budget:	2,615,353.00
Variance (Budget minus E$AC):	-11,525.85
Reason For Variance:	Slight overrun is due to more than expected closeout work associated with phone consents and other data management work.

Projections
Jan 31, 2021

Dollars Projected For Month:	-3,092.06
Actual Dollars Used:	-1,722.24
Variance (Projected minus Actual):	-1,369.82
Reason For Variance:	Overrun due to more than expected closeout work.

Measures

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

Other Measures

Project Name	Every Dollar Counts Semi-Structured Interviews (EDC-Semi Structured)
Project Mode	Primary: Telephone Total of Modes: 1
Project Type	Sponsored Projects

Project Status   Current

Budget	***Direct Budget:***	351,246.00	***InDirect Budget:***	105,374.00	***Total Budget:*** 456,620.00

Principal Investigator/Client	Stephanie Chardoul (SRO) Elizabeth Rhodes (YCR/OpenResearch) Jessica Wiederspan (YCR/OpenResearch)
Funding Agency	
IRB	***HUM#:*** ***Period Of Approval:***
Project Team	***Project Lead:*** Karin Schneider ***Budget Analyst:*** Megan Gomez-Mesquita ***Production Manager:*** Barbara Aghababian-Homburg ***Senior Project Advisor:*** Kirsten Haakan Alcser ***Production Manager:*** ***Production Manager:*** Rebecca Loomis
Proposal #:	no data
Description:	There are two phases of the project. In Phase 1, the PI provides a selected list of respondents from the EDC Main study, SRO contacts and conduct 140 semi-structured interviews with them by phone. In Spring 2021, the second phase will be a re-interview of these same 140 respondents, also by phone;
SRO Project Period	05/2020 - 06/2021
Data Col Period	08/2020 - 05/2021
Security Plan	NA

Milestone Dates

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

Other Project Team Members:	Karin Schneider, Barb Homburg, Becky Loomis, Kasyera Kowalczyk
Other Project Names:	
Sample Mgmt Sys	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, Other (By PI)
Administration	SRO Group
Payment Type	NA
Payment Method	NA

Report Period	Jan, 2021 (EDC-Semi Structured) **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	Aside from clearing up questions on audio tapes of the interviews (esp where there is more than one interview session), we are on pause. We will start planning for Phase2 (re-interviews of the 156 Phase 1 respondents) at the end of this month. Would like to use Zoom is possible (CMT okays it, just have to ensure it would work "on top" of Blaise).
Special Issues	None other than the project pause described above.

Cost
Feb 28, 2021

Total Cost to Date (Direct + Indirect):	223,908.00
Estimated Cost at Completion (E$AC):	387,136.00
Total Budget:	456,620.00
Variance (Budget minus E$AC):	69,484.00
Reason For Variance:	We are no longer projecting any travel as we are sure we will stay on the phone for Phase 2, so large underrun is now showing.

Projections
Feb 28, 2021

Dollars Projected For Month:	18,600.00
Actual Dollars Used:	18,635.00
Variance (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:			

Other Measures

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 Investigator/Client   Kenneth Langa (SRC)
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 Casey
Senior Project Advisor: Evanthia Leissou
Production Manager:
Production Manager:

Proposal #:   no data

Description: Building off the 2016 Harmonized Cognitive Assessment Protocol (SRO #15-0011R01) experience, this project will involve the completion of a face-to-face CAPI interview, designed to provide a dementia assessment of HRS respondents. A sample of 4649 respondents (one per household) who are 65 years of age or older will be selected for this effort. The questionnaire will be administered to respondents after their HRS 2020 interview has been completed. The sample will not be clustered geographically. We propose to staff a team of approximately 32 interviewers. It is expected that this team will carry out well-planned regional trips in order to complete the 3200 in-person interviews. The respondent questionnaire length is expected to be 60 minutes. An informant interview will also be completed for each of the respondents interviewed. The informant questionnaire is expected to be 25 minutes and can be administered by telephone.

SRO Project Period   01/2020 - 12/2021
Data Col Period   07/2020 - 08/2021
Security Plan   NA
Milestone Dates

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

Other Project Team Members: PDMG: Tony Romanowski, Lisa VanHavermaet, Kasyera Kowalczyk. TSG: Jeff Smith, Brad Goodwin, Peter Sparks, Ashwin Dey, Deb Wilson

Other Project Names:

Sample Mgmt Sys   SurveyTrak
Data Col Tool   Blaise 4.8
Hardware   Laptop; [UM cell] Phone
DE Software   NA
QC Recording Tool   NA
Incentive   Yes, R; Yes, INF
Administration   NA
Payment Type   Check, prepaid (50); Check, post (25)
Payment Method   Check through STrak RPay System

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Report Period   Jan, 2021 (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 met with the Ireland team to discuss that SRO will provide video slides with a voiceover, and is currently working on estimating effort so we can provide a budget estimate. 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 in Fall 2021 if this will be possible. 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 do not want to consider 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
Feb 28, 2021

Total Cost to Date (Direct + Indirect):	179,276.18
Estimated Cost at Completion (E$AC):	4,120,813.33
Total Budget:	4,488,000.00
Variance (Budget minus E$AC):	367,181.67
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
Feb 28, 2021

Dollars Projected For Month:	-1,619.84
Actual Dollars Used:	-5,142.20
Variance (Projected minus Actual):	-6,119.39
Reason For Variance:	A staffperson accidentally charged HCAP rather than HRS last month. He has corrected his timesheet and the discrepancy is showing up this month.

Measures

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

Other Measures

Project Name	Health and Retirement Study 2020 (HRS 2020)
Project Mode	Primary: Mixed Secondary: Web Total of Modes: 3
Project Type	Sponsored Projects **Project Status** Current
Budget	***Direct Budget:*** 11,961,346.00 ***InDirect Budget:*** 4,306,085.00 ***Total Budget:*** 16,267,431.00
Principal Investigator/Client	David Weir (ISR-SRC)

Funding Agency		
IRB	***HUM#:*** HUM00061128 ***Period Of Approval:*** 10/3/18-10/2/19	
Project Team	***Project Lead:*** Evanthia Leissou	
	Budget Analyst: Richard Warren Krause	
	Production Manager: Andrea Sims	
	Senior Project Advisor: Nicole G Kirgis	
	Production Manager: Jennifer C Arrieta	
	Production Manager: Rebecca Gatward	

Proposal #: no data

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

SRO Project Period 01/2019 - 08/2021
Data Col Period 03/2020 - 03/2021
Security Plan NA
Milestone Dates

PreProduction Start: 01/01/2019	***Pretest Start:*** 11/11/2019
Pretest End: 11/23/2019	***Recruitment Start:*** 09/01/2019
Staffing Completed: 12/15/2019	***GIT Start:*** 02/17/2020
SS Train Start: 02/19/2020	***SS Train End:*** 02/26/2020
DC Start: 03/02/2020	***DC End:*** 04/03/2021

Other Project Team Members: Derek Dubuque (Production Manager), Sharon Parker (Production Management Coordination), Andrew Hupp (Project Manager), Dan Tomlin (Project Manager), Gary Hein (Project Manager), Leah Roberts (Training Coordinator), Daniah Buageila (Lead Project Assistant), Anna Fuqua-Smith (Project Assistant), Janet McBride (Project Assistant), Paul Burton (Stats/Sampling)

Other Project Names:

Sample Mgmt Sys SurveyTrak; MSMS
Data Col Tool Blaise 5
Hardware Laptop; [UM cell] Phone; Paper and Pencil
DE Software Other (Blaise 5 Coding Application); External vendor (DataForce Scanning SAQs)
QC Recording Tool Camtasia
Incentive Yes, R; Yes, INF
   Administration NA
   Payment Type Check, prepaid (80.00); Check, post ($50); Cash, post (20.00); Other (Money Order (by request))
   Payment Method Check through STrak RPay System; Check through other system (Rpay system set up for MSMS); Interviewer p

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Report Period Jan, 2021 (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.

Production has continued to slow down but interviewers have maintained an average of 21 hours per week ensuring they attempt all workable sample. The overall response rate is 69% (goal 74%). An interviewer bonus with increased respondent token and a shift of cases from field to web strategies were implemented in an effort to increase response rate. Additional sample will be moved from field to web in February as well. A design was discussed with the PIs to implement an endgame experiment starting in February which includes an additional respondent token of $100 or $200 upon completion of the interview.

The team continued to focus on technical development, systems testing, coding, and IRB submissions. The team finished preparations of technical systems and materials for relaunching the SAQ mail protocol mid January. The team continued technical system development for the launch of the SSA mal protocol (schedule moved to mid February). DM13 was released to the field and web.

Measures noted in tables below are as of 2/13 (week 50)

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
Jan 31, 2021

Total Cost to Date (Direct + Indirect):	13,494,317.48
Estimated Cost at Completion (E$AC):	15,547,520.84
Total Budget:	16,267,431.00
Variance (Budget minus E$AC):	719,910.16
Reason For Variance:	The 6 year renewal proposal, which includes 2020, was based on a targeted dollar amount. 2020 original projections (approved by project staff) were based the 2018 response rate and 2018 actuals. Estimated under-run is due to the change in study protocol in response to COVID19 with all of the FTF and enhanced FTFe cases approved for mode change to TEL, stopping interviewer SSA linkage consent, stopping WBD protocol, changing SAQ and SSA to be administered via mail with a phone follow-up, and COVID hours charged to date. Costs for transcription of one COVID question has been added. Overall, the under-run increased to $719,910, an increase of $160,867 from the last cost report. The primary reason is due to the reduction in survey director hours from shifting some to New Cohort. The CASIC rate change has not been added to CRS yet, which will cost an estimated $11K direct on this project.

