

# ***Survey Research Operations***

## ***Monthly Project Report***

***Sponsored***

***March 2021***



## Sponsored Projects

(ACL6) *Americans' Changing Lives - Wave 6*  
 (ACL-LIFE) *ACLLIFE Life History Interview and Validation (ACLLIFE)*  
 (AFHS) *American Family Health Study*  
 (ALS Controls) *ALS Matched Control Recruitment*  
 (BFY) *Baby's First Years*  
 (C.A.R.E.) *Concussion Assessment, Research and Education (CARE) Consortium*  
 (CBII) *Mellon College and Beyond II*  
 (CDS-19) *PSID Child Development Supplement V (2019)*  
 (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*  
 (H&WB) *Health and Wellbeing in Southeast Michigan*  
 (HCAP 2020) *Harmonized Cognitive Assessment Protocol, 2020*  
 (HCDC, H&C) *Housing & Children*  
 (HRS 2020) *Health and Retirement Study 2020*  
 (HRS 2020 ABT) *HRS 2020 COVID Antibody Test*  
 (HRS 2021 OYMS / COVID Survey) *HRS 2021 Off-Year Mail Study*  
 (IHDS3) *India Human Development Survey Wave 3*  
 (MARS 2) *Malaysia Ageing and Retirement Study Wave 2*  
 (MTF base year 2017-2022) *Monitoring the Future - Base Year 2017-2022*  
 (MTF HID) *MTF High Intensity Drinking*  
 (MTF Panel (main data collection) 2021) *Monitoring the Future Panel (web) 2021*  
 (PSID21) *Panel Study of Income Dynamics 2021*  
 (SCA 2021) *Surveys of Consumer Attitudes*  
 (STARRS-LS Waves 3 & 4) *Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study*  
 (VCT) *Video Communication Technologies in Survey Data Collection*  
 (WMH-Qatar) *Qatar World Mental Health Survey*

## Projects Report Query/Monthly Update Q

Select Calendar Year 2021 

Click the month to pull up Project Monthly report for the month for that project type.

Click the Project Name to pull up Project Monthly Archive Report for the Project.



### NonArchived Sponsored Projects

Project	Type	Status	Project Lead	Jan	Feb	Mar
<i>ACL6</i>	Sponsored	Current	Terri Ann Ridenour			
<i>ACL-LIFE</i>	Sponsored	Current	Terri Ann Ridenour			
<i>AFHS</i>	Sponsored	Current	Rebecca Gatward			
<i>ALS Controls</i>	Sponsored	Current	Rebecca Loomis			
<i>BFY</i>	Sponsored	Current	Piotr Dworak			
<i>C.A.R.E.</i>	Sponsored	Current	Donnalee Ann Grey-Farquharson			
<i>CBII</i>	Sponsored	Current	Maureen Joan O'Brien			
<i>CDS-19</i>	Sponsored	Current	Rachel Anne Orlowski			
<i>DAWN CS</i>	Sponsored	Current	Juan Carlos Donoso			
<i>ECHO</i>	Sponsored	Current	Terri Ann Ridenour			
<i>EDCPE</i>	Sponsored	Current	Karin Schneider			
<i>EDC-Semi Structured</i>	Sponsored	Current	Karin Schneider			
<i>H&amp;WB</i>	Sponsored	Current	Juan Carlos Donoso			
<i>HCAP 2020</i>	Sponsored	Current	Maureen Joan O'Brien			
<i>HCDC, H&amp;C</i>	Sponsored	Current	Barbara Lohr Ward			
<i>HCDC, H&amp;C</i>	Sponsored	Current	Barbara Lohr Ward			
<i>HRS 2020</i>	Sponsored	Current	Evanthia Leissou			
<i>HRS 2020 ABT</i>	Sponsored	Current	Evanthia Leissou			
<i>HRS 2021 OYMS / COVID Survey</i>	Sponsored	Current	Ian Ogden			
<i>IHDS3</i>	Sponsored	Current	Gina-Qian Yang Cheung			
<i>MARS 2</i>	Sponsored	Current	Margaret Lee Hudson			
<i>MTF base year 2017-2022</i>	Sponsored	Current	Rebecca Gatward			
<i>MTF HID</i>	Sponsored	Current	Peter Rakesh Batra			
<i>MTF Panel (main data collection) 2021</i>	Sponsored	Current	Donnalee Ann Grey-Farquharson			
<i>PSID21</i>	Sponsored	Current	Shonda R Kruger-Ndiaye			
<i>SCA 2021</i>	Sponsored	Current	Theresa Camelo			
<i>STARRS-LS Waves 3 &amp; 4</i>	Sponsored	Current	Meredith A House			
<i>VCT</i>	Sponsored	Current	Andrew L Hupp			
<i>WMH-Qatar</i>	Sponsored	Current	Sarah Elisa Broumand			

**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 End:**

**Staffing Completed:**

**SS Train Start:** 02/15/2021

**DC Start:** 02/22/2021

**Pretest Start:**

**Recruitment Start:**

**GIT Start:**

**SS Train End:**

**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:**

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

<b>Report Period</b>	Mar, 2021 (ACL-LIFE)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	<i>Attention!</i>		
<b>Monthly Update</b>	<p>We are currently projecting a project overrun. The main drivers are as follows:</p> <p>(\$15,451) Fringe Benefits - higher average FB rate (~ 33%)</p> <p>(\$13,095) Hybrid Staff model - includes Survey Techs and Field IWER with higher Field rate</p> <p>(\$11,995) Programming additional Blaise requirements for Life History Grid functionality and enhancements requested by PI</p> <p>(\$6,198) CAPI for Field Iwers/ rates increase (H&amp;T rate increased from \$1.10 to \$1.39, CASIC increased from \$1.91 to \$2.01)</p> <p>(\$921) Additional data management support for QC systems</p> <p>(\$3,737) Help Desk support (only 40 hours included in proposal budget -- never enough)</p> <p>(\$866) Field Operation - rate increase from original \$3.41 to \$3.53 (different than last month due to charge error in December)</p> <p>-----</p> <p>Data Management</p> <p>Because we've implemented protocol / data management efficiencies across the project and have been able to apply the many lessons learned from ACL6, we expected to have modest DM projections from the start. However, due to DM turnover and the assignment of an inexperienced data manager, we've incurred additional data management staff charges due to DM support, consultation and training.</p> <p>We expressed our concerns to Laura and Gregg about these data management training costs incurred by our project. After further consultation with Laura (DataOps) and Ryan (Finance), and other projects, Gregg agreed to have some "training hours" (45) moved off of ACL-Life and on TSG OH account. Moving forward, we all agreed we'd work together to anticipate and communicate when the new data manager may need to charge beyond his allocation -- whether it's extra time for learning or whether it is scope-based increases.</p> <p>Although the staff member is new to this data management role at SRO and to our project, he has learned so much in just a few short months (~2-3). I am confident that these valuable data management skills (and his growing list of talents) will be utilized by our organization in the months ahead.</p>		
<b>Special Issues</b>	We could use guidance on additional strategies to address projected overrun. We've reduced Terri's projections as well as data management hours. We're trying to be as efficient as possible while also prioritizing / preserving main data collection (Iwer hours) needed to reach our current goal of 80% response rate.		
<b>Cost</b>			
<b>Apr 14, 2021</b>	<b>Total Cost to Date (Direct + Indirect):</b>	265,294.33	
	<b>Estimated Cost at Completion (E\$AC):</b>	756,301.91	
	<b>Total Budget:</b>	734,193.00	
	<b>Variance (Budget minus E\$AC):</b>	-22,108.91	

**Reason For Variance:**

We currently project a cost overrun. Main drivers of the projected overrun include:

- Higher average fringe benefit rate
- Hybrid staffing model that includes more Field lwers than SSL lwers
- Increased Blaise programming required to meet client specifications (life-history calendar grid, and additional historical events functionality)
- Higher actual Help Desk costs for training and production support (versus what is included in proposal budget)

A full summary of drivers and amounts attributed to each may be found here:

L:\projects\ACL-LIFE\02 Budget\Cost Monitoring\Cost Analysis\Overrun-underrun analysis\February\ACLlife Cost Needs Spreadsheet 02152021.xlsx

**Projections**  
**Apr 14, 2021**

**Dollars Projected For Month:**

109,295.27

**Actual Dollars Used:**

96,136.93

**Variance (Projected minus Actual):**

13,158.34

**Reason For Variance:**

The Interviewer hours projected are higher than actuals this month, as lab / field staff settle into their routines and expectations were confirmed during the first month of ACL-Life data collection. Respondent incentives projected were also higher than actuals.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>	1,026 (n=1,283)	80%	5
<b>Goal at Completion:</b>			
<b>Current actual:</b>	145		5
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

**Other Measures**

**Project Name** ALS Matched Control Recruitment (ALS Controls)

**Project Mode** Primary: Web

**Project Type** Sponsored Projects **Project Status** Current

**Budget** **Direct Budget:** 193,780.00 **Indirect Budget:** 108,518.00 **Total Budget:** 255,139.51

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

**Funding Agency**

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

**Project Team** **Project Lead:** Rebecca Loomis  
**Budget Analyst:** Megan Gomez-Mesquita  
**Production Manager:**  
**Senior Project Advisor:** Peter Rakesh Batra  
**Production Manager:**  
**Production Manager:**

**Proposal #:** no data

**Description:** This is a web screening project that is mailing letters to an ABS sample of 15,000 HH's in the Midland and Grand Rapids area. The letter contains a link to a 5-10 minute Qualtrics survey that screens eligible Respondents for a study that includes a blood draw. SRO's involvement is only with the Respondent screening and incentive payment for completing the screening questionnaire.

**SRO Project Period** 01/2020 - 12/2023

**Data Col Period** 09/2020 - 10/2023

**Security Plan** NA

**Milestone Dates**

<b>PreProduction Start:</b>	<b>Pretest Start:</b>
<b>Pretest End:</b>	<b>Recruitment Start:</b>
<b>Staffing Completed:</b>	<b>GIT Start:</b>
<b>SS Train Start:</b>	<b>SS Train End:</b>
<b>DC Start:</b>	<b>DC End:</b>

**Other Project** Dan Zahs (Sampling)

**Team Members:**

**Other Project Names:**

**Sample Mgmt Sys** NA

**Data Col Tool** Other (Qualtrics)

**Hardware** NA

**DE Software** NA

**QC Recording Tool** NA

**Incentive** Yes, R

**Administration** ISR Group (SRC Business Office)

**Payment Type** Check, post (10)

**Payment Method** NA

**Report Period** Mar, 2021 (ALS Controls) **Project Phase** Implementing

**Risk Level** On Track

**Monthly Update** March: Following the reactivation of ALS in February and the mailing of the invitation letters that had been printed and on hold since November, the PI team created a new version of the invitation letter to include wording on COVID safeguards. This new letter was used for the third mailing, which went out March 25, leaving one last batch of the original sampling design of 417 pieces to be mailed in April. After this, the team is open to a discussion of an increased sampling approach. There was a budget reallocation to reflect a 15.6% cut. This is currently not an issue as we are still projecting an underrun.

February: The ALS PI team received approval to resume research at our two targeted hospitals and asked SRO to send out the mailing that had been on hold since November. 417 pieces were mailed on Feb 18 and we have received 4 completed surveys since then. An updated invitation letter template mentioning COVID protocols was approved and this will be used for the March invitation letter mailing. We have resumed biweekly meetings with the PI team and will

discuss sampling strategies for the future, including the possibility of increasing the size and frequency of the mailings

December: The project continues to be on hold and may remain inactive for a few months until we get a clear indication from the PI that we are able to start up again. (This is mainly due to the fact that the two hospitals participating in the blood draws have stopped any non-essential service because of the increased Covid-19 cases.) Talks continue with the PI team regarding strategies once we resume regular mailings.

November: The PI had decided to skip the December mailing in consideration of respondents being overloaded with holiday mail, and to send a double batch in January. The November mailing had been sent to PrintCopyMail for printing and assembly but the week before the letters were scheduled to be mailed out, COVID spikes in Grand Rapids and Midland resulted in restrictions on tier 2 research studies. Respondents who completed the screening survey and were subsequently consented by Michigan Medicine can no longer be sent to the two area hospitals for blood draws. As a result, SRO mailings for this project are on hold until Michigan Medicine is allowed to proceed. A small number of completions from the October invitation letters continue to trickle in, requiring TOA checks to be printed and mailed.