Projections
Jan 31, 2021

Dollars Projected For Month:	864,698.32
Actual Dollars Used:	603,050.76
Variance (Projected minus Actual):	261,647.56
Reason For Variance:	Total hours were 12% under projections for the month. As we discussed last week, most of this is due to Iwer hours and Data Manager hours being under projections this month. This resulted in a $42K direct cost under-run in salary for January. In January, non-salary costs were under projections by $150K direct primarily due to Rpay, postage, printing and supplies related to SSA/SAQ mailings. These projections have been pushed forward.

Measures

	Units Complete	RR	HPI
Current Goal:	16,312	71%	5.8
Goal at Completion:	17,118*	74%	6.8
Current actual:	15,868	69%	5.8
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
Principal Investigator/Client	Kristine Ajrouch (Life Course Development Program, SRC)
	Toni Antonucchi (Life Course Development Program, SRC)
	Laura Zahodne (Life Course Development Program, SRC)
Funding Agency	
IRB	*HUM#:* HUM00146040 *Period Of Approval:* 4/9/2020
Project Team	*Project Lead:* Juan Carlos Donoso
	Budget Analyst: Parina Kamdar
	Production Manager: Theresa Camelo
	Senior Project Advisor: Kirsten Haakan Alcser
	Production Manager: Ian Ogden
	Production Manager: Ian Ogden
Proposal #:	no data
Description:	Conduct 600 interviews with recently identified Arab Americans aged 65 or older residing in Southeast Michigan and 330 interviews with Social Relations sample members aged 65 or older. The Arab American sample will be selected based on an in-person household screening. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements. Social Relations respondents will only complete the cognitive interview. An informant interview will also be conducted for all sample members. Interviews will be conducted in English or Arabic. A pretest will be conducted in August 2019 with main data collection occurring from November 2019 through July 2020.
SRO Project Period	05/2019 - 08/2020
Data Col Period	11/2019 - 07/2020
Security Plan	No

Milestone Dates

PreProduction Start:	05/01/2019	*Pretest Start:*	11/12/2019
Pretest End:	12/13/2019	*Recruitment Start:*	08/15/2019
Staffing Completed:	03/01/2021	*GIT Start:*	
SS Train Start:		*SS Train End:*	
DC Start:	04/01/2021	*DC End:*	11/30/2021

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

Report Period	Jan, 2021 (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 projectd overrun including the following explanation:
The reasons for the increase in the projected direct cost overrun are explained below:

1.- Programming hours:

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

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

2.- Salary costs:

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

3.- COVID Bank hours:

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

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

Cost
Jan 31, 2021

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.

Projections
Jan 31, 2021

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

Measures

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

Other Measures

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

Project Status Current

Budget	***Direct Budget:***	9,806,418.00	***InDirect Budget:***	2,236,640.00	***Total Budget:*** 12,043,058.00

Principal Investigator/Client	Sandra Newman (Johns Hopkins University) Tama Leventhal (Tufts University)
Funding Agency	NICHD, HUD, RWJ Foundation, MacArthur Foundation
IRB	***HUM#:*** HUM00114794 ***Period Of Approval:***

Project Team

Project Lead:	Barbara Lohr Ward
Budget Analyst:	Parina Kamdar
Production Manager:	Veronica Connors-Burge
Senior Project Advisor:	Grant D Benson
Production Manager:	Becky Kay Scherr
Production Manager:	Carlos Andres Macuada Lopez

Proposal #:   no data

Description:

Low-income parents face serious constraints when they seek housing, and these constraints may undermine their childrens' development. In many cases, low-income parents will face tradeoffs between dwelling unit quality, neighborhood quality, and school quality. This project has four main aims: (1) to learn how parents negotiate these tradeoffs and make choices about where to live; (2) to assess how features of the child's social contexts--home, neighborhood, and school-- combine to influence key cognitive socio-emotional and health outcomes among parents and their children; (3) to examine how the quality of housing affects parenting practices and outcomes for children and their caregivers; and (4) to enhance the study of child development through theoretical and methodological advances in the study of housing and the other social contexts related to housing.

The project proposes to conduct two waves of data collection, separated by about 12 months, with families in Seattle, Dallas and Cleveland. In-person interviews will be completed with ~ 1686 parents and 2328 children aged 3-10 (at Wave 1). One-half of the sample will be an experimental sample consisting of applicants for a federal housing voucher. This experiment sample will include both voucher winners (treatment group) and voucher losers (control group). The other half of the sample will be generated through a random selection and screening process in census blocks that vary by household income weighted toward lower-income blocks. Each interview with an adult will last about 90 minutes, and will include the collection of anthropometric measures from all sample persons (including children), administration of Woodcock-Johnson tests to children. Adult Voucher sample participants will be asked for three blood pressure measurements, and blood spots will be collected from Voucher sample adults and children. The data collection also includes collecting laser tape measurement of all rooms in a household, 8 block face neighborhood observations, a four-day leave-behind child time diary, and post-interview observations.

SRO Project Period	04/2016 - 02/2020
Data Col Period	05/2017 - 09/2018
Security Plan	NA

Milestone Dates

PreProduction Start:	09/01/2018	***Pretest Start:***	
Pretest End:		***Recruitment Start:***	09/01/2019
Staffing Completed:	03/01/2020	***GIT Start:***	
SS Train Start:	08/18/2020	***SS Train End:***	08/21/2020
DC Start:	08/24/2020	***DC End:***	02/06/2021

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

Report Period	Jan, 2021 (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.
- Developed ballpark cost estimate for extending interviewing for one week.
- Monitored subcontracts, project invoicing and payments.
- Prepared and delivered weekly production reports.
- Managed production activities necessary to support field interviewing and Social Security form data collection:
o Revised and updated the mail schedule for respondent end-game mailings and the Social Security for data collection effort.
o Ordered printing for new documents approved by IRB (letters, project newsletter, materials for Social Security form data collection)
o Kitted and executed mailings for announcement of coverscreen incentive, newsletter, and Social Security form kits.
o Logged and scanned incoming Social Security forms.
o Managed respondent payments
□ Mailed respondent incentives; reconciled cash/gift card funds.
□ Received and logged undelivered incentives; contacted respondents and re-mailed incentives
□ Requested new imprest cash funds and gift cards.
o Updated sample management system with address updates received from respondents.
o Assembled and mail interviewer packets for SSN-form training.
- Tested the sample management system updates to incorporate the coverscreen incentive.
- Specified and tested a sample management system for Social Security form reminder calling. Specified and tested reports.
- Final Deliverables
o Drafted a plan for finalizing sample lines, including assigning codes to unworked sample lines.
o Drafted a plan for preparing final data files for delivery.
o Drafted an outline for the final project report.
o Began review of datafiles (see Final Data Deliverables for more detail)

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.
- Provided input on sample close-out proposal.
- Participated in discussions regarding development of sample weights.

Task 3: Questionnaire Development
% Task Spent to Date
- No activity this month

Task 4: CAI Programming
% Task Spent to Date
- Attended technical team meetings; provided input on study progress
- Began updating questionnaire documentation to correct variable names, document various Blaise data-model releases

Task 5: Systems Programming
% Task Spent to date
- Completed modification of field sample management system application (Surveytrak) to include Coverscreen

incentive. Tested and fixed bugs in system prior to release.
• Programmed reports for the logging system that provide information about Social Security form correction mailings and returns.
Specified a sample management system to manage reminder calling for the Social Security form data collection.
Specified and programmed various reports for the system.

Tasks 6, 7: Interviewer Recruitment & Hiring, Training
% Task Spent to Date
• Prepared and delivered two training sessions for SSA follow-up effort covering study content and technical systems

Task 8: Main Data Collection
% Task Spent to Date
• Telephone data collection:
o Production interviewing continued during the month of January 2021. As of February 1st (reflecting production through January 31st):
o 1487 Coverscreens completed
o 1391 PCG interviews completed
 28 non-intact households
o Interviewers and dedicated locators conducted respondent locating on hard-to-reach lines.
o Conducted interviewer performance evaluations.
o Logged and responded to incoming email and phone requests for interviews.
o Logged returned mail; updated addresses and re-mailed letters where necessary.
o Mailed letters:
 Letters for the Coverscreen token with newsletter
 End game letters for cases where Coverscreen has been completed but PCG not finalized, with newsletter
 Concerns letters as requested by the field team.
o Verification
 Reviewed incoming verification forms to remove duplicates
 Logged received forms
• Conducted telephone interviewer debriefing
o Assembled and shipped interviewer packets for debriefing
o Planned and conducted an internal interviewer debriefing, collecting information on sample management and reporting systems, data collection protocols, and the questionnaires.
o Developed agenda for debriefing with research team.
• Managed respondent payments
o Requested gift card funds.
o Mailed tokens of appreciation for completed PCG interviews.
o Mailed tokens of appreciation for returned SSN forms.
o Reconciled shipped gift cards and closed funds as necessary.
• SSN/Records-matching mailings
o Kitted and shipped materials for records-matching reminder mailing. Logged tracking numbers for each kit.
 First mailing for cohort 2
 Third mailing for cohort 1
o Reviewed incoming social security forms to identify those in need of remediation. Mailed forms for correction along with notated checklist. Logged tracking numbers.
o Rescanned all received SSN forms to comply with revised specifications from research team received in early January
o Began reminder/assistance calling effort to Cohort 1 respondents SSN/Records-matching mailings (n=350)

Task 9: Post Collection Processing
% Task Spent to Date
• Began reviewing open-ended responses and interview remarks.
o Checked all remarks against the sample management system to ensure that address and name updates were carried forward in the sample management system.
o Created a file to record preload updates (respondent name spelling changes, date-of-birth/age updates, gender changes, etc.)
o Created a file to edit open-ended remarks to remove PII as necessary.

Task 10: Weighting
% Task Spent to Date
• See Task 2 Sampling for other activities

Task 11: Final Data Deliverables
% Task Spent to Date
• Prepared and delivered geocodes weekly
• Scanned and delivered SSN forms and related documentation
• See Task 1 Management for other activities

Special Issues

Areas of Concern (changes shown in italics):

Wave 2

• The delay in shipment of Business Reply Mail for the Social Security form mailing, and subequent billing from USPS may impact the timing of receipt of final charges for incoming Business Replay Mail.

• The project is projecting an underrun estimated between $35,000 and $75,000 in direct costs. The exact figure depends on the response rate to our social security form data collection effort, and the level of effort necessary to support that data collection. 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.

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

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

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

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

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

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

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

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

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

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

Wave 2 Work Scope Changes:

• Notification of new specifications for State Data Consent forms received on February 9th, 2020, 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.

• Remediation will be attempted 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.

• Telephone data collection will be extended through February 6, 2021.

• Reminder/assistance calling will be conducted for all households receiving a request for SSN-form completion.

Cost
Feb 16, 2021

Total Cost to Date (Direct + Indirect):	11,330,892.04
Estimated Cost at Completion (E$AC):	11,989,983.61
Total Budget:	12,043,058.00
Variance (Budget minus E$AC):	53,074.39
Reason For Variance:	NICHD authorized additional funding to cover an extension of data collection and panel maintenance post-data collection.

Projections
Feb 16, 2021

Dollars Projected For Month:	300,587.41
Actual Dollars Used:	299,451.03
Variance (Projected minus Actual):	1,136.38
Reason For Variance:	Nominal variance in billings of several categories

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	
Current actual:	1391	78%	8.7
Estimate at Complete:			
Variance:			

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

Project Name	HRS 2020 COVID Antibody Test (HRS 2020 ABT)
Project Mode	Primary: Mail Total of Modes: 1

Project Type	Sponsored Projects	**Project Status**	Current

Budget	***Direct Budget:*** 601,330.00	***InDirect Budget:*** 216,479.00	***Total Budget:*** 817,809.00

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

Funding Agency NIH

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

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

Proposal #: no data

Description: The HRS 2020 COVID Antibody Study is a supplement to the HRS to accurately assess who has been exposed and infected with SARS-CoV-2. Antibody testing for the novel coronavirus that causes COVID-19 will provide an indication of the characteristics of people who were infected in this national sample. It is important to understand how the relative size of these groups differs by race/ethnicity, socioeconomic status, work status, education and geography in order to add to our understanding of who was infected with the coronavirus, as well as those who went on to have symptoms and develop COVID-19 during the pandemic progression. Saliva collection kits will be mailed to approximately 17.600 respondents homes. The consent document will detail the purpose of the study and what is being requested of them. The consent includes two questions - if the respondent ever received a positive COVID test result and the date of that test. The collection will be administered in both English and Spanish. The sample will consist of all HRS 2020 sample members who do not reside in a nursing home. The field period, mailings and reminder calling, is expected to occur between October 15, 2020 and March 31, 2021 before a vaccine is widely available. We expect 65% of the sample to consent to this collection. This project is being conducted in collaboration with the ISR Biospecimen lab.

SRO Project Period 09/2020 - 04/2021
Data Col Period 10/2020 - 03/2021
Security Plan NA
Milestone Dates

PreProduction Start:	09/01/2020	***Pretest Start:***	10/09/2020
Pretest End:	10/15/2020	***Recruitment Start:***	09/22/2020
Staffing Completed:	01/15/2021	***GIT Start:***	
SS Train Start:	01/25/2021	***SS Train End:***	
DC Start:	10/19/2020	***DC End:***	03/31/2021

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

Other Project Names: HRS Antibody, Antibody Project

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

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Report Period	Jan, 2021 (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.

MSMS data collector application and protocol rules were updated for the reminder calling effort. Webinar training was conducted with field and SSL staff on 1/25/21 and 2/8/21. The reminder calling staff consists of 32 interviewers from the SSL and field. Reminder calling began with 2,317 respondents on 1/27/21. Project staff will monitor the progress in first couple of weeks to assess if they will add additional sample to the reminder calling effort.

Minnesota had not reported samples received for almost 2,000 respondents which was discovered when we received the first results file in January where we had results for respondents but no indicator from the lab that they ever received a sample. In addition, we have continued to experience a delay in receiving test results from the Minnesota lab due to resource issues. Only 2,836 results (Negative and Non-Analyzable) were received by end of January. Given the volume of calls and emails we are receiving from respondents asking for their test results, we requested from the PIs to again intervene and find a solution. Results are now being delivered on a weekly basis but in small numbers compared to the number of samples received. Positive results are still being re-analyzed by the lab and are estimated to be delivered to SRO starting mid to late February.

As of 1/27/21 the overall response rate was at 38% (see details below)
Original sample selected=17,639
Sample removed from kit mailing = 1,352
Total Sample Sent A Kit = 16,287
  Samples received by MN: 6,241 (38%)
  Refusals: 1,113 (7%)
  Deceased: 77 (0.5%)
  Undeliverable - No Forwarding Address: 76 (0.5%)
  Pending response: 8,780 (54%)

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.
Respondent contacts to SRO often very upset due to delay in receiving results.

Cost
Jan 31, 2021

Total Cost to Date (Direct + Indirect):	717,513.12
Estimated Cost at Completion (E$AC):	813,473.59
Total Budget:	817,809.00
Variance (Budget minus E$AC):	4,335.41
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. Reminder calling workscope has been added to the projections.

Projections
Jan 31, 2021

Dollars Projected For Month:	65,085.48
Actual Dollars Used:	52,832.87
Variance (Projected minus Actual):	12,252.61
Reason For Variance:	The variance is primarily due to postage. Minnesota has only delivered results for 2,836 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:	6,241	38%	
Estimate at Complete:	6,515	40%	
Variance:	4,072	25%	

Other Measures

Project Name	India Human Development Survey Wave 3 (IHDS3)	
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 2	
Project Type	Sponsored Projects	**Project Status** Current
Budget	***Direct Budget:*** 333,895.61 ***InDirect Budget:*** 198,006.92 ***Total Budget:*** 531,902.53	

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

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

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

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

Proposal #: no data

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

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

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

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

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

HelpDesk Team
Genise Pattullo
Emmanuel Ellis
Andrea Pierce

Data Manager Team
Jonathan Harrison
Matthew Scibiorski

DBA Team
LihShwu Ke
Cheng Zhou

Other Project Names:

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

Report Period	Jan, 2021 (IHDS3)	**Project Phase**	Implementing

Risk Level   *On Track*

Monthly Update

On January the team met together again with the Client to set goals to prepare for the upcoming restarts of DMAS and the start of IHDS3. The focus was to compile and review the to-do items with the team and plan for ramping up in the coming months.

Special Issues

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

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

● SRO staffing - this is the largest and one of the most complex projects and there is concern about having enough staff to fully support the project and we lost a data manager a few months ago and now have recently lost our data manager again.
○ Mitigation:
■ We now have a data manager team (Laura Yoder, Cheng Zhou and Sarah Broumand) and trying hard to catch up and complete all the required tasks
■ The Field User Management tool was develop to give the NCAER staff more responsibilities for certain data management tasks
■ Continue to working closely with NCAER to keep the timeline on track to avoid unnecessary rework

Cost
Jan 31, 2021

Total Cost to Date (Direct + Indirect):	487,294.82
Estimated Cost at Completion (E$AC):	511,133.35
Total Budget:	531,902.53
Variance (Budget minus E$AC):	246,751.18
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:	765.92
Actual Dollars Used:	369.74
Variance (Projected minus Actual):	396.18
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:			

Other Measures

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

Project Status   Current

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

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

Funding Agency   Health and Retirement Study

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

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

Proposal #:   no data

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

SRO Project Period   01/2020 - 05/2021
Data Col Period   09/2020 - 04/2021
Security Plan   NA
Milestone Dates

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

Other Project Team Members:
Jay Lin   Technical Lead
Gina Cheung   Technical Advisor
Peter Sparks   Blaise Programmer
Holly Ackerman   WebTrak Programmer
John Gawlas   HelpDesk Specialist
Genise Pattulo   HelpDesk Supervisor
Cheng Zhou   Database Administrator
LihShwu Ke   Database Administrator
Marsha Skoman   SurveyTrak Intl Programmer
Ashwin Dey   SurveyTrak Offline
Brad Goodwin   Data Manager
Emmanuel Ellis   HelpDesk Specialist (back up)

Other Project Names:

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

Report Period	Jan, 2021 (MARS 2)	**Project Phase**	Implementing

Risk Level *On Track*

Monthly Update Production, largely via telephone, continues slowly due to limitations of the pandemic. A few programming changes are being made to update the Chinese instrument and add a few soft checks to help IWRs. Data collection has been extended to the end of the summer as a result and this is being added to the projections and will still maintain an underrun.