October: The first batch of 417 letters was mailed 10/21/2020. We have 9 Qualtrics screener completes so far; 6 token of appreciation checks have been mailed and 3 more are pending.

September: Weekly check-in meetings with the PI/Project team have been set up. IRB approval for the amended documentation was received by the PI/Project Team and in the meantime we met with the project team to work on sampling questions and testing out the Qualtrics screening questionnaire. We are now on track to mail out the first batch of letters (n=417) to selected households at the end of October.

August: After 2 years of initial efforts, ASL Controls is finally ready to begin and the project teams for SRO and Michigan Medicine were assembled. Sampling methods were discussed and parameters particular to the study goals were agreed on, using an address based sample (ABS) through MSG. The letter to be sent to sample addresses was reviewed and revised. Additional screening questions of education, race, ethnicity, and gender were agreed to be added to the Qualtrics survey. These changes will need to be submitted in an amendment (being completed by the PI's team) to the IRB. U-M Printing Services will handle the printing, assembly, and mailing of the letters each month. Depending on IRB approval, and getting the sampling procedures finalized, the goal is to have the first batch of letters mailed by the end of September.

#### Special Issues

Cost  
Mar 31, 2021

<b>Total Cost to Date (Direct + Indirect):</b>	2,193.27
<b>Estimated Cost at Completion (E\$AC):</b>	166,153.10
<b>Total Budget:</b>	255,139.51
<b>Variance (Budget minus E\$AC):</b>	88,986.41

#### **Reason For Variance:**

The decrease in variance reflects the resumption of regular mailings in February and adjustments made for a budget reallocation. The previous budget total was \$302,298.00 now adjusted to \$255,139.51.

The variance is holding at this rate as the project was on hiatus since November. We received approval to send out the November mailing on Feb 18 and will plan to resume a regular schedule for as long as possible.

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

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

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

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



**Projections**  
**Mar 31, 2021**

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

**Measures**

Units Complete	RR	HPI
<i>Current Goal:</i>		
<i>Goal at Completion:</i>		
<i>Current actual:</i>		
<i>Estimate at Complete:</i>		
<i>Variance:</i>		

**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:	893,895.00	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**  
**Data Col Period**  
**Security Plan**  
**Milestone Dates**

01/2019 - 10/2022  
 05/2020 - 01/2022  
 NA

**PreProduction Start:** 05/03/2019  
**Pretest End:**  
**Staffing Completed:**  
**SS Train Start:**  
**DC Start:** 04/21/2020

**Pretest Start:**  
**Recruitment Start:**  
**GIT Start:**  
**SS Train End:**  
**DC End:** 10/31/2021

**Other Project Team Members:**

SRO Team: Leah Roberts, Andrew Hupp, Laura Yoder, Rose Zdybel, Pooja Varma-Laughlin, Jim Rodgers, Colette Keyser, Deb Wilson, Wen Chang

**Other Project Names:**

During the budget proposal stage this project was known as 'A More Efficient Web-Based Approach to Collecting National Family, Fertility and Reproductive Health Data'.

**Sample Mgmt Sys**

MSMS

**Data Col Tool**

Blaise 5; SAQ

**Hardware**

Desktop

**DE Software**

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

**QC Recording Tool**

N/A

**Incentive**

Yes, R

**Administration**

SRO Group

**Payment Type**

Check, post (Modules 1 - \$20, Module 2 - \$20 and Module 3 - \$30); Cash, prepaid (Screener IW - \$2 Potentially

**Payment Method**

Check through STRak RPay System; Check through other system (Info. from MSMS and transfer information via

**Report Period**

Mar, 2021 (AFHS)

**Project Phase**

Implementing

**Risk Level**

On Track

**Monthly Update**

March update

- Adaptive design expt. for Replicate 2 - proposal reviewed and design agreed.  
 - Updated projection Replicate 2 inline with revised design.  
 - Some (~80) cases received additional no-response reminder calls to help boost response)

**Special Issues**

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

**Cost**

**Apr 13, 2021**

**Total Cost to Date (Direct + Indirect):** 1,350,449.76

**Estimated Cost at Completion (E\$AC):** 2,488,825.53

**Total Budget:** 2,490,133.00

**Variance (Budget minus E\$AC):** 1,307.47

**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**

**Apr 13, 2021**

**Dollars Projected For Month:** 33,405.34

**Actual Dollars Used:** 36,482.74

**Variance (Projected minus Actual):** 3,077.39

**Reason For Variance:**

The source of the variance can mostly be attributed to non-salary costs - TOAs. The amount was higher than projected because we recently checked that payments had been issued for all Respondents who completed a paper survey over the last few months.

**Measures**

Units Complete	RR	HPI
<b>Current Goal:</b> <b>Goal at Completion:</b> <b>Current actual:</b> <b>Estimate at Complete:</b> <b>Variance:</b>		

**Other Measures**

<b>Project Name</b>	Americans' Changing Lives - Wave 6 (ACL6)			
<b>Project Mode</b>	Primary: Telephone	Secondary: Face to Face	Total of Modes: 2	
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current
<b>Budget</b>	<b>Direct Budget:</b>	495,251.00	<b>Indirect Budget:</b>	277,340.00
			<b>Total Budget:</b>	772,591.00
<b>Principal Investigator/Client</b>	Margaret Hicken (University of Michigan, SRC - SEH)			
<b>Funding Agency</b>	National Institutes of Health, National Institute on Aging			
<b>IRB</b>	<b>HUM#:</b>	HUM00153243	<b>Period Of Approval:</b>	Pending
<b>Project Team</b>	<b>Project Lead:</b>	Terri Ann Ridenour		
	<b>Budget Analyst:</b>	Grace Tison		
	<b>Production Manager:</b>	Lisa J Carn		
	<b>Senior Project Advisor:</b>	Shonda R Kruger-Ndiaye		
	<b>Production Manager:</b>			
	<b>Production Manager:</b>	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). Interviewers 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 End:****Staffing Completed:****SS Train Start:** 04/02/2019**DC Start:** 04/23/2019**Pretest Start:****Recruitment Start:** 02/25/2019**GIT Start:** 04/01/2019**SS Train End:** 04/03/2019**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**

Mar, 2021 (ACL6)

**Project Phase**

Implementing

**Risk Level**

On Track

**Monthly Update**

ACL6 data collection will resume as soon as there is eligible sample (based on ACL-Life interview outcome). Right now we have 6 cases and are awaiting for IRB approval for follow up.

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

**Special Issues****Cost****Total Cost to Date (Direct + Indirect):** 773,530.88**Estimated Cost at Completion (E\$AC):** 776,382.34**Total Budget:** 772,591.00**Variance (Budget minus E\$AC):** -3,791.34**Reason For Variance:** Please see Monthly Updates.**Projections****Dollars Projected For Month:** 38.87**Actual Dollars Used:** 170.22**Variance (Projected minus Actual):** -131.35

**Reason For Variance:**

Data management charges due to ACL6 (Tel-only Reboot) activity.  
Transferring active sample to Pooja and other related SurveyTrak and DBA tasks.

**Measures**

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

**Other Measures**

Home Visit Consent

Goal at Completion: 700

Current Actual: 413

Current Undecided: 20

<b>Project Name</b>	Baby's First Years (BFY)			
<b>Project Mode</b>	Primary: Face to Face      Total of Modes: 1			
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current
<b>Budget</b>	<b>Direct Budget:</b>	4,603,310.00	<b>Indirect Budget:</b>	1,825,015.73 <b>Total Budget:</b> 6,428,325.73
<b>Principal Investigator/Client</b>	Dr. Greg Duncan (University of California - Irvine) Dr. Kimberly Noble (Teachers College Columbia University) Dr. Katherine Magnuson (University of Wisconsin)			
<b>Funding Agency</b>	National Institute of Child Health and Human Development (NICHD)			
<b>IRB</b>	<b>HUM#:</b>	HUM00137963	<b>Period Of Approval:</b>	
<b>Project Team</b>	<b>Project Lead:</b>	Piotr Dworak		
	<b>Budget Analyst:</b>	Janelle P Cramer		
	<b>Production Manager:</b>	Barbara Aghababian-Homburg		
	<b>Senior Project Advisor:</b>	Stephanie A Chardoul		
	<b>Production Manager:</b>	Margaret Lavanger		
	<b>Production Manager:</b>	Anthony Romanowski		
<b>Proposal #:</b>	no data			
<b>Description:</b>	<p>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.</p> <p>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.</p> <p>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).</p> <p>SRO will be responsible for four interactions with the selected mothers/infants:</p> <ul style="list-style-type: none"> <li>• Baseline will occur immediately (within 24-48 hours) after birth, in the hospital;</li> <li>• Wave 1 will be a telephone interview with the mother when the child is 12 months old;</li> <li>• 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;</li> <li>• 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.</li> </ul> <p>Each data collection phase/wave will be a full 12 months, with Baseline starting in April 2018:</p> <p>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</p>			
<b>SRO Project Period</b>	10/2017 - 12/2020			
<b>Data Col Period</b>	04/2018 - 12/2020			
<b>Security Plan</b>	NA			



**Milestone Dates****PreProduction Start:** 10/01/2017**Pretest End:****Staffing Completed:** 02/07/2018**SS Train Start:** 03/20/2018**DC Start:** 05/07/2018**Pretest Start:****Recruitment Start:** 01/01/2018**GIT Start:** 03/19/2018**SS Train End:** 03/22/2018**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)  
 HHICD Household Income and Childhood Development

**Other Project****Names:****Sample Mgmt Sys****Data Col Tool****Hardware****DE Software****QC Recording Tool****Incentive****Administration****Payment Type****Payment Method**

MSMS  
 Blaise 5  
 Laptop; [UM cell] Phone  
 N/A  
 Other (to be specified)  
 Yes, R  
 SRO Group  
 Cash, prepaid (50)  
 Check through other system (MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (MSMS)

**Report Period**

Mar, 2021 (BFY)

**Project Phase**

Implementing

**Risk Level**

On Track

**Monthly Update**

Project updates:

BFY Age 2 continues on pace and started exceeding overall goals. We are currently @ 74% completion rate with a goal of reaching 93 - 94% by the end of June. As response rate increases the gap between control (less cooperative) and treatment (more cooperative) cases is growing again. This gap was all but eliminated but we have a longer tail of control cases that have been breaking appointments and not cooperating at the same rate as treatment cases. BFY has been approved by U-M to restart in-person locating visits by TCCU, NYSPI, and U-M however TCCU required an update to the Human Subject PEERS certifications and is reviewing submission before in-person visits start. 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	711	730	19
Nebraska	223	224	1
New York	189	203	14
Minnesota	86	85	-1
Louisiana	213	218	5

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:

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 in February despite savings in Direct (salary/non-salary) costs since it has been communicated to the PIs. This continues to be a concern. Increase is due to adjustments to IDC and fees and offsets savings in direct costs. This increase does not yet include estimated + \$10K in CASIC adjustments.

#### Special Issues

Cost  
 Mar 15, 2021

<b>Total Cost to Date (Direct + Indirect):</b>	5,064,419.82
<b>Estimated Cost at Completion (E\$AC):</b>	6,864,521.24
<b>Total Budget:</b>	6,428,325.73
<b>Variance (Budget minus E\$AC):</b>	-436,195.51
<b>Reason For Variance:</b>	Project is awaiting March budget update. The budget as of February 2021 has been communicated to the PIs and they are identifying funding sources to cover the overrun. February overrun continued to grow despite savings in direct costs due to difficulties projecting a mixed-funding flow of indirects.

Projections  
 Mar 15, 2021

<b>Dollars Projected For Month:</b>	95,918.74
<b>Actual Dollars Used:</b>	100,876.15
<b>Variance (Projected minus Actual):</b>	-4,957.41
<b>Reason For Variance:</b>	Savings in salary cost were actually higher but were offset by adjustments to fees. Lower iwer time and lower management cost.