Special Issues

Cost
Feb 28, 2021

Total Cost to Date (Direct + Indirect):	166,775.46
Estimated Cost at Completion (E$AC):	242,629.77
Total Budget:	254,702.00
Variance (Budget minus E$AC):	12,072.23
Reason For Variance:	No international travel

Projections
Feb 28, 2021

Dollars Projected For Month:	7,856.24
Actual Dollars Used:	5,468.13
Variance (Projected minus Actual):	2,388.11
Reason For Variance:	programmer hours were not used, pushed forward to Feb

Measures

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

Other Measures

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

Project Status   Current

Budget	***Direct Budget:*** 643,762.00 ***InDirect Budget:*** 0.00 ***Total Budget:*** 643,762.00
Principal Investigator/Client	Paul Courant (Gerald R Ford School of Public Policy) Kevin Stange (Gerald R Ford School of Public Policy) Susan Jekielek (ICPSR)
Funding Agency	
IRB	***HUM#:*** 00173324 ***Period Of Approval:*** 10/2020-10/2021
Project Team	***Project Lead:*** Maureen Joan O'Brien ***Budget Analyst:*** Carl S Remmert ***Production Manager:*** Lisa J Carn ***Senior Project Advisor:*** Nicole G Kirgis ***Production Manager:*** James Koopman ***Production Manager:***
Proposal #:	no data
Description:	TBD

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

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

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Report Period	Jan, 2021 (CBII) **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	Letter invitations for the web survey were mailed on Friday, Feb 5, and email invitations were sent Tuesday, Feb 9. The first email reminder will be sent this Thursday, Feb 18. There was an issue with the userid load into Illume, in which 4,150 of the 15,000 userid's were changed when a column was moved in Excel. This resulted in the inability for this sample to access their survey if they attempted. The issue was identified 4 hours after the first survey was completed, on the 2nd mailing day after the letters were mailed. The survey was down for 30 minutes as the problem was corrected. It is very unlikely that many cases attempted to access the survey during this time. SRO documented the issue for the pl's and is currently writing the data QC plan for them as well. Manual Locator Training was on Tuesday, 2/2 for 2 field locators. Reminder Calling Training will be held this Thursday, Feb 18. There will be 6 SSL Iwers, and 3 Field Iwer. Locators will be attending as well. 2 of the 9 reminder callers (Iwers) are TL's. Coding training will be held within the next couple of weeks. Systems are completely developed (Blaise SMS, Illume). Reports are being finalized and should be ready by next week.

Special Issues

Cost
Feb 28, 2021

Total Cost to Date (Direct + Indirect):	64,904.70
Estimated Cost at Completion (E$AC):	643,484.67
Total Budget:	643,762.00
Variance (Budget minus E$AC):	277.33
Reason For Variance:	In process of working through projections with Budget Analyst and 2nd BA who is assisting.

Projections
Feb 28, 2021

Dollars Projected For Month:	59,727.73
Actual Dollars Used:	41,786.21
Variance (Projected minus Actual):	17,941.52
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:	3000	20%	
Current actual:			
Estimate at Complete:			
Variance:			

Other Measures

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

Project Type	Sponsored Projects			**Project Status**	Current
Budget	***Direct Budget:*** 4,701,300.00	***InDirect Budget:*** 2,615,631.00		***Total Budget:*** 7,316,931.00	

Principal Investigator/Client	Richard Miech (Survey Research Center)
Funding Agency	

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

Project Team
- ***Project Lead:***   Rebecca Gatward
- ***Budget Analyst:***   Mary Johnson
- ***Production Manager:*** Margaret Lavanger
- ***Senior Project Advisor:*** Gregg Peterson
- ***Production Manager:***
- ***Production Manager:***

Proposal #:	no data
Description:	The Monitoring the Future study is an epidemiological and etiological research project begun in 1975. The project functions as a basic research study, as well as one of the nation's major sources of reliable information on trends in smoking, drinking and drug use.

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

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

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

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

- -

Report Period	Jan, 2021 (MTF base year 2017-2022)	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update	January

- the team focused on making updates to and then testing and finalising technical systems in addition to making adjustments to protocols and creating training materials.

- The FR and TL training (they were trained together) was split across two sessions. It was necessary to completely revise the format and content of the training this year due to the move to remote school administrations. All the IWERs have MTF experience so we focused on the differences in the protocol
- We also held four virtual HOPs sessions - two in the week after each part of the trainings.

Special Issues

Cost
Feb 12, 2021

Total Cost to Date (Direct + Indirect):	5,181,673.75
Estimated Cost at Completion (E$AC):	7,286,987.24
Total Budget:	7,316,931.00
Variance (Budget minus E$AC):	29,943.76
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 January Client cost report will be uploaded (in MPR).

Projections
Feb 12, 2021

Dollars Projected For Month:	115,061.00
Actual Dollars Used:	79,838.00
Variance (Projected minus Actual):	35,223.00
Reason For Variance:	The variance is spread across salary and non-salary costs. Hours for interviewing were lower than projected - I had projected more time would be needed for data collection activities (in addition to training) in January - these hours have been 'rolled' forward.

Measures

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

Other Measures

Project Name	Monitoring the Future Panel (web) 2021 (MTF Panel (main data collection) 2021)
Project Mode	Primary: Web Total of Modes: 1
Project Type	Sponsored Projects

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

Principal Investigator/Client	John Schulenberg (UM-SRC)

Funding Agency

IRB	***HUM#:***	HUM-0013R02	***Period Of Approval:***	In continuing Review	
Project Team	***Project Lead:***		Donnalee Ann Grey-Farquharson		
	Budget Analyst:		Mary Johnson		
	Production Manager:				
	Senior Project Advisor:		Gregg Peterson		
	Production Manager:		Rebecca Gatward		
	Production Manager:				

Proposal #:	no data
Description:	This project is a continuation of MTF Illume Web 2020. The new budget has been combined with previous to allow for "additional funding" of the continuing portion and includes some development/programming work for 2021.
	PI staff will edit and test 12 survey versions, all previously programmed in Illume by SRO. SRO will further test the surveys as part of the systems integration process. All 12 surveys will be launched in 2021. After testing is complete, SRO will launch the 2021 Web survey data collection with an estimated sample size of 20,000 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 2021 with the data collection taking place during a 7-month period, beginning April of 2021. The total cost for this work is estimated at $355,783 ($228,066 direct, $127,717 indirect), budgeted at the currently negotiated on-campus recovery rate of 56%.
SRO Project Period	01/2021 - 12/2021
Data Col Period	04/2021 - 10/2021
Security Plan	NA

Milestone Dates

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

Other Project Team Members:	Gregg Peterson (SPA), Rebecca Gatward (Director), Donnalee Grey-Farquharson, Hueichun Peng, Lloyd Hemingway, Shaowei Sun, Minako Edgar, Peter Sparks, Ashwin Dey, Hongyu Johnson
Other Project Names:	MTF Illume Web 2021
Sample Mgmt Sys	Web SMS; Project specific system (RLM, RIMS)
Data Col Tool	Illume
Hardware	NA
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, Other (Managed by SRC PI Staff)
Administration	N/A
Payment Type	N/A
Payment Method	N/A

Report Period	Jan, 2021 (MTF Panel (main data collec	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update

PI staff have edited the first 6 forms. Programming for Web SMS updates has started. Email templates are being edited and integration testing plan developed.

Special Issues

Cost
Jan 31, 2021

Total Cost to Date (Direct + Indirect):	804,409.02
Estimated Cost at Completion (E$AC):	1,148,123.03
Total Budget:	943,599.00
Variance (Budget minus E$AC):	-204,524.03
Reason For Variance:	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. This should be taken care of before the end of February.

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
Jan 31, 2021

Dollars Projected For Month:	27,700.77
Actual Dollars Used:	25,190.56
Variance (Projected minus Actual):	2,510.21
Reason For Variance:	Some programming work delayed to February.

Measures

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

Other Measures

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

Proposal #:   no data

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

SRO Project Period	03/2019 - 07/2020
Data Col Period	05/2019 - 07/2019
Security Plan	NA
Milestone Dates	

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

Other Project Team Members:	Hueichun Peng
Other Project Names:	
Sample Mgmt Sys	Web SMS
Data Col Tool	Illume
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, R
Administration	NA
Payment Type	Check, prepaid ($25)
Payment Method	Check through other system (handled by Study Staff)

Report Period	Jan, 2021 (MTF HID)

Project Phase   Implementing

Risk Level   *On Track*

Monthly Update   In January we completed the 2nd round of testing. This round was abbreviated since the changes from the first round of testing were very minor. Additionally, we sent the client the data file from the test cases to ensure that they would be receiving the data in the correct format. This was checked and all is in order. A request from the client has us moving our scheduled data collection out 1 week, so instead of letters being mailed on Feb 12, they are now being mailed on Feb 19. Email Invitation will now be sent on Monday, February 22. All continues to go well on this project.

Special Issues

Cost
Feb 08, 2021

Total Cost to Date (Direct + Indirect):	192,929.30
Estimated Cost at Completion (E$AC):	342,832.74
Total Budget:	468,982.00
Variance (Budget minus E$AC):	126,149.26
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
Feb 08, 2021

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

Measures

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

Other Measures

Project Name	National Campus Climate Survey (NCCS 2021)
Project Mode	Primary: Telephone
Project Type	Sponsored Projects

Project Status   Current

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

Principal Investigator/Client	William Axinn (University of Michigan)

Funding Agency

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

Project Team	*Project Lead:*	Sharon K Parker
	Budget Analyst:	
	Production Manager:	
	Senior Project Advisor:	
	Production Manager:	
	Production Manager:	

Proposal #:	no data
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	01/2021 - 01/2021
Data Col Period	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 End:*	01/25/2021

Other Project Team Members:	
Other Project Names:	
Sample Mgmt Sys	Project specific system (SoundRocket SMS); Other (Workzone/Exel)
Data Col Tool	Other (SoundRocket SMS)
Hardware	Laptop; [UM cell] Phone
DE Software	NA
QC Recording Tool	NA
Incentive	Not used
Administration	N/A
Payment Type	N/A
Payment Method	N/A

- -

Report Period	Jan, 2021 (NCCS 2021)	**Project Phase**	Closing
Risk Level	*On Track*		
Monthly Update	Data collection has been completed and we are waiting for a cost report.		
Special Issues			

Cost
Feb 28, 2021

Total Cost to Date (Direct + Indirect):	6,000.00
Estimated Cost at Completion (E$AC):	6,000.00
Total Budget:	6,036.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	All costs are estimates waiting for a final cost report.

Projections
Feb 28, 2021

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	All costs are estimates waiting for a final cost report.

Measures

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

Other Measures

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 Investigator/Client	David Johnson (UM) Katherine McGonagle (UM) Narayan Sastry (UM)
Funding Agency	NSF, NIA, NICHD, The Office of the Assistant Secretary for Planning and Evaluation of the United States, DHHS, The Econom
IRB	***HUM#:*** HUM00062417 ***Period Of Approval:*** 8/20/2020 - 8/19/202
Project Team	***Project Lead:*** Shonda R Kruger-Ndiaye ***Budget Analyst:*** Megan Gomez-Mesquita ***Production Manager:*** Stacy Quisenberry ***Senior Project Advisor:*** Stephanie A Chardoul ***Production 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	04/2020 - 04/2022
Data Col Period	03/2001 - 10/2021
Security Plan	NA

Milestone Dates

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: 02/24/2021	***SS Train End:*** 03/05/2021
DC Start: 03/08/2021	***DC End:*** 12/31/2021

Other Project Team Members:	
Other Project Names:	Family Economics Study 2021, PSID Core 2021
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)

Report Period	Jan, 2021 (PSID21)	**Project Phase**	Planning

Risk Level *Some Concerns*

Monthly Update January work focused heavily on technical systems development and training planning.

Work on Concurrent Offline continued, with testing, issue identification, and issue resolution. As of the writing of this report 2/19 6 scenarios still require data pull programming.

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.

The project training team continued with plans to develop home study, asynchronous, and synchronous training content featuring videos, written material, exercises, etc. On 1/27 the PIs approved SRO's recommendation to delay production by 1 week (launch March 8) and elongate training to put only PSID Concepts and Blaise practice in week 1 and hold MSMS and 68-ID training content to week 2.

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
Jan 31, 2021

Total Cost to Date (Direct + Indirect):	774,294.10
Estimated Cost at Completion (E$AC):	6,918,348.47
Total Budget:	6,842,175.00
Variance (Budget minus E$AC):	-1,280.47
Reason For Variance:	Projected costs now slightly exceed budget. The projected direct cost overrun is just $3.5K. This does not yet include the $46K direct cost CASIC recharge increase. We've requested some additional info from Ryan before announcing the CASIC increase to PIs and updating projections.

Projections
Jan 31, 2021

Dollars Projected For Month:	183,094.87
Actual Dollars Used:	161,721.44
Variance (Projected minus Actual):	21,373.43
Reason For Variance:	There were underruns in salary across several sub-units. The biggest variance was in TSG. The monthly underrun was more than made up for by projection increases.

Measures

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

Other Measures

Project Name	PSID Child Development Supplement V (2019) (CDS-19)
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	***Direct Budget:*** 5,801,561.00 ***InDirect Budget:*** 3,164,398.00 ***Total Budget:*** 8,965,959.00
Principal Investigator/Client	Narayan Sastry (SRC) Paula Fomby (SRC)
Funding Agency	NICHD, Robert Wood Johnson Foundation
IRB	***HUM#:*** HUM00166316 ***Period Of Approval:*** 6/11/18 - 8/4/2021
Project Team	***Project Lead:*** Rachel Anne Orlowski ***Budget Analyst:*** Megan Gomez-Mesquita ***Production Manager:*** Dianne G Casey ***Senior Project Advisor:*** Stephanie A Chardoul ***Production Manager:*** ***Production Manager:***
Proposal #:	no data
Description:	A 2019 wave of the Childhood Development Supplement (CDS) is planned for September 2019 – May 2020. The sample for CDS is comprised of the PSID-eligible children (ages 0 -17) from the Core 2019 families we interview and their primary caregivers. Approximately 3,700 families will be included, with some Core families containing several CDS children. As part of the CDS, families are asked to complete multiple interviews (i.e., coverscreen, PCG interview, Child interview--including an IVR component) and data collections (i.e., physical measurements, educational assessments, saliva collection, time diaries, school and birth record linkage forms), several of which are completed in-person. CDS interviewing will be conducted by Field interviewers, with the SSL supporting follow-up efforts. SurveyTrak and Blaise 4.8 will be the primary technical systems employed.
SRO Project Period	09/2018 - 02/2021
Data Col Period	09/2019 - 12/2020
Security Plan	NA

Milestone Dates

PreProduction Start:	01/07/2019	***Pretest Start:***	07/15/2019
Pretest End:	08/04/2019	***Recruitment Start:***	05/02/2019
Staffing Completed:	08/05/2019	***GIT Start:***	09/16/2019
SS Train Start:	09/18/2019	***SS Train End:***	09/23/2019
DC Start:	10/01/2019	***DC End:***	12/31/2020

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
Administration	ISR Group (PSID)
Payment Type	Check, post; Cash, post
Payment Method	Check through other system (PSID-RAPS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (PS

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Report Period	Jan, 2021 (CDS-19) **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	Last Component Mailing sent out on 1/4. On-going follow up mailings. On-going logging of returned materials. On-going time diary coding and entry. COVID IWERs closed out in early January. Time Diary Reminder Administration Effort ended on 1/16 -- 39 sets of TDs were completed over the phone. Last Day of follow up reminder effort was 1/31. IRB amendment to collect PCG/Child Saliva Consent via electronic signature for those from whom we received saliva

samples, but do not have a valid consent, submitted 1/15.

Field TLs assisting with finalizing PCG lines by coding out Blaise blocks. Ann Arbor staff fixing Blaise data concerns, reviewing potential partials for PI approval, and creating protocols for finalizing outstanding Blaise blocks.

DMSS is preparing analysis data sets per PI request.

Working on CDS21 resubmission proposal.

Special Issues	Projecting overrun - PIs kept informed.

Cost
Jan 31, 2021

Total Cost to Date (Direct + Indirect):		8,857,260.66
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 decreased from 70K to 21K due to decreasing survey tech hours for Time Diary Coding & Entry. Received significantly fewer diaries than expected, and do not anticipate receiving many more.

Projections
Jan 31, 2021

Dollars Projected For Month:		167,226.93
Actual Dollars Used:		127,690.35
Variance (Projected minus Actual):		39,536.58
Reason For Variance:		Have received fewer Time Diaries than estimated. Decreased ST hours accordingly.

Measures

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

Other Measures

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

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

Principal Investigator/Client	Zeina Mneimneh (University of Michigan) Salma Mawfek Khaled (Qatar University)
Funding Agency	Cambridgeshire and Peterborough NHS Foundation Trust
IRB	*HUM#:* *Period Of Approval:*

Project Team

Project Lead:	Sarah Elisa Broumand
Budget Analyst:	Carl S Remmert
Production Manager:	
Senior Project Advisor:	Gina-Qian Yang Cheung
Production Manager:	
Production Manager:	

Proposal #:   no data

Description: SRC joins Social & Economic Survey Research Institute at Qatar University for the upcoming World Mental Health Study in Qatar to conduct CIDI train-the-trainer training and build a quality assurance tool. The timing expectation is that SRC has an initial working version of the QC tool in time for a January 2020 data collection pilot, then refinements will be made for an October 2020 production launch. The Qatar team will be using the standard CIDI questionnaire instrument (Blaise 5), and they have Blaise programming expertise and their own sample management system. SRC had originally envisioned this as a version of our OLAP Cube, but have since moved away from that and toward a more "ODS"-type approach. SRC scope of work includes CIDI training, methodological designs for in-person and phone call verification, quality control indicators/interventions, and technical designs for quality assurance infrastructure and dashboard, etc.

SRO Project Period	04/2019 - 10/2021
Data Col Period	01/2020 - 10/2021
Security Plan	NA

Milestone Dates

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

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

Report Period	Jan, 2021 (WMH-Qatar)	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update   SESRI starts CATI production on 1/20/21. The SESRI team has several outstanding files and information due to the SRC so that the production QC indicators can be refined for production. SESRI indicated they would be sending the files and information by 1/25/21. The SRC management team has changed the weekly meetings with the client to bi-weekly meetings starting on 1/27/21.

Special Issues   None

Cost
Jan 31, 2021

Total Cost to Date (Direct + Indirect):	59,141.54
Estimated Cost at Completion (E$AC):	64,601.05
Total Budget:	74,928.00
Variance (Budget minus E$AC):	10,326.95
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
Jan 31, 2021

Dollars Projected For Month:	1,613.51
Actual Dollars Used:	1,530.72
Variance (Projected minus Actual):	82.79
Reason For Variance:	Some of time was not consumed because client was busy launching a new pilot that became necessary due to the COVID19 pandemic. As a result, they had to create a pilot for phone interviewing rather than FTF.