#### Measures

	Units Complete	RR	HPI
<b>Current Goal:</b>	711	71%	7.0
<b>Goal at Completion:</b>	950	96%	7.0
<b>Current actual:</b>	730	73%	5.4
<b>Estimate at Complete:</b>	950	96%	6.0
<b>Variance:</b>			

#### Other Measures

<b>Project Name</b>	Concussion Assessment, Research and Education (CARE) Consortium (C.A.R.E.)					
<b>Project Mode</b>	Primary: Telephone	Secondary: Mail	Total of Modes: 2			
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current		
<b>Budget</b>	<b>Direct Budget:</b>	1,144,724.28	<b>Indirect Budget:</b>	302,360.14		
			<b>Total Budget:</b>	1,447,084.42		
<b>Principal Investigator/Client</b>	Dr. Steven Broglio (U of M Kinesiology) Dr. Michael McCrea (Medical College of Wisconsin) Dr. Thomas McAllister (Indiana University School of Medicine)					
<b>Funding Agency</b>						
<b>IRB</b>	<b>HUM#:</b>	<b>Period Of Approval:</b>				
<b>Project Team</b>	<b>Project Lead:</b>	Donnalee Ann Grey-Farquharson				
	<b>Budget Analyst:</b>	William Lokers				
	<b>Production Manager:</b>	Kathleen S Ladronka				
	<b>Senior Project Advisor:</b>	Barbara Lohr Ward				
	<b>Production Manager:</b>					
	<b>Production Manager:</b>					
<b>Proposal #:</b>	no data					
<b>Description:</b>	<p>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%.</p> <p>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.</p> <p>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.</p>					
<b>SRO Project Period</b>	12/2018 - 05/2021					
<b>Data Col Period</b>	02/2019 - 04/2021					
<b>Security Plan</b>	NA					
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center; vertical-align: top;"> <b>PreProduction Start:</b>  <b>Pretest End:</b>  <b>Staffing Completed:</b>  <b>SS Train Start:</b>  <b>DC Start:</b> </td> <td style="width: 50%; text-align: center; vertical-align: top;"> <b>Pretest Start:</b>  <b>Recruitment Start:</b>  <b>GIT Start:</b>  <b>SS Train End:</b>  <b>DC End:</b> </td> </tr> </table>				<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b>	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>
<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b>	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>					
<b>Other Project Team Members:</b>	Donnalee Grey-Farquharson, Kathy LaDronka, William Lokers, Hongyu Johnson, Keith Leibetreu, James Koopman					

**Other Project****Names:**

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

Report Period	Mar, 2021 (C.A.R.E.)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	<p>Project Management:</p> <ul style="list-style-type: none"><li>- It is confirmed that data collection will extend to April 30 with post work continuing into June 2021. Extra funds to cover the newly planned work extension have been received. Projection and budget reflect estimates for this extension.</li><li>-Development continues on the management system as does its documentation and the updating of field protocols</li></ul> <p>Data Manager:</p> <ul style="list-style-type: none"><li>- Continue to refine Dashboard and FPR reporting and QC systems and tools.</li><li>- Continue to conduct daily QC</li></ul> <p>Questionnaire:</p> <ul style="list-style-type: none"><li>- N/A</li></ul> <p>System</p> <ul style="list-style-type: none"><li>- continue to develop spec and Monitor &amp; troubleshooting for system</li><li>- Developing CSMS specification for next wave data collection.</li></ul> <p>Data Collection:</p> <ul style="list-style-type: none"><li>- Received Release#8 (1192) sample (all exposed cases subjects)</li><li>- Emphasis on locating. Working on alternative options to assist locating team.</li><li>- Developing optimal strategy for the final three months of production, such as planning bonus</li><li>- Monitoring production and setting priorities</li></ul> <p>Production Stats as of 03/31/2021:</p> <p>Overall RR: 37.20%</p> <p>Total Released Cases: 8879</p> <p>Total Complete IW: 3020</p> <p>Total Complete WEB IWs = 2802; CATI Comp lws= 210</p>		
Special Issues			
Cost			
Mar 31, 2021	Total Cost to Date (Direct + Indirect):	1,234,672.36	
	Estimated Cost at Completion (E\$AC):	1,403,967.26	
	Total Budget:	1,447,084.42	
	Variance (Budget minus E\$AC):	43,117.16	
	Reason For Variance:	1.Projection will be adjusted to reflect the full work scope for the data collection extension.	
		2. Received new Release#8 sample cases.	
Projections			
Mar 31, 2021	Dollars Projected For Month:	68,819.17	
	Actual Dollars Used:	60,485.38	
	Variance (Projected minus Actual):	8,333.79	
	Reason For Variance:	Field hours are a less than projected.	

Measures			
	Units Complete	RR	HPI
	<i>Current Goal:</i> <i>Goal at Completion:</i> <i>Current actual:</i> <i>Estimate at Complete:</i> <i>Variance:</i>		

Other Measures

<b>Project Name</b>	Detroit Area Wellness Program - COVID Supplement (DAWN CS)												
<b>Project Mode</b>	Primary: Telephone      Total of Modes: 1												
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current										
<b>Budget</b>	<b>Direct Budget:</b> 301,960.00	<b>Indirect Budget:</b> 169,097.00	<b>Total Budget:</b> 471,057.00										
<b>Principal Investigator/Client</b>	Kristine Ajrouch (Life Course Development Program, ISR) Toni Antonucci (Life Course Development Program, ISR) Laura Zahodne (Life Course Development Program, ISR)												
<b>Funding Agency</b>													
<b>IRB</b>	<b>HUM#:</b> HUM00154638	<b>Period Of Approval:</b>											
<b>Project Team</b>	<b>Project Lead:</b> Juan Carlos Donoso <b>Budget Analyst:</b> Parina Kamdar <b>Production Manager:</b> Taghreed Lovell <b>Senior Project Advisor:</b> Kirsten Haakan Alcser <b>Production Manager:</b> <b>Production Manager:</b>												
<b>Proposal #:</b>	no data												
<b>Description:</b>	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.												
<b>SRO Project Period</b>	10/2020 - 05/2021												
<b>Data Col Period</b>	12/2020 - 04/2021												
<b>Security Plan</b>	NA												
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"><b>PreProduction Start:</b> 10/01/2020</td> <td style="padding: 5px;"><b>Pretest Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>Pretest End:</b></td> <td style="padding: 5px;"><b>Recruitment Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>Staffing Completed:</b> 11/10/2020</td> <td style="padding: 5px;"><b>GIT Start:</b> 11/30/2020</td> </tr> <tr> <td style="padding: 5px;"><b>SS Train Start:</b> 12/02/2020</td> <td style="padding: 5px;"><b>SS Train End:</b> 12/04/2020</td> </tr> <tr> <td style="padding: 5px;"><b>DC Start:</b> 12/07/2020</td> <td style="padding: 5px;"><b>DC End:</b> 04/15/2021</td> </tr> </table>			<b>PreProduction Start:</b> 10/01/2020	<b>Pretest Start:</b>	<b>Pretest End:</b>	<b>Recruitment Start:</b>	<b>Staffing Completed:</b> 11/10/2020	<b>GIT Start:</b> 11/30/2020	<b>SS Train Start:</b> 12/02/2020	<b>SS Train End:</b> 12/04/2020	<b>DC Start:</b> 12/07/2020	<b>DC End:</b> 04/15/2021
<b>PreProduction Start:</b> 10/01/2020	<b>Pretest Start:</b>												
<b>Pretest End:</b>	<b>Recruitment Start:</b>												
<b>Staffing Completed:</b> 11/10/2020	<b>GIT Start:</b> 11/30/2020												
<b>SS Train Start:</b> 12/02/2020	<b>SS Train End:</b> 12/04/2020												
<b>DC Start:</b> 12/07/2020	<b>DC End:</b> 04/15/2021												
<b>Other Project Team Members:</b>	Ian Ogden, Kasyera Kowalczyk, Lisa Van Havermaet, Ashwin Dae, Jeffrey Smith, David Dybicki, John Gawlas, Brad Goodwin												
<b>Other Project Names:</b>	D-AMP CS												
<b>Sample Mgmt Sys</b>	SurveyTrak												
<b>Data Col Tool</b>	Blaise 4.8												
<b>Hardware</b>	Laptop; [UM cell] Phone												
<b>DE Software</b>	Blaise 4.8 BIA												
<b>QC Recording Tool</b>	DRI-CARI; Camtasia												
<b>Incentive</b>	Yes, R												
<b>Administration</b>	SRO Group												
<b>Payment Type</b>	Check, prepaid (\$25)												
<b>Payment Method</b>	Check through STrak RPay System												

<b>Report Period</b>	Mar, 2021 (DAWN CS)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	Some Concerns		
<b>Monthly Update</b>	- ACF sample released to interviewers. - Tech team continued to work on ST redesign for RDS implementation		

**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.
- SRS sample not performing as expected. Out of 334 lines released, 132 completed interviews. Pls were hoping for 200 white and 50 black completed interviews.
- Because of lack of resources, roll out of updated technical systems could take until mid april and production is scheduled to end in May.

**Cost**  
**Mar 31, 2021**

<b>Total Cost to Date (Direct + Indirect):</b>	287,995.00
<b>Estimated Cost at Completion (E\$AC):</b>	467,377.00
<b>Total Budget:</b>	471,057.00
<b>Variance (Budget minus E\$AC):</b>	3,679.00
<b>Reason For Variance:</b>	Latest cost report reflects all costs associated with implementing RDS design and a projected extension of production through the end of June.

**Projections**  
**Mar 31, 2021**

<b>Dollars Projected For Month:</b>	70,004.00
<b>Actual Dollars Used:</b>	37,061.00
<b>Variance (Projected minus Actual):</b>	32,942.00
<b>Reason For Variance:</b>	Low interviewer hours.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>			
<b>Goal at Completion:</b>			
<b>Current actual:</b>			
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

**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:	<p>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.</p> <p>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.</p> <p>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).</p> <p>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.</p> <p>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.</p> <p>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.</p>				
SRO Project Period	01/2017 - 08/2023				
Data Col Period	05/2018 - 03/2023				
Security Plan	NA				



**Milestone Dates****PreProduction Start:****Pretest End:****Staffing Completed:****SS Train Start:****DC Start:****Pretest Start:****Recruitment Start:****GIT Start:****SS Train End:****DC End:****Other Project****Team Members:**

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****Data Col Tool****Hardware****DE Software****QC Recording Tool****Incentive****Administration****Payment Type****Payment Method**

SurveyTrak; Illume  
 Blaise 4.8; Illume  
 Laptop; Tablet; [UM cell] Phone; Paper and Pencil  
 Other (Custom Biospecimen Logging Application )  
 Camtasia  
 Yes, R  
 SRO Group  
 Check, post (\$20 (3-Month IW), \$20 (Biospecimen))  
 Check through STRak RPay System

**Report Period**

Mar, 2021 (ECHO)

**Project Phase**

Implementing

**Risk Level**

On Track

**Monthly Update**

Age 4-5 Protocols

We're working with Marsha and Gregg to begin reviewing the REDCap data collection system used for Age 4-5 protocols and assessing requirements for possible integration into SRO systems (e.g. sample management, reporting, QC). We're also exploring REDCap's ability to be administered offline in-person at R's homes (MARCH Cohort).

**Re-Engagement Plan**

Recruitment in 4 prenatal clinics is active and beginning to pick up pace. There have been 58 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. Although the new prenatal protocol allowing women to include their spouse has helped with recruitment, and the ability to recruitment women attending their 2nd prenatal visit, the MSU team believes that prospective participants are weary of the 6-year commitment to the study.