Measures

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

Other Measures

Project Name	Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study (STARRS-LS Waves 3 & 4)
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 8,210,436.00 **InDirect Budget:** 4,597,851.00 **Total Budget:** 12,808,287.00
Principal Investigator/Client	James Wagner (University of Michigan) Robert Ursano (Uniformed Services University of the Health Scienc) Murray Stein (University of California San Diego)
Funding Agency	Department of Defense
IRB	**HUM#:** HUM00180765 **Period Of Approval:** 6/3/2020 - 6/2/2021
Project Team	**Project Lead:** Meredith A House **Budget Analyst:** William Lokers **Production Manager:** Ruth B Philippou **Senior Project Advisor:** Lisa S Holland **Production Manager:** Juan Carlos Donoso **Production Manager:** Lisa M Lewandowski-Romps
Proposal #:	no data
Description:	This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025. For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data. To date, we have completed 2 waves of STARRS-LS interviewing. During Wave 1, we attempted to contact 50,000 individuals and completed approximately 14,500 full interviews. All Wave 1 participants that completed a full Wave 1 interview were asked to participate in Wave 2. Waves 3 and 4, which are covered in this application, will include the full STARRS-LS Wave 2 sample, regardless of whether they completed the interview. In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys).
SRO Project Period	05/2020 - 04/2025
Data Col Period	11/2020 - 10/2024
Security Plan	Yes

Milestone Dates

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

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

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

Report Period	Jan, 2021 (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 1,132 interviews as of February 2.
- We delivered a preliminary Wave 3 dataset containing the first ~600 cases and a draft version of the crosswalk to Harvard.
- We continued programming and testing the changes to the survey (mostly additions to Army status questions and homelessness section).
- We discovered a problem with the Replicate 1 Omnibus consent preload and fixed it. In the end, 105 respondents who were not supposed to see this question (because they had previously given consent) were asked, but only one respondent changed their answer from "yes" to "no."
- We continued bi-weekly meetings with the ODUSA to coordinate Safety Plan and respondent locating activities.
- James attended the January 26 meeting, in which a trial of a new Analysis Proposal Review Process was carried out.
- We submitted a ballpark budget for a study of U.S. Army Soldiers in Germany to Dr. Kessler. (This is a STARRS-affiliated study, not part of STARRS scope or funding. The cost of creating the ballpark was not charged to STARRS).
- We reviewed and provided feedback on the completed SOW for the ODUSA/GSC.
- We updated an internal Enclave and data summary document, which will be used to start drafting a more detailed list of items for consideration in an orderly transition.
- IRB:
  - o A STARRS-LS Continuation amendment (#3), describing changes to the instrument and a change to the estimate for participation from 45 to 60 minutes, was approved by U-M on January 5. The USUHS IRB determined the changes are not considered "substantive modifications" and do not need secondary concurrence.
  - o A STARRS-LS Continuation amendment (#4), for changing the estimate for participation in the CATI survey from 60 minutes to one hour and forty minutes was submitted on January 26, approved on January 29, and sent to USUHS on January 29.
  - o We learned of a possible breach of protocol from Wave 1 and will be submitting the details as an ORIO in February.
- Reminders for the Annual Security Training Renewal were sent to U-M STARRS Data Enclave users for completion by February 1.
- Our Enclave security lead re-sent follow-up materials from the Annual Security Controls Review meeting with ODUSA/AAG. We awaited the final report/approval from AAG.
- We pulled together the number of records and search years for the annual NDI data request and sent these to USUHS for submission to the ODUSA.
- Our data managers worked to identify respondents who completed both LS1 and LS2 surveys, and had different addresses at LS1 and LS2 for a geocoded link file request.
- We continued work on biomarker group requests for assistance. During the month, we continued work on one large data request.
- We awaited signature/approval from the Army to reduce the security level of the ICPSR public data by moving data access from the Virtual Data Enclave (VDE) to the "Secure Download" option (called IDARS - ICPSR Data Access Request System).

Special Issues

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

☐ Wave 3 Challenges

o 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 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.

o 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.

o 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

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

☐ Scope additions

o There are a few cost estimates for new scope that have yet to be made (Table 2 above). As decisions are made, we will work with the research team to schedule and implement this work.

o We have received some information on additional public use data releases, including release to the NIH National Data Archive. Several unknowns need to be clarified before we can finalize our scope and cost estimates and determine what staffing will be needed for this work.

Cost
Jan 31, 2021

Total Cost to Date (Direct + Indirect):	1,139,553.00
Estimated Cost at Completion (E$AC):	13,368,084.00
Total Budget:	12,808,287.00
Variance (Budget minus E$AC):	-558,694.00
Reason For Variance:	We are currently projecting a deficit of $558,694 for the total project (from last month's deficit of $316,330). This is about 4.4% of the 5-year budget. We will continue to monitor production rates and update the cost figures accordingly. In these updates, we assumed the Wave 4 interview would stay long, ~95 minutes. Additional areas for cost increases this month were in instrument programming (increased hours for survey changes), some additional technical staff hours, and adding hours for Enclave Security coordination support.

Projections
Jan 31, 2021

Dollars Projected For Month:	207,339.00
Actual Dollars Used:	259,375.00
Variance (Projected minus Actual):	-52,036.00
Reason For Variance:	We spent a total of $259,375 in December. This month, we took a second pass at using early Wave 3 production information to update projections. Our projected costs have increased, in large part due to the longer survey instrument time for CATI.

Measures

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

Other Measures

Project Name	Surveys of Comsumer Attitudes (SCA 2021)
Project Mode	Primary: Telephone Total of Modes: 1
Project Type	Sponsored Projects
	Project Status Current
Budget	***Direct Budget:*** 1,109,882.00 ***InDirect Budget:*** 0.00 ***Total Budget:*** 1,109,882.00
Principal Investigator/Client	Richard Curtin (SCA) Tuba Suzer-Gurtekin (SCA)
Funding Agency	
IRB	***HUM#:*** ***Period Of Approval:***
Project Team	***Project Lead:*** Theresa Camelo ***Budget Analyst:*** Dean E Stevens ***Production Manager:*** Lisa J Carn ***Senior Project Advisor:*** Shonda R Kruger-Ndiaye ***Production Manager:*** ***Production Manager:***
Proposal #:	no data
Description:	The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations. The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 600 interviews.
SRO Project Period	12/2021 - 12/2021
Data Col Period	01/2021 - 12/2021
Security Plan	NA

Milestone Dates

PreProduction Start:	***Pretest Start:***
Pretest End:	***Recruitment Start:***
Staffing Completed:	***GIT Start:***
SS Train Start:	***SS Train End:***
DC Start: 01/02/2021	***DC End:*** 01/25/2021

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

- -

Report Period	Jan, 2021 (SCA 2021)
	Project Phase Initiation
Risk Level	*On Track*
Monthly Update	SCA JAN 2021 began as scheduled on 1/2/2021, and ended as scheduled on 1/25/2021. We completed 603 IWs (322/180/101). Three IWs above our goal of 600 (320/180/100); at an overall hpi of 2.8 (.2 below our budgeted hpi of 3.0).
Special Issues	

Cost
Feb 16, 2021

Total Cost to Date (Direct + Indirect):	81,266.69
Estimated Cost at Completion (E$AC):	1,109,882.00
Total Budget:	1,109,882.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	NA

Projections
Feb 16, 2021

Dollars Projected For Month:	92,475.30
Actual Dollars Used:	81,266.69
Variance (Projected minus Actual):	11,208.61
Reason For Variance:	reduced hpi

Measures

	Units Complete	RR	HPI
Current Goal:	600		3.0
Goal at Completion:	600		3.0
Current actual:	603		2.8
Estimate at Complete:	603		2.8
Variance:	3		-0.2

Other Measures

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

Project Type	Sponsored Projects		**Project Status**	Current
Budget	**Direct Budget:** 241,958.00	**InDirect Budget:** 135,497.00	**Total Budget:**	377,455.00

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

Funding Agency National Science Foundation
IRB **HUM#:** HUM00159711 **Period Of Approval:** Exempt
Project Team

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

Proposal #: no data

Description:

This research project will examine data quality, participation, respondent experience, and costs in two promising but not yet widely deployed survey modes that use off-the-shelf video technology and are less costly than face to face (FTF) interviews: video-mediated (VM) interviews (live two-way communication via platforms like Skype) and video self-administered (VS) interviews, in which video-recorded interviewers ask the questions and respondents answer by typing or clicking. This project will compare these measures of data quality and costs in VM and VS interviews carried out by the same professional interviewers and in conventional online (textual) self-administered questionnaires, asking the same survey questions to members of a representative sample who are randomly assigned to one of these three modes. Because VM is synchronous and "live" like face-to-face (FTF) interviewing, and VS is asynchronous and recorded but still projects a human face, the project's comparisons will provide new insights regarding how these decomposable aspects of human contact affect behavior and experience in surveys. The project's results will reveal the extent to which, and for whom, less costly interaction (live but remote vs. recorded) with an interviewer promotes engagement and data quality comparable to what is found in similar FTF interviews. More generally, the findings will address when and in what ways modern communication modes that reduce social presence and are less personal might be equal to or even more effective than FTF interaction. Findings from this project will provide valuable information relevant to the future of survey measurement and will be of interest to survey researchers in the Federal statistical system and other survey organizations.

Even as survey data continue to be central to public policy and decision-making, survey measurement is challenged by declining response rates, increasing costs, declining trust in survey organizations, and rapidly changing communication habits among the public. Understanding how video technologies could fit into the future of survey data collection is important both because it may meet potential respondents "where they live" and because it may provide a significantly lower cost alternative to FTF interviewing. There is even the potential to reach some members of the public whose location makes FTF interviewing difficult or expensive, but who may well be able to participate in a video interview (e.g., people who live in remote rural areas or members of the military deployed overseas). In comparing data quality across these three survey modes, the project will quantify participation rates, connectivity problems, respondent compliance with the video interviewing protocol, conscientious responding (giving precise answers to numerical questions, thoughtfully differentiating answers), and disclosure of sensitive information. The project will measure the potential impact of individual interviewers, feelings of engagement with the interview, rapport with the interviewer, and respondent satisfaction. The project also will allow assessment of data collection costs across these modes. Access to and use of video technologies are not universal, and even among those with access some are willing to engage in video interaction while others are reluctant. The project will begin to address whether and how the effects of video technologies on survey data collection differ for participants with different levels of prior experience and preference for using the technologies.