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

**Production Stats**

To date, 905 women have been recruited in clinics. Among those cases, 747 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: 696  
 3-month sample released: 702  
 3-month interviews completed: 501  
 3-month biospecimen collected: 309  
 Average attempts / lw: 7.6  
 lw length: 31.48  
 Response Rate: 72%

**Special Issues**

**Cost**

Apr 15, 2021

**Total Cost to Date (Direct + Indirect):** 202,832.82  
**Estimated Cost at Completion (E\$AC):** 324,449.58  
**Total Budget:** 407,722.00  
**Variance (Budget minus E\$AC):** 83,272.42  
**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've entered a 6 month period of no new cases being released to the 3M protocol until June-July. 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) and 3M project management support 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**

Apr 15, 2021

**Dollars Projected For Month:** 36,667.29  
**Actual Dollars Used:** 31,444.87  
**Variance (Projected minus Actual):** 5,222.42  
**Reason For Variance:**

Illume RDC / DatStat annual payment projected to hit this month, but did not.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>	See Monthly Updates		
<b>Goal at Completion:</b>			
<b>Current actual:</b>			
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

**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 YCR, 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**  
**Data Col Period**  
**Security Plan**  
**Milestone Dates**

04/2018 - 02/2020

03/2019 - 11/2019

NA

**PreProduction Start:**

**Pretest End:**

**Staffing Completed:**

**SS Train Start:**

**DC Start:**

**Pretest Start:**

**Recruitment Start:**

**GIT Start:**

**SS Train End:**

**DC End:**

**Other Project**  
**Team Members:**

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

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

<b>Report Period</b>	Mar, 2021 (EDCPE)	<b>Project Phase</b>	Closing
<b>Risk Level</b>	Some Concerns		
<b>Monthly Update</b>	Production and post production work are complete. Final invoice (still) to be sent to sponsor.		
<b>Special Issues</b>			
<b>Cost</b>			
<b>Feb 28, 2021</b>	<b>Total Cost to Date (Direct + Indirect):</b>	2,626,878.85	
	<b>Estimated Cost at Completion (E\$AC):</b>	2,626,878.85	
	<b>Total Budget:</b>	2,615,353.00	
	<b>Variance (Budget minus E\$AC):</b>	-9,750.92	
	<b>Reason For Variance:</b>	Slight overrun is due to more than expected closeout work associated with phone consents and other data management work. PI Approved an additional ~\$12,000.00 to be paid to SRO which will cover the overrun. Final invoice has not been sent to sponsor as yet.	
<b>Projections</b>			
<b>Feb 28, 2021</b>	<b>Dollars Projected For Month:</b>	-1,864.21	
	<b>Actual Dollars Used:</b>	-1,774.93	
	<b>Variance (Projected minus Actual):</b>	-89.28	
	<b>Reason For Variance:</b>	Some staff time charges (made in error) were reversed. Overrun due to more than expected closeout work. PI has approved payment of funds to cover this overrun (see note above).	

Measures	Units Complete	RR	HPI
	<b>Current Goal:</b> <b>Goal at Completion:</b> <b>Current actual:</b> <b>Estimate at Complete:</b> <b>Variance:</b>		

**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	<table><tr><td>PreProduction Start:</td><td>04/01/2020</td><td>Pretest Start:</td><td></td></tr><tr><td>Pretest End:</td><td></td><td>Recruitment Start:</td><td>04/01/2020</td></tr><tr><td>Staffing Completed:</td><td>06/01/2020</td><td>GIT Start:</td><td></td></tr><tr><td>SS Train Start:</td><td>06/20/2020</td><td>SS Train End:</td><td>07/05/2020</td></tr><tr><td>DC Start:</td><td>08/01/2020</td><td>DC End:</td><td>06/30/2021</td></tr></table>					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:	06/30/2021
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:	06/30/2021																						
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																								

<b>Report Period</b>	Mar, 2021 (EDC-Semi Structured)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	On Track		
<b>Monthly Update</b>	<p>We are a little delayed in getting things finalized for Phase 2, so less was spent last month, more of the prep is going to be done actually in April. We have slightly reduced sample for Phase 2 (129 lines), the PIs want to do some (about 15) interviews themselves to feel closer to the data and so that they can update the interview protocol (paper-based) more readily, using their own experience and the interviewers' feedback. PIs want to try the self-scheduling app 10to8, so we are piloting that on about 30 lines to see if it works well for Rs and interviewers.</p> <p>Phase 2 training is April 19-23. Plan to start production shortly after that.</p>		
<b>Special Issues</b>	None.		

**Cost**  
**Mar 17, 2021**

**Total Cost to Date (Direct + Indirect):** 252,880.00  
**Estimated Cost at Completion (E\$AC):** 379,228.00  
**Total Budget:** 456,620.00  
**Variance (Budget minus E\$AC):** 77,391.00  
**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**  
**Mar 17, 2021**

**Dollars Projected For Month:** 18,106.00  
**Actual Dollars Used:** 16,886.00  
**Variance (Projected minus Actual):** 0.00  
**Reason For Variance:** None

**Measures**

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

**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**

<i>PreProduction Start:</i>	<i>Pretest Start:</i>
<i>Pretest End:</i>	<i>Recruitment Start:</i>
<i>Staffing Completed:</i>	<i>GIT Start:</i>
<i>SS Train Start:</i>	<i>SS Train End:</i>
<i>DC Start:</i>	<i>DC End:</i>

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

**Other Project Names:**

**Sample Mgmt Sys** SurveyTrak

**Data Col Tool** Blaise 4.8

**Hardware** Laptop; [UM cell] Phone

**DE Software** NA

**QC Recording Tool** NA

**Incentive** Yes, R; Yes, INF

**Administration** NA

**Payment Type** Check, prepaid (50); Check, post (25)

**Payment Method** Check through STrak RPay System

**Report Period** Mar, 2021 (HCAP 2020)      **Project Phase** Planning

**Risk Level** Some Concerns

**Monthly Update** A cost estimate of effort for creating a video training of the HCAP test modules which could be used by all of the HCAP sister studies was provided and approved by the PI's and HRS research team. Shortcodes were provided to SRO staff (SSS, SSA, budget analyst, instructional learning staff). Slides of the five tests have been completed and are being reviewed or have been reviewed by a second team member. Some have been sent to and approved by HRS. Project lead is writing a scripts and a trainer guide to go along with the slides. Regarding production start date, we are still on pause due to COVID restrictions for projects with FTF data collection. 2022 is now strongly being



considered by PI staff as a start date, to line up more with HRS start date. The PI's are aware of lead time needed for recruiting, preparations for updating and completing systems development, training, and securing of training venue. At this point the PI's would like to continue with a FTF interview plan, and are not considering 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. The project lead will continue to meet with the PI's on a monthly basis to revisit project Key Dates. Projections will be pushed forward month by month.

**Special Issues**

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

**Cost**

Apr 15, 2021

<b>Total Cost to Date (Direct + Indirect):</b>	182,085.99
<b>Estimated Cost at Completion (E\$AC):</b>	4,140,612.28
<b>Total Budget:</b>	4,488,000.00
<b>Variance (Budget minus E\$AC):</b>	347,387.72
<b>Reason For Variance:</b>	The budget was healthy and was fully funded. We are adding efforts in to benefit the project - see below for detail.

**Projections**

Apr 15, 2021

<b>Dollars Projected For Month:</b>	1,813.91
<b>Actual Dollars Used:</b>	1,834.93
<b>Variance (Projected minus Actual):</b>	21.02
<b>Reason For Variance:</b>	Hours were accurately projected.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b> <b>Goal at Completion:</b> <b>Current actual:</b> <b>Estimate at Complete:</b> <b>Variance:</b>			

**Other Measures**

<b>Project Name</b>	Health and Retirement Study 2020 (HRS 2020)												
<b>Project Mode</b>	Primary: Mixed	Secondary: Web	Total of Modes: 3										
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b> Current										
<b>Budget</b>	<b>Direct Budget:</b> 11,961,346.00	<b>Indirect Budget:</b> 4,306,085.00	<b>Total Budget:</b> 16,267,431.00										
<b>Principal Investigator/Client</b>	David Weir (ISR-SRC)												
<b>Funding Agency</b>													
<b>IRB</b>	<b>HUM#:</b> HUM00061128	<b>Period Of Approval:</b>	10/3/18-10/2/19										
<b>Project Team</b>	<b>Project Lead:</b> Evanthia Leissou <b>Budget Analyst:</b> Richard Warren Krause <b>Production Manager:</b> Andrea Sims <b>Senior Project Advisor:</b> Nicole G Kirgis <b>Production Manager:</b> Jennifer C Arrieta <b>Production Manager:</b> Rebecca Gatward												
<b>Proposal #:</b>	no data												
<b>Description:</b>	<p>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.</p>												
<b>SRO Project Period</b>	01/2019 - 08/2021												
<b>Data Col Period</b>	03/2020 - 03/2021												
<b>Security Plan</b>	NA												
<b>Milestone Dates</b>	<table border="1" style="width: 100%;"> <tr> <td><b>PreProduction Start:</b> 01/01/2019</td> <td><b>Pretest Start:</b> 11/11/2019</td> </tr> <tr> <td><b>Pretest End:</b> 11/23/2019</td> <td><b>Recruitment Start:</b> 09/01/2019</td> </tr> <tr> <td><b>Staffing Completed:</b> 12/15/2019</td> <td><b>GIT Start:</b> 02/17/2020</td> </tr> <tr> <td><b>SS Train Start:</b> 02/19/2020</td> <td><b>SS Train End:</b> 02/26/2020</td> </tr> <tr> <td><b>DC Start:</b> 03/02/2020</td> <td><b>DC End:</b> 05/02/2021</td> </tr> </table>			<b>PreProduction Start:</b> 01/01/2019	<b>Pretest Start:</b> 11/11/2019	<b>Pretest End:</b> 11/23/2019	<b>Recruitment Start:</b> 09/01/2019	<b>Staffing Completed:</b> 12/15/2019	<b>GIT Start:</b> 02/17/2020	<b>SS Train Start:</b> 02/19/2020	<b>SS Train End:</b> 02/26/2020	<b>DC Start:</b> 03/02/2020	<b>DC End:</b> 05/02/2021
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<b>DC Start:</b> 03/02/2020	<b>DC End:</b> 05/02/2021												
<b>Other Project Team Members:</b>	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 Buagella (Lead Project Assistant), Anna Fuqua-Smith (Project Assistant), Janet McBride (Project Assistant), Paul Burton (Stats/Sampling)												
<b>Other Project Names:</b>													
<b>Sample Mgmt Sys</b>	SurveyTrak; MSMS												
<b>Data Col Tool</b>	Blaise 5												
<b>Hardware</b>	Laptop; [UM cell] Phone; Paper and Pencil												
<b>DE Software</b>	Other (Blaise 5 Coding Application); External vendor (DataForce Scanning SAQs)												
<b>QC Recording Tool</b>	Camtasia												
<b>Incentive</b>	Yes, R; Yes, INF												
<b>Administration</b>	NA												
<b>Payment Type</b>	Check, prepaid (80.00); Check, post (\$50); Cash, post (20.00); Other (Money Order (by request))												
<b>Payment Method</b>	Check through STRak RPay System; Check through other system (Rpay system set up for MSMS); Interviewer p												

<b>Report Period</b>	Mar, 2021 (HRS 2020)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	Some Concerns		
<b>Monthly Update</b>	<p>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 FTFs 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. A subset of field sample was moved to web in January and February for a two-week protocol. Once the protocol was completed, the</p>		

non-final cases were moved back to the field.

Production has continued to slow down but interviewers have maintained an average of 20 hours per week ensuring they attempt all workable sample. In an effort to increase response rates, an additional 1,100 respondents were flagged to be offered an additional \$100 upon completion of the interview. Token offers are being made in multiple modes - text, email, voicemail, by phone during contact, self-scheduler, and letter. Interviewers began notifying sending the study ending soon message. SAQ and SSA mailings continued but the protocols changed for a group of sample selected to be mailed the OYMS COVID Mailer in May. Data collection has been extended to May 2, 2021 with a group of 24 interviewers.

The team continued to focus on technical development (as a result of the SAQ/SSA protocol changes), systems testing, coding, IRB submissions, updating goals, mailings, logging, and respondent support.

Measures noted in tables below are as of 4/10 (week 58)

#### 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  
Multiple SAQ/SSA mail protocol changes during data collection.

#### Cost Apr 07, 2021

<b>Total Cost to Date (Direct + Indirect):</b>	14,577,848.94
<b>Estimated Cost at Completion (E\$AC):</b>	15,818,506.55
<b>Total Budget:</b>	16,267,431.00
<b>Variance (Budget minus E\$AC):</b>	448,924.45
<b>Reason For Variance:</b>	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 FTF 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, SAQ and SSA mail protocol, and CASIC rate change have been added.

#### Projections Apr 07, 2021

<b>Dollars Projected For Month:</b>	510,502.31
<b>Actual Dollars Used:</b>	460,904.93
<b>Variance (Projected minus Actual):</b>	49,597.38
<b>Reason For Variance:</b>	Total salary costs were 3% under projections (hours were 2% over) for the month primarily due to an interviewer bonus projected in March that have been pushed forward now to April. Non-salary costs were under projections primarily due to Rpay and shipping. Projections have been reviewed and updated.

#### Measures

	Units Complete	RR	HPI
<b>Current Goal:</b>	16,736	72%	6.1
<b>Goal at Completion:</b>	17,201*	74%	7.0
<b>Current actual:</b>	16,723	72%	6.1
<b>Estimate at Complete:</b>	16,867	73%	6.9
<b>Variance:</b>	334	1%	0.1

#### Other Measures

\*including preferred mode web

<b>Project Name</b>	Health and Wellbeing in Southeast Michigan (H&WB)													
<b>Project Mode</b>	Primary: Face to Face      Total of Modes: 1													
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current										
<b>Budget</b>	<b>Direct Budget:</b>	1,433,860.00	<b>Indirect Budget:</b>	802,964.00 <b>Total Budget:</b> 2,317,801.68										
<b>Principal Investigator/Client</b>	Kristine Ajrouch (Life Course Development Program, SRC) Toni Antonucchi (Life Course Development Program, SRC) Laura Zahodne (Life Course Development Program, SRC)													
<b>Funding Agency</b>														
<b>IRB</b>	<b>HUM#:</b>	HUM00146040	<b>Period Of Approval:</b>	4/9/2020										
<b>Project Team</b>	<b>Project Lead:</b>	Juan Carlos Donoso												
	<b>Budget Analyst:</b>	Parina Kamdar												
	<b>Production Manager:</b>	Theresa Camelo												
	<b>Senior Project Advisor:</b>	Kirsten Haakan Alcser												
	<b>Production Manager:</b>	Ian Ogden												
	<b>Production Manager:</b>	Ian Ogden												
<b>Proposal #:</b>	no data													
<b>Description:</b>	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.													
<b>SRO Project Period</b>	05/2019 - 08/2020													
<b>Data Col Period</b>	11/2019 - 07/2020													
<b>Security Plan</b>	No													
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"><b>PreProduction Start:</b> 05/01/2019</td> <td style="padding: 5px;"><b>Pretest Start:</b> 11/12/2019</td> </tr> <tr> <td style="padding: 5px;"><b>Pretest End:</b> 12/13/2019</td> <td style="padding: 5px;"><b>Recruitment Start:</b> 08/15/2019</td> </tr> <tr> <td style="padding: 5px;"><b>Staffing Completed:</b> 03/01/2021</td> <td style="padding: 5px;"><b>GIT Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>SS Train Start:</b></td> <td style="padding: 5px;"><b>SS Train End:</b></td> </tr> <tr> <td style="padding: 5px;"><b>DC Start:</b> 04/01/2021</td> <td style="padding: 5px;"><b>DC End:</b> 11/30/2021</td> </tr> </table>				<b>PreProduction Start:</b> 05/01/2019	<b>Pretest Start:</b> 11/12/2019	<b>Pretest End:</b> 12/13/2019	<b>Recruitment Start:</b> 08/15/2019	<b>Staffing Completed:</b> 03/01/2021	<b>GIT Start:</b>	<b>SS Train Start:</b>	<b>SS Train End:</b>	<b>DC Start:</b> 04/01/2021	<b>DC End:</b> 11/30/2021
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<b>Other Project Team Members:</b>	Tagh Reid Lovell, Becky Scherr, Kallan Larsen, Dan Zahs, Pam Swanson, Dave Dybicki, Ashwin Dey, Brad Goodwin, John Gawlas, Paul Burton													
<b>Other Project Names:</b>	Alzheimer's Disease Risk and Ethnic Factors: The Case of Arab Americans													
<b>Sample Mgmt Sys</b>	SurveyTrak													
<b>Data Col Tool</b>	Blaise 4.8													
<b>Hardware</b>	Laptop; [UM cell] Phone; Paper and Pencil													
<b>DE Software</b>	Other (Weblog possibly)													
<b>QC Recording Tool</b>	DRI-CARI; Camtasia													
<b>Incentive</b>	Yes, R; Yes, INF													
<b>Administration</b>	SRO Group													
<b>Payment Type</b>	Cash, prepaid (\$60, \$15)													
<b>Payment Method</b>	Interviewer payment of cash (reimbursed/reconciled via Tenrox)													

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<b>Report Period</b>	Mar, 2021 (H&WB)	<b>Project Phase</b>	Planning
<b>Risk Level</b>	Some Concerns		
<b>Monthly Update</b>	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:

Taghreed Lovell was initially budgeted as a production assistant at approximately .6 FTE. A few months ago it became clear that Taghreed'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, Taghreed was promoted to production manager, in part because of her amazing contributions to D-AMP. The current cost report reflects Taghreed'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**  
**Mar 31, 2021**

<b>Total Cost to Date (Direct + Indirect):</b>	1,002,922.00
<b>Estimated Cost at Completion (E\$AC):</b>	2,365,996.00
<b>Total Budget:</b>	2,317,801.68
<b>Variance (Budget minus E\$AC):</b>	-78,194.00
<b>Reason For Variance:</b>	

The projected overrun increased because of 2022 salary increases.

**Projections**  
**Mar 31, 2021**

<b>Dollars Projected For Month:</b>	0.00
<b>Actual Dollars Used:</b>	6,377.00
<b>Variance (Projected minus Actual):</b>	-6,377.00
<b>Reason For Variance:</b>	

Hours charged to the wrong project. We have asked the people who charged to please change their hours to DAWN-CS

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>			
<b>Goal at Completion:</b>			
<b>Current actual:</b>			
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

**Other Measures**

<b>Project Name</b>	Housing & Children (HCDC, H&C)													
<b>Project Mode</b>	Primary: Face to Face      Total of Modes: 1													
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current										
<b>Budget</b>	<b>Direct Budget:</b>	9,806,418.00	<b>Indirect Budget:</b>	2,236,640.00 <b>Total Budget:</b> 12,043,058.00										
<b>Principal Investigator/Client</b>	Sandra Newman (Johns Hopkins University) Tama Leventhal (Tufts University)													
<b>Funding Agency</b>	NICHD, HUD, RWJ Foundation, MacArthur Foundation													
<b>IRB</b>	<b>HUM#:</b>	HUM00114794	<b>Period Of Approval:</b>											
<b>Project Team</b>	<b>Project Lead:</b>	Barbara Lohr Ward												
	<b>Budget Analyst:</b>	Parina Kamdar												
	<b>Production Manager:</b>	Veronica Connors-Burge												
	<b>Senior Project Advisor:</b>	Grant D Benson												
	<b>Production Manager:</b>	Becky Kay Scherr												
	<b>Production Manager:</b>	Carlos Andres Macuada Lopez												
<b>Proposal #:</b>	no data													
<b>Description:</b>	<p>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.</p> <p>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.</p>													
<b>SRO Project Period</b>	04/2016 - 02/2020													
<b>Data Col Period</b>	05/2017 - 09/2018													
<b>Security Plan</b>	NA													
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"><b>PreProduction Start:</b> 09/01/2018</td> <td style="padding: 5px;"><b>Pretest Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>Pretest End:</b></td> <td style="padding: 5px;"><b>Recruitment Start:</b> 09/01/2019</td> </tr> <tr> <td style="padding: 5px;"><b>Staffing Completed:</b> 03/01/2020</td> <td style="padding: 5px;"><b>GIT Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>SS Train Start:</b> 08/18/2020</td> <td style="padding: 5px;"><b>SS Train End:</b> 08/21/2020</td> </tr> <tr> <td style="padding: 5px;"><b>DC Start:</b> 08/24/2020</td> <td style="padding: 5px;"><b>DC End:</b> 02/06/2021</td> </tr> </table>				<b>PreProduction Start:</b> 09/01/2018	<b>Pretest Start:</b>	<b>Pretest End:</b>	<b>Recruitment Start:</b> 09/01/2019	<b>Staffing Completed:</b> 03/01/2020	<b>GIT Start:</b>	<b>SS Train Start:</b> 08/18/2020	<b>SS Train End:</b> 08/21/2020	<b>DC Start:</b> 08/24/2020	<b>DC End:</b> 02/06/2021
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<b>DC Start:</b> 08/24/2020	<b>DC End:</b> 02/06/2021													
<b>Other Project Team Members:</b>	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													

<b>Other Project Names:</b>	Housing & Children's Healthy Development
<b>Sample Mgmt Sys</b>	SurveyTrak; SMS; Illume
<b>Data Col Tool</b>	Blaise 4.8; SAQ
<b>Hardware</b>	Laptop; Desktop; [UM cell] Phone; Paper and Pencil; Other (laser measurement device)
<b>DE Software</b>	Blaise 4.8 BIA ; External vendor (CASO - scanning)
<b>QC Recording Tool</b>	DRI-CARI
<b>Incentive</b>	Yes, R; Yes, INF; Yes, Other (screening households)
<b>Administration</b>	SRO Group
<b>Payment Type</b>	Cash, prepaid (\$5 prenotification Wave 2); Cash, post (\$75 adult, \$50 child (Wave 1)); Other (child gift <\$5, Fir
<b>Payment Method</b>	Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office;

<b>Report Period</b>	Mar, 2021 (HCDC, H&C)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	<i>On Track</i>		
<b>Monthly Update</b>	<p>Task 1: Management, Budget and Work Plan</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> <li>• Participated in biweekly project meetings with research team to discuss scope, cost projections and schedule.</li> <li>• Proposed initial panel maintenance work scope</li> <li>• Reviewed/monitored project expenses. Revised and adjusted monthly projections.</li> <li>• Monitored subcontracts, project invoicing and payments.</li> <li>o Prepared monthly spending estimates for each Task Order</li> <li>o Negotiated with Johns Hopkins regarding projected invoicing plan</li> <li>• Prepared and delivered biweekly production reports.</li> <li>• Managed production activities necessary to support field interviewing and Social Security form data collection:</li> <li>o Kitted and executed mailings for Social Security form kits</li> <li>o Logged and scanned incoming Social Security forms.</li> <li>o Managed respondent payments</li> <li><input type="checkbox"/> Mailed respondent incentives; reconciled cash/gift card funds.</li> <li><input type="checkbox"/> Received and logged undelivered incentives; contacted respondents and re-mailed incentives</li> <li><input type="checkbox"/> Requested new gift cards.</li> <li>• Updated sample management system with address updates received from respondents.</li> <li>• Final Deliverables</li> <li>o Held weekly meetings to discuss the design and delivery of final deliverables</li> <li>o Finalized final report format</li> <li>o Continued review of data files (see Final Data Deliverables for more detail)</li> <li>• Edited specs for prospective panel maintenance and Wave 3 of data collection</li> </ul> <p>Task 2: Sampling</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> <li>• Attended project meetings.</li> <li>• Processed weighting adjustments</li> <li>• Imputed PI determined key statistics for use in non-response modeling and weighting calibration</li> <li>• Created flow charts summarizing production</li> <li>• Calculated response rates</li> </ul> <p>Task 3: Questionnaire Development</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> <li>• No activity this month</li> </ul> <p>Task 4: CAI Programming</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> <li>• Updated questionnaire documentation to correct variable names, document various Blaise data-model releases</li> </ul> <p>Task 5: Systems Programming</p> <p>% Task Spent to date</p> <ul style="list-style-type: none"> <li>• Updated sample management system and reports as needed to support administrative records collection</li> </ul> <p>Tasks 6, 7: Interviewer Recruitment &amp; Hiring, Training</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> <li>• No activity this month</li> </ul> <p>Task 8: Main Data Collection</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> <li>• Managed respondent payments</li> </ul>		



- 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.
- ☐ Third Packet for cohort 2
- ☐ Second Packet for cohort 3
- 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 Continued reminder/assistance calling effort for SSN/Records-matching mailings
- ☐ Reminders issued in March across cohorts: 588

#### Task 9: Post Collection Processing

##### % Task Spent to Date

- Continued reviewing open-ended responses and interview remarks.
- Processed data in anticipation of second interim data delivery

#### Task 10: Weighting

##### % Task Spent to Date

- See Task 2 Sampling for other activities

#### Task 11: Final Data Deliverables

##### % Task Spent to Date

- Continued preparation and review of data files
- Developed outline for final report
- Finalized specifications for full data delivery
- Delivered initial and second interim data deliveries
- 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 subsequent billing from USPS may impact the timing of receipt of final charges for incoming Business Reply Mail.
- Assuming that SRO has the use of all awarded NICHD funds, the project is projecting an underrun estimated between \$55,000 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**  
**Apr 16, 2021**

**Total Cost to Date (Direct + Indirect):** 11,671,434.10  
**Estimated Cost at Completion (E\$AC):** 11,952,375.22  
**Total Budget:** 12,043,058.00  
**Variance (Budget minus E\$AC):** 90,682.78  
**Reason For Variance:** NICHD authorized additional funding to cover an extension of data collection and panel maintenance post-data collection.