SRO Project Period 09/2018 - 06/2020
Data Col Period 08/2019 - 11/2019
Security Plan NA
Milestone Dates

PreProduction Start:	**Pretest Start:**
Pretest End:	**Recruitment Start:**
Staffing Completed:	**GIT Start:**
SS Train Start:	**SS Train End:**
DC Start: 10/29/2019	**DC End:** 04/01/2020

Other Project Team Members:	Kallan Larsen - PSM MS Student
	Ai Rene Ong - PSM PhD Student
	Tianheao Wang - PSM MS Student
	Kevin Jensen (TSG) - portal/Blaise programming
	Shanti Suresh, Matt Hanger, & Laura Yoder (TSG) - data management
	Kyle Goodman - MSMS set-up programming
	Jim Rodgers - MSMS consultation
	Brady West - Research Associate Professor, Survey Research Center
Other Project Names:	Video Communication Technologies
Sample Mgmt Sys	MSMS
Data Col Tool	Blaise 5
Hardware	Desktop; Other (Webcam, USB headset)
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group; Other (CloudResearch (TurkPrime))
Payment Type	Cash, prepaid ($2); Other (ABS=$2 giftcode -> prepaid; $20/$22 giftcode -> post)
Payment Method	Imprest Cash Fund from ISR Business Office; Other (TurkPrime (now CloudResearch))

Report Period	Jan, 2021 (VCT)	**Project Phase**	Closing

Risk Level *On Track*

Monthly Update

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

Work continues on the first findings paper based on the 2020 AAPOR presentation. 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 new MiCDA funds were received, set-up and projection made (in the cost notes section).

Our 2021 AAPOR submissions were accepted.
-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 pre- and 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)

The team is working on a submission to the General Online Research (GOR) 2021 conference.

Matt did what he could do before he left. Laura will need to do a final MSMS data set in the future. Andrew and Kallan have to finish finalizing the remaining lines. That won't happen until sometime after the PSID launch.

Special Issues

Cost
Feb 28, 2021

Total Cost to Date (Direct + Indirect):	360,432.97
Estimated Cost at Completion (E$AC):	376,699.24
Total Budget:	377,455.00
Variance (Budget minus E$AC):	302.76
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 analysis funds are:
Total Budget: $30,089
Total Cost to Date: $3,234.04
Estimated cost at completion: $24,665.73
Variance: $5,423.27

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

Projections
Feb 28, 2021

Dollars Projected For Month:	758.10
Actual Dollars Used:	1,747.56
Variance (Projected minus Actual):	-989.46
Reason For Variance:	There were some HRS charges that hit by mistake and the archiving hours appeared even though they were projected in a future month. Those hours will be moved (no work was done yet).

Measures

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

Other Measures

Survey Research Operations

Monthly Project Report

Development Initiative and No Data Collection Projects

January 2021

Developmental Initiatives

(TSME21-SelfSchedUI (483424)) Self-Scheduling Interface for MSMS
(TSME SRO SYS MAINTENANCE-GENERAL (483910)) TSME SRO SYS MAINTENANCE-GENERAL(483910)
(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-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

NonArchived Development Initiative and No-DataCol Projects

Project	Type	Status	Jan	Feb
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-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	🟡	☐
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 Investigator/Client

Funding Agency

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

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

Proposal #:   no data

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

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

SRO Project Period   07/2020 - 06/2021

Data Col Period

Security Plan   NA

Milestone Dates

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

Other Project Team Members:
James Rodgers - Tech Lead
Holly Ackerman - Developer (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	Jan, 2021 (TSME21-SelfSchedUI (4834	**Project Phase**	Implementing

Risk Level   *Some Concerns*

Monthly Update   Development of the self-scheduler began in January. Peter was able to get a draft version of the respondent UI up. It needs to be polished over the coming weeks (Karl may attempt).

The schedule/reschedule API is in place. Peter has been working with Holly to get the flow worked out. Peter will also need to write a contact attempt to MSMS when whatever action is being taken (re/schedule or cancel) has been completed. There is an existing API that can be used for that work. That work is on going. The cancel API is not yet in place.

A screen mock-up will be sent to the PSID PIs in February. Andrew can adapt some of the slides he is preparing to an update of the PDMG group in February.

Andrew and Jim have most of the things worked out with MSMS. There are a few items related to display and the emails that Jim and Andrew need to discuss.

Special Issues

Cost
Feb 28, 2021

Total Cost to Date (Direct + Indirect):	10,125.23
Estimated Cost at Completion (E$AC):	29,249.66
Total Budget:	30,000.00
Variance (Budget minus E$AC):	750.34
Reason For Variance:	Developer didn't work as many hours as projected.

Projections
Feb 28, 2021

Dollars Projected For Month:	8,070.58
Actual Dollars Used:	7,233.05
Variance (Projected minus Actual):	837.53
Reason For Variance:	Peter didn't work quite as many hours as projected. Karl did charge some hours, but that line was mostly (not completely) used.

Measures

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

Other Measures

Project Name	TSME SRO SYS MAINTENANCE-GENERAL(483910) (TSME SRO SYS MAINTENANCE-GENERAL (483910))
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

Project Status Current

Budget	*Direct Budget:* 20,000.00	*InDirect Budget:* 0.00	*Total Budget:* 20,000.00

Principal Investigator/Client

Funding Agency

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

Project Team	
Project Lead:	Jeffrey L Smith
Budget Analyst:	Janelle P Cramer
Production Manager:	
Senior Project Advisor:	Gregg Peterson
Production Manager:	
Production Manager:	

Proposal #: no data

Description: This project will be used to support all maintenance/ enhancement needs for applications or systems directly related to the Surveytrak Production database which would include Surveytrak, ST Administration, SRS RT and RCLS to name a few.

SRO Project Period 10/2020 - 06/2021

Data Col Period

Security Plan NA

Milestone Dates

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

Other Project Team Members:	Marsha Skoman Pam Swanson Ashwin Dey Jeff Smith
Other Project Names:	Sys Maint General
Sample Mgmt Sys	SurveyTrak
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	Not used
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Jan, 2021 (TSME SRO SYS MAINTEN/	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update
Please note: ST developers meet twice a month for 1 hour.
Here is a list of tasks that have been charge to this project since September 2020 through Feb. 2021.
- Document PowerBuilder 2019 R2
- DRAS and SQL server upgrade
- PB/ST Team meetings
- SurveyTrak send/receive test
- Add Visual Studio solutions to GIT
- Archive planning of ST builds and Blaise data models
- Document PowerBuilder 2019 R2
- Meet with Genise about 8 digit IDs

- PB/ST Team meetings
- RCLS meeting with Larry
- ST file transfer - long file names
- SurveyTrak upgrade meetings
- New build of SurveyTrak and new PFC PBLs
- PB/ST Team meetings
- STTM enhancements
- tAppointment table cleanup
- Appointment times in SurveyTrak
- BCP DLLs getting locked in SurveyTrak
- Blaise data model archiving
- Password generating algorithm
- PB/ST Team meetings
- Plan B testing
- Rpay Wizard bug fixing
- SRO ID meeting
- ST file transfer - long file names

Special Issues

The EDC project will be the first project to use the our extended 15 character ID and the latest version of Surveytrak that includes the new Appointment feature.

Cost
Feb 28, 2021

Total Cost to Date (Direct + Indirect):	6,604.91
Estimated Cost at Completion (E$AC):	10,604.91
Total Budget:	20,000.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	There is additional work to be completed on tools used to support the database

Projections
Feb 28, 2021

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	There is additional work to be completed on tools used to support the database

Measures

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

Other Measures

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

Project Status   Current

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

Principal Investigator/Client

Funding Agency

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

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

Proposal #:	no data
Description:	The ongoing development project, maintain the SRO international domain system infrastructure and support new feature development

SRO Project Period	07/2020 - 06/2021
Data Col Period	
Security Plan	NA

Milestone Dates

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

Other Project Team Members:	LihShwu, Genise, Sarah, Cheng, Marsha, Pam, and Gina
Other Project Names:	TSME21 - ST international
Sample Mgmt Sys	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Jan, 2021 (TSME21-ST international (4	**Project Phase**	Implementing
Risk Level	*On Track*		
Monthly Update	minors updates with ST international and FUM		

Special Issues

Cost		
Feb 28, 2021	*Total Cost to Date (Direct + Indirect):*	18,718.00
	Estimated Cost at Completion (E$AC):	40,000.00
	Total Budget:	40,000.00
	Variance (Budget minus E$AC):	89.00
	Reason For Variance: no issues	

Projections
Feb 28, 2021

Dollars Projected For Month:	2,337.00
Actual Dollars Used:	2,447.00
Variance (Projected minus Actual):	-39.00
Reason For Variance:	no issue

Measures

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

Other Measures

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

Project Status Current

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

Principal Investigator/Client

Funding Agency

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

Project Team		
	Project Lead:	Hueichun Peng
	Budget Analyst:	Carl S Remmert
	Production Manager:	
	Senior Project Advisor:	Meredith A House
	Production Manager:	
	Production Manager:	

Proposal #:   no data

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

SRO Project Period   07/2020 - 06/2021

Data Col Period

Security Plan   NA

Milestone Dates

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

Other Project Team Members:

Other Project Names:

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	Jan, 2021 (TSME21- Illume Upgrade (4	**Project Phase**	Initiation

Risk Level   *On Track*

Monthly Update   We set up the Illume test 4 environment and successfully made the Enterprise Manager working.