**Projections**  
**Apr 16, 2021**

**Dollars Projected For Month:** 151,303.79  
**Actual Dollars Used:** 129,135.21  
**Variance (Projected minus Actual):** 22,168.58  
**Reason For Variance:** Approximately \$12,000 in respondent payments expected to hit this month did not. Overprojected interviewer hours and various staff hours.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>	1041 PCG iws	75% of located cases	8.5
<b>Goal at Completion:</b>	1041 PCG iws	75% of located cases	
<b>Current actual:</b>	1413	79%	9.0
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

**Other Measures**

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

<b>Project Name</b>	HRS 2020 COVID Antibody Test (HRS 2020 ABT)													
<b>Project Mode</b>	Primary: Mail      Total of Modes: 1													
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current										
<b>Budget</b>	<b>Direct Budget:</b>	601,330.00	<b>Indirect Budget:</b>	216,479.00 <b>Total Budget:</b> 817,809.00										
<b>Principal Investigator/Client</b>	David Weir (SRC) Jessica Faul (SRC)													
<b>Funding Agency</b>	NIH													
<b>IRB</b>	<b>HUM#:</b>	HUM00061128	<b>Period Of Approval:</b>	8/20/20-8/19/21										
<b>Project Team</b>	<b>Project Lead:</b> Evanthia Leissou <b>Budget Analyst:</b> Richard Warren Krause <b>Production Manager:</b> Lloyd Fate Hemingway <b>Senior Project Advisor:</b> Nicole G Kirgis <b>Production Manager:</b> Jennifer C Arrieta <b>Production Manager:</b> Derek Dubuque													
<b>Proposal #:</b>	no data													
<b>Description:</b>	<p>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.</p>													
<b>SRO Project Period</b>	09/2020 - 04/2021													
<b>Data Col Period</b>	10/2020 - 03/2021													
<b>Security Plan</b>	NA													
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"><b>PreProduction Start:</b> 09/01/2020</td> <td style="padding: 5px;"><b>Pretest Start:</b> 10/09/2020</td> </tr> <tr> <td style="padding: 5px;"><b>Pretest End:</b> 10/15/2020</td> <td style="padding: 5px;"><b>Recruitment Start:</b> 09/22/2020</td> </tr> <tr> <td style="padding: 5px;"><b>Staffing Completed:</b> 01/15/2021</td> <td style="padding: 5px;"><b>GIT Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>SS Train Start:</b> 01/25/2021</td> <td style="padding: 5px;"><b>SS Train End:</b></td> </tr> <tr> <td style="padding: 5px;"><b>DC Start:</b> 10/19/2020</td> <td style="padding: 5px;"><b>DC End:</b> 03/31/2021</td> </tr> </table>				<b>PreProduction Start:</b> 09/01/2020	<b>Pretest Start:</b> 10/09/2020	<b>Pretest End:</b> 10/15/2020	<b>Recruitment Start:</b> 09/22/2020	<b>Staffing Completed:</b> 01/15/2021	<b>GIT Start:</b>	<b>SS Train Start:</b> 01/25/2021	<b>SS Train End:</b>	<b>DC Start:</b> 10/19/2020	<b>DC End:</b> 03/31/2021
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<b>DC Start:</b> 10/19/2020	<b>DC End:</b> 03/31/2021													
<b>Other Project Team Members:</b>	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.													
<b>Other Project Names:</b>	HRS Antibody, Antibody Project													
<b>Sample Mgmt Sys</b>	MSMS													
<b>Data Col Tool</b>	Other (COVID Antibody Saliva Kit, Paper/Pencil )													
<b>Hardware</b>	Laptop; Desktop; [UM cell] Phone; Paper and Pencil													
<b>DE Software</b>	Other (MSMS)													
<b>QC Recording Tool</b>	N/A													
<b>Incentive</b>	Yes, R													
<b>Administration</b>	SRO Group													
<b>Payment Type</b>	Check, prepaid (\$20)													
<b>Payment Method</b>	Check through STRak RPay System													

<b>Report Period</b>	Mar, 2021 (HRS 2020 ABT)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	Some Concerns		
<b>Monthly Update</b>	All test kits were mailed out by December 20, 2020 and all reminder postcards mailed by January 7, 2021. Reminder		

calling continued through mid-March.

Minnesota had a delay in delivering results due to a backorder of extraction kits and the need to re-analyze some samples. Consent logging and result letter mailings continued through the month. The team continued to work closely with the ISR Biospecimen lab to ensure replacement kits, requested by respondents during reminder calling, we shipped out in a timely fashion.

As of 4/13/21 the overall response rate was at 43% (see details below)

Original sample selected=17,639

Sample removed from kit mailing = 1,351

Total Sample Sent A Kit = 16,288

Samples received by MN: 7,084 (43%)

Refusals: 1,785 (11%)

Deceased: 108 (1%)

Received Vaccine: 411 (2%)

Undeliverable - No Forwarding Address: 110 (1%)

Pending response: 6,790 (42%)

#### 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. Additional sample added in February.

MN lab doing additional analysis/quality checks on samples and back-order on extraction tubes which are delaying results being sent to respondents.

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

#### Cost

Apr 07, 2021

**Total Cost to Date (Direct + Indirect):** 873,298.32

**Estimated Cost at Completion (E\$AC):** 792,263.00

**Total Budget:** 817,809.00

**Variance (Budget minus E\$AC):** 25,546.00

**Reason For Variance:**

Cost to Date includes the cost of all checks issued for respondent incentives. We expect 20% of checks will be voided and have projected this reduction in cost, which is reflected in Cost at Completion. We are estimating a \$25,546 underrun. 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 projections for additional sample has been added to the projections. Logging and result letter mailing projections have been extended into May. CASIC rate change from \$2.01 to \$2.50 has been applied in CRS.

#### Projections

Apr 07, 2021

**Dollars Projected For Month:** 52,037.47

**Actual Dollars Used:** 73,811.83

**Variance (Projected minus Actual):** -21,774.36

**Reason For Variance:**

The variance is primarily due to the timing of the field interviewer hours biweekly pay period.

#### Measures

	Units Complete	RR	HPI
<b>Current Goal:</b>			
<b>Goal at Completion:</b>	10,587	65%	
<b>Current actual:</b>	7,084	43%	
<b>Estimate at Complete:</b>	7,084	43%	
<b>Variance:</b>	3,503	22%	

#### Other Measures

<b>Project Name</b>	HRS 2021 Off-Year Mail Study (HRS 2021 OYMS / COVID Survey)					
<b>Project Mode</b>	Primary: Mail      Total of Modes: 1					
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current		
<b>Budget</b>	<b>Direct Budget:</b>	543,273.00	<b>Indirect Budget:</b>	195,580.00 <b>Total Budget:</b> 738,853.00		
<b>Principal Investigator/Client</b>	Dr. David Weir (UM-ISR (SRC-HRS)) Dr. Helen Levy (UM-ISR (SRC-HRS))					
<b>Funding Agency</b>	National Institutes of Health (NIH)					
<b>IRB</b>	<b>HUM#:</b>	HUM00196577	<b>Period Of Approval:</b>			
<b>Project Team</b>	<b>Project Lead:</b>	Ian Ogden				
	<b>Budget Analyst:</b>	Grace Tison				
	<b>Production Manager:</b>	Pooja Varma-Laughlin				
	<b>Senior Project Advisor:</b>	Evanthia Leissou				
	<b>Production Manager:</b>	Ian Ogden				
	<b>Production Manager:</b>					
<b>Proposal #:</b>	no data					
<b>Description:</b>	<p>This project refers to what will be the first of up to three HRS mail studies planned for the 2020-2022 off-year. Following the model of past off-year mail studies, a subsample of 14,000 HRS respondents will be sent a paper booklet, as well as a prepaid incentive by check, and will be asked to complete the paper survey and mail back to Ann Arbor via prepaid return materials. Logging of paper booklets will take place in Ann Arbor, where booklets will be packaged and shipped to an external vendor, DataForce, for scanning and data-export. This study will follow a Dillman-like reminder sequence - initial mailing, followed by up to three reminder mailings (booklet #2, postcard, booklet #3).</p> <p>An external vendor, DataForce, will handle (1) formatting, printing and mailing of the booklet (in English and Spanish); (2) sending reminder mailings to each batch of sample; and (3) scanning completed booklets and delivering data to SRO for processing and delivery.</p> <p>Unlike past instances of HRS off-year mail studies, the 2021 COVID Survey sample is expected to be split into between two and four batches (each with its own mailing and reminder schedule). This is due to the timing of this study and other ongoing HRS components. Secondly, and also in contrast with past off-year mail studies, it is expected that this sample may overlap with HRS CAMS.</p>					
<b>SRO Project Period</b>	03/2021 - 12/2021					
<b>Data Col Period</b>	05/2021 - 12/2021					
<b>Security Plan</b>	NA					
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> <b>PreProduction Start:</b> 03/01/2021  <b>Pretest End:</b>  <b>Staffing Completed:</b>  <b>SS Train Start:</b> 05/21/2021  <b>DC Start:</b> 05/17/2021 </td> <td style="padding: 5px;"> <b>Pretest Start:</b>  <b>Recruitment Start:</b>  <b>GIT Start:</b>  <b>SS Train End:</b> 05/21/2021  <b>DC End:</b> 12/31/2021 </td> </tr> </table>				<b>PreProduction Start:</b> 03/01/2021 <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> 05/21/2021 <b>DC Start:</b> 05/17/2021	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> 05/21/2021 <b>DC End:</b> 12/31/2021
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<b>Other Project Team Members:</b>	Technical Lead: Andrew Hupp MSMS Developer: Pam Swanson Data Manager: Laura Yoder Project Assistant (RPay): Anna Fuqua-Smith Project Assistant (Other): TBD					
<b>Other Project Names:</b>	HRS 2021 Off-Year Mail Study HRS 2021 OYMS (COVID) HRS 2021 COVID Survey SurveyTrak, MSMS					
<b>Sample Mgmt Sys</b>	HRS 2021 Perspectives on the Pandemic Survey					
<b>Data Col Tool</b>	NA					
<b>Hardware</b>	Paper and Pencil					
<b>DE Software</b>	Other (MSMS DCA Logging Interface)					
<b>QC Recording Tool</b>	N/A					
<b>Incentive</b>	Yes, R					
<b>Administration</b>	SRO Group					
<b>Payment Type</b>	Check, prepaid					
<b>Payment Method</b>	Check through STrak RPay System					

**Report Period** Mar, 2021 (HRS 2021 OYMS / COVID 19) **Project Phase** Planning

**Risk Level** On Track

**Monthly Update** [Questionnaire and Material Development / IRB]

All respondent-facing materials have been developed, translated and were submitted to the IRB on 4/14/2021 (with a late-breaking specification change requiring a brief edit-and-resubmission on Friday, 4/16/2021). Our target production-launch date of mid-May will require relatively-quick turnaround from the IRB; pushing back to late-May may be necessary. Key next steps include: (1) finalizing formatted SAQs and (2) developing the survey schema.

[Technical Systems]

Technical discussions are ongoing and ramping up, with a programmer and data manager now engaged. We are discussing refinements to day-to-day logging in order to process the volume we are anticipating (1000-1400 returned booklets per week for 8-10 weeks in June and July, 2021). Key next steps include: (1) Confirming viability of a "fast-lane" logging process; (2) Finalizing MSMS protocol and logging interface; (3) Preparing for mail-merge of initial mailing.

[Staff and Space Resources]

With the anticipated volume of 1000-1400 returned booklets per week in mind, active planning of space and staff resources for (1) storage; (2) active logging & QC, and (3) shipment processing are underway. Logging recruitment has assumed 2-3 minutes per logged booklet; however, if some of our process-refinements are successful, this number may be lower. This is something we are discussing and will be monitoring carefully to ensure projections are kept up date and staffing is matched to project needs.