Special Issues

Cost
Feb 28, 2021

Total Cost to Date (Direct + Indirect):	1.00
Estimated Cost at Completion (E$AC):	4,455.00
Total Budget:	13,000.00
Variance (Budget minus E$AC):	5,544.00
Reason For Variance:	projection needs to be updated

Projections
Feb 28, 2021

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

Measures

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

Other Measures

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

Project Status Current

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

Principal Investigator/Client

Funding Agency

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

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

Proposal #:   no data

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

SRO Project Period   07/2020 - 06/2021

Data Col Period

Security Plan   NA

Milestone Dates

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

Other Project Team Members:

Other Project Names:

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

Report Period	Jan, 2021 (TSME21-Blaise 5 Testing (4 **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	start to test Blaise 5.9 version features

Special Issues

Cost
Feb 28, 2021

Total Cost to Date (Direct + Indirect):	11,488.00
Estimated Cost at Completion (E$AC):	27,152.00
Total Budget:	30,000.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	No issue

Projections
Feb 28, 2021

Dollars Projected For Month:	3,576.00	
Actual Dollars Used:	3,951.00	
Variance (Projected minus Actual):	-375.00	
Reason For Variance:	No issue	

Measures

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

Other Measures

Project Name	TSME21-ColdFusion Server Upgrade (425197) (TSME21-ColdFusion Server Upgrade (425197))
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

Project Type	Developmental Initiatives		**Project Status**	Current	
Budget	***Direct Budget:*** 10,000.00	***InDirect Budget:*** 1.00		***Total Budget:***	10,000.00

Principal Investigator/Client

Funding Agency

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

Project Team

Project Lead:	Hueichun Peng
Budget Analyst:	Carl S Remmert
Production Manager:	HollyJoyce Stewart Ackerman
Senior Project Advisor:	Gregg Peterson
Production Manager:	
Production Manager:	

Proposal #:   no data

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

SRO Project Period   07/2020 - 06/2021

Data Col Period

Security Plan   NA

Milestone Dates

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

Other Project Team Members:

Other Project Names:

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	Jan, 2021 (TSME21-ColdFusion Server **Project Phase** Initiation
Risk Level	*On Track*
Monthly Update	Holly and Hueichun discussed the timeline on this task. Due to tight timeline, we might ask CMT to purchase support extension for the server. Also, due to resource availability, Ashwin will join the team to implement most of the work starting in March with Holly's help.
Special Issues	

Cost
Feb 28, 2021

Total Cost to Date (Direct + Indirect):	1.00
Estimated Cost at Completion (E$AC):	9,937.00
Total Budget:	10,000.00
Variance (Budget minus E$AC):	63.00
Reason For Variance:	Projections need to be updated.

Projections
Feb 28, 2021

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

Measures

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

Other Measures

Project Name	TSME21-Day in the Life Videos (425201) (Day in the Life Videos)
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

Project Status Current

Budget *Direct Budget:* 18,000.00 *InDirect Budget:* 0.00 *Total Budget:* 18,000.00

Principal Investigator/Client

Funding Agency

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

Project Team
Project Lead: Vivienne Y Outlaw
Budget Analyst: Carl S Remmert
Production Manager:
Senior Project Advisor:
Production Manager:
Production Manager:

Proposal #: no data

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

SRO Project Period 07/2020 - 06/2021
Data Col Period
Security Plan NA
Milestone Dates

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

Other Project Team Members: Russ Stark
Barb Homburg
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 Jan, 2021 (Day in the Life Videos) **Project Phase** Initiation

Risk Level *On Track*

Monthly Update No work performed in Jan 2021

Special Issues

Cost
Feb 10, 2021
Total Cost to Date (Direct + Indirect): 7,949.44
Estimated Cost at Completion (E$AC): 16,495.51
Total Budget: 18,000.00
Variance (Budget minus E$AC): 1,504.49
Reason For Variance: no work done due to staff leave

Projections
Feb 10, 2021

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

Measures

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

Other Measures

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

Project Status Current

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

Principal Investigator/Client

Funding Agency

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

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

Proposal #:	no data
Description:	This includes all the support and development work for a suite of tech systems DCO uses, including Fred, Recruitment Website, Iwer Web Site, etc.
SRO Project Period	07/2020 - 06/2021
Data Col Period	
Security Plan	NA

Milestone Dates

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

Other Project Team Members:

Other Project Names:

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	Jan, 2021 (TSME21-DCO Tech System **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	1. Set up automatic Email job for the e-sign module.
	2. Modified existing Fred for the addition of SRO_ID.
	3. Hueichun, Mike and V met and discussed revisions for Inventory interface and Footprint notification as related to SRO_ID.
	4. Followed up with CMT on the Confidentiality database change as it impacted Fred's automatic import of confidentiality signing date for FOTY and regular business.
	5. Modified Footprint import procedure to use the new "assignment_ID" as the basis of linking and changed the import job to be hourly instead of daily.
Special Issues	

Cost
Feb 11, 2021

Total Cost to Date (Direct + Indirect):	14,249.49
Estimated Cost at Completion (E$AC):	22,777.66
Total Budget:	25,000.00
Variance (Budget minus E$AC):	2,227.34
Reason For Variance:	ongoing work scope changes

Projections
Feb 11, 2021

Dollars Projected For Month:	31,506.32
Actual Dollars Used:	3,672.46
Variance (Projected minus Actual):	3,512.89
Reason For Variance:	foty took more time

Measures

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

Other Measures

Project Name	TSME21-QC-Systems (483249) (TSME21-QC-Systems (483249))
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

			Project Status	Current	

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

Principal Investigator/Client

Funding Agency

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

Project Team   *Project Lead:*   Sarah Elisa Broumand
Budget Analyst: Carl S Remmert
Production Manager:
Senior Project Advisor: Gina-Qian Yang Cheung
Production Manager:
Production Manager:

Proposal #:   no data

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

SRO Project Period   07/2020 - 06/2021

Data Col Period

Security Plan   NA

Milestone Dates

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

Other Project Team Members:

Other Project Names:

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

Report Period	Jan, 2021 (TSME21-QC-Systems (483:	**Project Phase**	Implementing

Risk Level   *On Track*

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

There will be a hike in hours in February as we prepare for the UMId changes in Olive and ODS.

Special Issues   none

Cost
Jan 31, 2021

Total Cost to Date (Direct + Indirect):	6,407.00
Estimated Cost at Completion (E$AC):	25,515.28
Total Budget:	30,000.00
Variance (Budget minus E$AC):	4,484.72
Reason For Variance:	Unable to spend the hours due to other project priorities. Planning on using funds on 3rd and 4th quarter.

Projections
Jan 31, 2021

Dollars Projected For Month:	2,420.46
Actual Dollars Used:	310.07
Variance (Projected minus Actual):	2,110.39
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:				

Other Measures

Project Name	TSME21-RCLS (TSME21-RCLS (425196))
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives **Project Status** Current
Budget	*Direct Budget:* 15,000.00 *InDirect Budget:* 0.00 *Total Budget:* 15,000.00
Principal Investigator/Client	
Funding Agency	
IRB	*HUM#:* *Period Of Approval:*
Project Team	*Project Lead:* Jim Rodgers
	Budget Analyst: 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	07/2020 - 06/2021
Data Col Period	
Security Plan	NA

Milestone Dates

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

Other Project Team Members:	
Other Project Names:	Respondent Lookup
Sample Mgmt Sys	SurveyTrak; SMS; Web SMS; MSMS
Data Col Tool	NA
Hardware	Other (MSMS and SuveyTrak servers)
DE Software	NA
QC Recording Tool	NA
Incentive	Not used
Administration	N/A
Payment Type	N/A
Payment Method	N/A

Report Period	Jan, 2021 (TSME21-RCLS (425196)) **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	Work is proceeding, but other sponsored projects took priority.
Special Issues	

Cost
Jan 31, 2021

Total Cost to Date (Direct + Indirect):	3,693.87
Estimated Cost at Completion (E$AC):	6,560.62
Total Budget:	15,000.00
Variance (Budget minus E$AC):	8,439.38
Reason For Variance:	Other sponsored projects took priority.

Projections
Jan 31, 2021

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

Other Measures

Project Name	TSME21-Replayer (TSME21-Replayer (425267))
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

Project Status Current

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

Principal Investigator/Client

Funding Agency SRC and HRS

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

Project Team
Project Lead:	Jennifer C Arrieta
Budget Analyst:	Carl S Remmert
Production Manager:	
Senior Project Advisor:	Gina-Qian Yang Cheung
Production Manager:	
Production Manager:	

Proposal #: no data

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

SRO Project Period 09/2019 - 06/2021
Data Col Period
Security Plan NA
Milestone Dates

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

Other Project Team Members:	Youhong Liu, Colette Keyser, Jason Ostergren
Other Project Names:	Replaher
Sample Mgmt Sys	NA
Data Col Tool	NA
Hardware	Desktop
DE Software	N/A
QC Recording Tool	N/A
Incentive	Not used
Administration	N/A
Payment Type	N/A
Payment Method	N/A

Report Period	Jan, 2021 (TSME21-Replayer (425267) **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	During the month, the team focused on programming and testing bug fixes in the Replayer utility. In addition, the team submitted a proposal to SRO Admin requesting funding for the Phase II work related to set-up and deployment of the utility.
Special Issues	

Cost
Jan 31, 2021

Total Cost to Date (Direct + Indirect):	3,545.45
Estimated Cost at Completion (E$AC):	4,826.41
Total Budget:	5,000.00
Variance (Budget minus E$AC):	173.50
Reason For Variance:	Minimal variance

Projections
Jan 31, 2021

Dollars Projected For Month:	1,394.22
Actual Dollars Used:	1,321.02
Variance (Projected minus Actual):	73.20
Reason For Variance:	Minimal variance

Measures

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

Other Measures