**Special Issues**

(1) Due to reports of USPS service issues, this project will forgo USPS Priority as the service used for the final reminder mailing and will rely on a service for return materials for the first mailing. This will allow us to track the returns from mailing #1 (as well as overcome an incidental barrier of the more typical Business-Reply service). Otherwise, our mail-service plans are unchanged (outgoing First-Class; return via Business Reply).

(2) As this is a larger mail study than SRO staff have processed since ~2017, and the largest since COVID workplace restrictions went into effect, impacts of needs to maintain social distance and rotate staff into and out of the Perry Building are not fully known.

**Cost**  
**Apr 15, 2021**

**Total Cost to Date (Direct + Indirect):** 4,700.43

**Estimated Cost at Completion (E\$AC):** 883,060.69

**Total Budget:** 738,853.00

**Variance (Budget minus E\$AC):** -144,202.69

**Reason For Variance:**

The initial budget for this project was prepared in 2017 as part of the six-year HRS renewal (2018-2022). The assumptions made at that time reflected best-available information regarding the size and design of the 2020-22 off-year mail studies. The overall projections have been updated to (1) reflect a 22% larger sample size (14,800 vs. the budgeted 12,000), (2) increased salary and non-salary costs per current rates.

**Projections**  
**Apr 15, 2021**

**Dollars Projected For Month:** 7,896.66

**Actual Dollars Used:** 4,700.43

**Variance (Projected minus Actual):** 3,196.23

**Reason For Variance:**

Projections had assumed a potential production-launch as early as late-April. However, as project planning began in earnest, a launch of mid-late May became the updated target. Hours not used in March, 2020 (technical and application development, project support) will be pushed forward.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>	11,300	80.0%	N/A
<b>Goal at Completion:</b>			
<b>Current actual:</b>	--	--	
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

**Other Measures**

<b>Project Name</b>	India Human Development Survey Wave 3 (IHDS3)													
<b>Project Mode</b>	Primary: Face to Face	Secondary: Telephone	Total of Modes: 2											
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current										
<b>Budget</b>	<b>Direct Budget:</b>	333,895.61	<b>Indirect Budget:</b>	198,006.92										
			<b>Total Budget:</b>	531,902.53										
<b>Principal Investigator/Client</b>	Sonalde Desai (University of Maryland) Stephanie Chardoul (University of Michigan ) Santanu Pramanik (National Council of Applied Economic Research)													
<b>Funding Agency</b>	National Institutes of Health, Department of Health and Human Services													
<b>IRB</b>	<b>HUM#:</b>		<b>Period Of Approval:</b>											
<b>Project Team</b>	<b>Project Lead:</b>	Gina-Qian Yang Cheung												
	<b>Budget Analyst:</b>	Carl S Remmert												
	<b>Production Manager:</b>													
	<b>Senior Project Advisor:</b>	Stephanie A Chardoul												
	<b>Production Manager:</b>	Sarah Elisa Broumand												
	<b>Production Manager:</b>	Jennifer M Kelley												
<b>Proposal #:</b>	no data													
<b>Description:</b>	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.													
<b>SRO Project Period</b>	01/2019 - 05/2022													
<b>Data Col Period</b>	06/2020 - 05/2022													
<b>Security Plan</b>	NA													
<b>Milestone Dates</b>	<table border="1"> <tr> <td><b>PreProduction Start:</b></td> <td><b>Pretest Start:</b></td> </tr> <tr> <td><b>Pretest End:</b></td> <td><b>Recruitment Start:</b></td> </tr> <tr> <td><b>Staffing Completed:</b></td> <td><b>GIT Start:</b></td> </tr> <tr> <td><b>SS Train Start:</b></td> <td><b>SS Train End:</b></td> </tr> <tr> <td><b>DC Start:</b></td> <td><b>DC End:</b></td> </tr> </table>				<b>PreProduction Start:</b>	<b>Pretest Start:</b>	<b>Pretest End:</b>	<b>Recruitment Start:</b>	<b>Staffing Completed:</b>	<b>GIT Start:</b>	<b>SS Train Start:</b>	<b>SS Train End:</b>	<b>DC Start:</b>	<b>DC End:</b>
<b>PreProduction Start:</b>	<b>Pretest Start:</b>													
<b>Pretest End:</b>	<b>Recruitment Start:</b>													
<b>Staffing Completed:</b>	<b>GIT Start:</b>													
<b>SS Train Start:</b>	<b>SS Train End:</b>													
<b>DC Start:</b>	<b>DC End:</b>													
<b>Other Project Team Members:</b>	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 Sciborski  DBA Team LihShwu Ke Cheng Zhou													



**Other Project****Names:**

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

<b>Report Period</b>	Mar, 2021 (IHDS3)	<b>Project Phase</b>	Implementing																								
<b>Risk Level</b>	<i>On Track</i>																										
<b>Monthly Update</b>	We are using the different fund to cover the development work, and this fund will be reserved for the production management																										
<b>Special Issues</b>	<p>There are several concerns, with the foremost as the timeline, given the size and complexity of the project. The other concerns include:</p> <ul style="list-style-type: none"> <li>● Receiving timely translations from the client <ul style="list-style-type: none"> <li>○ Mitigation: conducted a BTT training this month and continue to communicate back and forth to make sure they understand how to use the system.</li> </ul> </li> <li>● 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. <ul style="list-style-type: none"> <li>○ Mitigation: <ul style="list-style-type: none"> <li>■ 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</li> <li>■ The Field User Management tool was develop to give the NCAER staff more responsibilities for certain data management tasks</li> <li>■ Continue to working closely with NCAER to keep the timeline on track to avoid unnecessary rework</li> </ul> </li> </ul> </li> </ul>																										
<b>Cost</b>	<p><b>Total Cost to Date (Direct + Indirect):</b> 487,294.82</p> <p><b>Estimated Cost at Completion (E\$AC):</b> 511,133.35</p> <p><b>Total Budget:</b> 531,902.53</p> <p><b>Variance (Budget minus E\$AC):</b> 246,751.18</p> <p><b>Reason For Variance:</b> 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.</p>																										
<b>Projections</b>	<p><b>Dollars Projected For Month:</b> 765.92</p> <p><b>Actual Dollars Used:</b> 369.74</p> <p><b>Variance (Projected minus Actual):</b> 396.18</p> <p><b>Reason For Variance:</b> Implementation phase got extended. Froze the House Hold project at the end of November.</p>																										
<b>Measures</b>	<table border="1"> <thead> <tr> <th></th><th>Units Complete</th><th>RR</th><th>HPI</th></tr> </thead> <tbody> <tr> <td><b>Current Goal:</b></td><td></td><td></td><td></td></tr> <tr> <td><b>Goal at Completion:</b></td><td></td><td></td><td></td></tr> <tr> <td><b>Current actual:</b></td><td></td><td></td><td></td></tr> <tr> <td><b>Estimate at Complete:</b></td><td></td><td></td><td></td></tr> <tr> <td><b>Variance:</b></td><td></td><td></td><td></td></tr> </tbody> </table>				Units Complete	RR	HPI	<b>Current Goal:</b>				<b>Goal at Completion:</b>				<b>Current actual:</b>				<b>Estimate at Complete:</b>				<b>Variance:</b>			
	Units Complete	RR	HPI																								
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<b>Goal at Completion:</b>																											
<b>Current actual:</b>																											
<b>Estimate at Complete:</b>																											
<b>Variance:</b>																											
<b>Other Measures</b>																											

<b>Project Name</b>	Malaysia Ageing and Retirement Study Wave 2 (MARS 2)				
<b>Project Mode</b>	Primary: Face to Face	Secondary: Telephone	Total of Modes: 2		
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current		
<b>Budget</b>	<b>Direct Budget:</b> 187,281.00	<b>Indirect Budget:</b> 67,421.00	<b>Total Budget:</b> 254,702.00		
<b>Principal Investigator/Client</b>	David Weir (UM SRC - HRS)				
<b>Funding Agency</b>	Health and Retirement Study				
<b>IRB</b>	<b>HUM#:</b> NA	<b>Period Of Approval:</b>			
<b>Project Team</b>	<b>Project Lead:</b> Margaret Lee Hudson <b>Budget Analyst:</b> Richard Warren Krause <b>Production Manager:</b> <b>Senior Project Advisor:</b> Evanthia Leissou <b>Production Manager:</b> Kasyera Kowalczyk <b>Production Manager:</b>				
<b>Proposal #:</b>	no data				
<b>Description:</b>	<p>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.</p>				
<b>SRO Project Period</b>	01/2020 - 09/2021				
<b>Data Col Period</b>	09/2020 - 08/2021				
<b>Security Plan</b>	NA				
<b>Milestone Dates</b>	<table border="1" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> <b>PreProduction Start:</b>  <b>Pretest End:</b>  <b>Staffing Completed:</b>  <b>SS Train Start:</b>  <b>DC Start:</b> </td> <td style="width: 50%; vertical-align: top;"> <b>Pretest Start:</b>  <b>Recruitment Start:</b>  <b>GIT Start:</b>  <b>SS Train End:</b>  <b>DC End:</b> </td> </tr> </table>			<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b>	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>
<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b>	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>				
<b>Other Project Team Members:</b>	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)				
<b>Other Project Names:</b>					
<b>Sample Mgmt Sys</b>	Other (ST International)				
<b>Data Col Tool</b>	Blaise 4.8				
<b>Hardware</b>	Laptop				
<b>DE Software</b>	NA				
<b>QC Recording Tool</b>	N/A				
<b>Incentive</b>	Not used				
<b>Administration</b>	N/A				
<b>Payment Type</b>	N/A				
<b>Payment Method</b>	N/A				

**Risk Level**

On Track

**Monthly Update**

A small third interviewer training is planned for mid-April to bring on a few more staff to complete interviews in the east of the county. The training will be handled remotely due to movement control orders in place in that region. Movement control orders in the rest of the country are being lifted and the focus will be on completing physical measurements on the ~500 Rs who have already completed the rest of the IW via telephone. One of the SWRC team members is leaving the organization at the beginning of April. Jay and Brad have been working with her and the rest of the SWRC team to support the transition. The SWRC team is working on a stakeholder report/update and SRO provided a summary of our support for their documentation.

**Special Issues****Cost**

Apr 15, 2021

<b>Total Cost to Date (Direct + Indirect):</b>	183,435.33
<b>Estimated Cost at Completion (E\$AC):</b>	233,479.89
<b>Total Budget:</b>	254,702.00
<b>Variance (Budget minus E\$AC):</b>	21,222.11
<b>Reason For Variance:</b>	Lack of international travel, lower TSG needs that budgeted (fewer ST, WT, and Blaise changes needed)

**Projections**

Apr 15, 2021

<b>Dollars Projected For Month:</b>	7,853.67
<b>Actual Dollars Used:</b>	5,463.24
<b>Variance (Projected minus Actual):</b>	2,390.43
<b>Reason For Variance:</b>	No WTrak changes needed, Blaise specs from project team delayed so programming will be in April for next data model release.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b> <b>Goal at Completion:</b> <b>Current actual:</b> <b>Estimate at Complete:</b> <b>Variance:</b>			

**Other Measures**

<b>Project Name</b>	Mellon College and Beyond II (CBII)		
<b>Project Mode</b>	Primary: Web      Total of Modes: 1		
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current
<b>Budget</b>	<b>Direct Budget:</b> 643,762.00	<b>Indirect Budget:</b> 0.00	<b>Total Budget:</b> 643,762.00
<b>Principal Investigator/Client</b>	Paul Courant (Gerald R Ford School of Public Policy) Kevin Stange (Gerald R Ford School of Public Policy) Susan Jekielek (ICPSR)		
<b>Funding Agency</b>			
<b>IRB</b>	<b>HUM#:</b> 00173324	<b>Period Of Approval:</b>	10/2020-10/2021
<b>Project Team</b>	<b>Project Lead:</b> Maureen Joan O'Brien <b>Budget Analyst:</b> Carl S Remmert <b>Production Manager:</b> Lisa J Carn <b>Senior Project Advisor:</b> Nicole G Kirgis <b>Production Manager:</b> James Koopman <b>Production Manager:</b>		
<b>Proposal #:</b>	no data		
<b>Description:</b>	TBD		
<b>SRO Project Period</b>	10/2020 - 10/2021		
<b>Data Col Period</b>	01/2021 - 06/2021		
<b>Security Plan</b>	NA		
<b>Milestone Dates</b>	<div> <div> <b>PreProduction Start:</b> 10/15/2020  <b>Pretest End:</b>  <b>Staffing Completed:</b> 12/15/2020  <b>SS Train Start:</b> 02/18/2021  <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>  <b>Recruitment Start:</b> 11/15/2020  <b>GIT Start:</b>  <b>SS Train End:</b> 02/18/2021  <b>DC End:</b> </div> </div>		
<b>Other Project Team Members:</b>	Peter Batra - Programmer and technical lead, former MCBII Pilot Lead, Laura Yoder - Data Ops, Dave Dybicki - Systems Programmer, Grace Tison, 2nd Budget Analyst		
<b>Other Project Names:</b>			
<b>Sample Mgmt Sys</b>	SMS		
<b>Data Col Tool</b>	Illume		
<b>Hardware</b>	Laptop; [UM cell] Phone		
<b>DE Software</b>	NA		
<b>QC Recording Tool</b>	NA		
<b>Incentive</b>	Yes, R		
<b>Administration</b>	SRO Group		
<b>Payment Type</b>	Check, post (30)		
<b>Payment Method</b>	NA		

<b>Report Period</b>	Mar, 2021 (CBII)	<b>Project Phase</b>	Implementing
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<b>Risk Level</b>	On Track
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<b>Monthly Update</b>	<p>There are approximately 10 weeks of data collection left with 592 interviews needed to reach the goal of 3,000 completed interviews. 2,258 completed interviews and 150 partials. Just over 4,100 sample lines have been attempted in reminder calling, with 5,520 call attempts. 135 surveys have been completed after having been contacted by reminder callers, and currently 84 sample lines have agreed during a reminder call to complete the survey. The manual locating effort has not yet started, manual locators are focusing effort on reminder calling. 160 sample lines are ready to have manual locating when the effort starts. Occupation/industry coding is underway as well, with 1991 cases having been coded and 1476 checked. The third email reminder has been sent. Email reminders 4 &amp; 5 have not yet been sent. Email reminder will likely go out the week of 4/18/21. The project is considering sending already IRB approved text message reminders that include the survey link to R's whose phone numbers we have confirmed but have not yet completed. The research team is a bit concerned about quality of data when the survey is accessed via smartphone, so may want to wait until it is a last resort. Many R's have already completed via smartphone and we are able to determine which R's those were. We are monitoring sample balance</p>
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for minorities, liberal arts, and institution, to see if they are close to their proportion to the total sample. CUNY and all minority sample is currently prioritized in an attempt to increase their RR's.

### Special Issues

<b>Cost</b> <b>Apr 15, 2021</b>	<b>Total Cost to Date (Direct + Indirect):</b>	276,714.49	
	<b>Estimated Cost at Completion (E\$AC):</b>	633,445.22	
	<b>Total Budget:</b>	643,762.00	
	<b>Variance (Budget minus E\$AC):</b>	10,316.78	
	<b>Reason For Variance:</b>	Some non-salary costs, mostly tokens of appreciation, were not used and pushed forward.	

<b>Projections</b> <b>Apr 15, 2021</b>	<b>Dollars Projected For Month:</b>	139,451.56	
	<b>Actual Dollars Used:</b>	108,934.90	
	<b>Variance (Projected minus Actual):</b>	30,516.66	
	<b>Reason For Variance:</b>	Non-salary costs were projected high for this month, so were lowered a bit and some moved forward - mostly respondent toa's.	

<b>Measures</b>			
	<b>Units Complete</b>	<b>RR</b>	<b>HPI</b>
<b>Current Goal:</b>			
<b>Goal at Completion:</b>	3000	20%	
<b>Current actual:</b>	2408	16	
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

### Other Measures

<b>Project Name</b>	Monitoring the Future - Base Year 2017-2022 (MTF base year 2017-2022)												
<b>Project Mode</b>	Primary: Class SAQ      Total of Modes: 1												
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current										
<b>Budget</b>	<b>Direct Budget:</b> 4,701,300.00	<b>Indirect Budget:</b> 2,615,631.00	<b>Total Budget:</b> 7,316,931.00										
<b>Principal Investigator/Client</b>	Richard Miech (Survey Research Center)												
<b>Funding Agency</b>													
<b>IRB</b>	<b>HUM#:</b> 00131235	<b>Period Of Approval:</b>	4/18/2019 - 4/17/20										
<b>Project Team</b>	<b>Project Lead:</b> Rebecca Gatward <b>Budget Analyst:</b> Mary Johnson <b>Production Manager:</b> Margaret Lavanger <b>Senior Project Advisor:</b> Gregg Peterson <b>Production Manager:</b> <b>Production Manager:</b>												
<b>Proposal #:</b>	no data												
<b>Description:</b>	<p>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.</p> <p>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.</p>												
<b>SRO Project Period</b>	04/2017 - 04/2022												
<b>Data Col Period</b>	02/2018 - 07/2022												
<b>Security Plan</b>	Yes												
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"><b>PreProduction Start:</b> 04/30/2017</td> <td style="padding: 5px;"><b>Pretest Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>Pretest End:</b></td> <td style="padding: 5px;"><b>Recruitment Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>Staffing Completed:</b></td> <td style="padding: 5px;"><b>GIT Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>SS Train Start:</b></td> <td style="padding: 5px;"><b>SS Train End:</b></td> </tr> <tr> <td style="padding: 5px;"><b>DC Start:</b></td> <td style="padding: 5px;"><b>DC End:</b> 07/30/2022</td> </tr> </table>			<b>PreProduction Start:</b> 04/30/2017	<b>Pretest Start:</b>	<b>Pretest End:</b>	<b>Recruitment Start:</b>	<b>Staffing Completed:</b>	<b>GIT Start:</b>	<b>SS Train Start:</b>	<b>SS Train End:</b>	<b>DC Start:</b>	<b>DC End:</b> 07/30/2022
<b>PreProduction Start:</b> 04/30/2017	<b>Pretest Start:</b>												
<b>Pretest End:</b>	<b>Recruitment Start:</b>												
<b>Staffing Completed:</b>	<b>GIT Start:</b>												
<b>SS Train Start:</b>	<b>SS Train End:</b>												
<b>DC Start:</b>	<b>DC End:</b> 07/30/2022												
<b>Other Project Team Members:</b>	DRAFT - Hueichun Peng, Minako, David B, Debra Heier												
<b>Other Project Names:</b>													
<b>Sample Mgmt Sys</b>	SurveyTrak; Project specific system (SurveyCTO)												
<b>Data Col Tool</b>	Other (SurveyCTO)												
<b>Hardware</b>	Tablet												
<b>DE Software</b>	N/A												
<b>QC Recording Tool</b>	N/A												
<b>Incentive</b>	Yes, Other (Honorarium paid to school by MT project staff )												
<b>Administration</b>	ISR Group (MTF project team)												
<b>Payment Type</b>	NA												
<b>Payment Method</b>	Check through other system												

<b>Report Period</b>	Mar, 2021 (MTF base year 2017-2022)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	On Track		
<b>Monthly Update</b>	March updates - 118 school admins were completed in March within these schools 11,040 students completed the survey. - We are encouraging the IWERs to 'tread lightly' - we know this is a challenging time for schools and we do not want		

to increase the burden on teachers, Principals and other staff. For example, we have implemented a protocol which limits follow-up with Contact Person in situations where the IWER finds it difficult to obtain enrollment figures after the admin.

### Special Issues

#### Cost

Apr 13, 2021

<b>Total Cost to Date (Direct + Indirect):</b>	5,406,424.58
<b>Estimated Cost at Completion (E\$AC):</b>	6,923,939.21
<b>Total Budget:</b>	7,316,931.00
<b>Variance (Budget minus E\$AC):</b>	392,991.79
<b>Reason For Variance:</b>	<ul style="list-style-type: none"> <li>- Wave 1 (2017-18) &amp; Wave 2 (2018-19) - 50 supplemental school admins (not budgeted)</li> <li>- Wave 2 travel costs were higher than budgeted due to staff availability.</li> <li>- Wave 3 (2019-2020) - 500 additional tablets were purchased. The cost of these and other necessary equipment was not budgeted.</li> <li>- 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.</li> <li>- Wave 5 - Due to change in data collection design (new web mode) IWER hours and other costs associated with in person school admins 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.</li> </ul>

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

Apr 13, 2021

<b>Dollars Projected For Month:</b>	192,583.34
<b>Actual Dollars Used:</b>	119,214.54
<b>Variance (Projected minus Actual):</b>	73,368.80
<b>Reason For Variance:</b>	The variance is due to lower IWER hours used than projected. The HPA (hours per admin) decreased during March - April IWER hours have been adjusted using this lower HPA.

#### Measures

	Units Complete	RR	HPI
<b>Current Goal:</b>			
<b>Goal at Completion:</b>			
<b>Current actual:</b>			
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

#### Other Measures

<b>Project Name</b>	Monitoring the Future Panel (web) 2021 (MTF Panel (main data collection) 2021)				
<b>Project Mode</b>	Primary: Web      Total of Modes: 1				
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current		
<b>Budget</b>	<b>Direct Budget:</b> 729,094.00	<b>Indirect Budget:</b> 405,907.00	<b>Total Budget:</b> 1,135,001.00		
<b>Principal Investigator/Client</b>	John Schulenberg (UM-SRC)				
<b>Funding Agency</b>					
<b>IRB</b>	<b>HUM#:</b> HUM-0013R02	<b>Period Of Approval:</b>	In continuing Review		
<b>Project Team</b>	<b>Project Lead:</b> Donnalee Ann Grey-Farquharson <b>Budget Analyst:</b> Mary Johnson <b>Production Manager:</b> <b>Senior Project Advisor:</b> Gregg Peterson <b>Production Manager:</b> Rebecca Gatward <b>Production Manager:</b>				
<b>Proposal #:</b>	no data				
<b>Description:</b>	<p>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.</p> <p>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.</p> <p>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%.</p>				
<b>SRO Project Period</b>	01/2021 - 12/2021				
<b>Data Col Period</b>	04/2021 - 10/2021				
<b>Security Plan</b>	NA				
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> <b>PreProduction Start:</b>  <b>Pretest End:</b>  <b>Staffing Completed:</b>  <b>SS Train Start:</b>  <b>DC Start:</b> </td> <td style="padding: 5px;"> <b>Pretest Start:</b>  <b>Recruitment Start:</b>  <b>GIT Start:</b>  <b>SS Train End:</b>  <b>DC End:</b> </td> </tr> </table>			<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b>	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>
<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b>	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>				
<b>Other Project Team Members:</b>	Gregg Peterson (SPA), Rebecca Gatward (Director), Donnalee Grey-Farquharson, Hueichun Peng, Lloyd Hemingway, Shaowei Sun, Minako Edgar, Peter Sparks, Ashwin Dey, Hongyu Johnson				
<b>Other Project Names:</b>	MTF Illume Web 2021				
<b>Sample Mgmt Sys</b>	Web SMS; Project specific system (RLM, RIMS)				
<b>Data Col Tool</b>	Illume				
<b>Hardware</b>	NA				
<b>DE Software</b>	N/A				
<b>QC Recording Tool</b>	N/A				
<b>Incentive</b>	Yes, Other (Managed by SRC PI Staff)				
<b>Administration</b>	N/A				
<b>Payment Type</b>	N/A				
<b>Payment Method</b>	N/A				
<b>Report Period</b>	Mar, 2021 (MTF Panel (main data colle	<b>Project Phase</b>	Implementing		
<b>Risk Level</b>	On Track				



**Monthly Update**

1. PI study staff and SRO staff continued on testing questionnaire Forms (1-60) in stand-alone and integration testing environments.
2. Testing integration on Lab SMS, Web SMS and RLM systems
3. Preparing upcoming April prod-testing prior to launching the data collection.

**Special Issues****Cost****Mar 31, 2021**

<b>Total Cost to Date (Direct + Indirect):</b>	855,490.94
<b>Estimated Cost at Completion (E\$AC):</b>	1,128,306.41
<b>Total Budget:</b>	1,135,001.00
<b>Variance (Budget minus E\$AC):</b>	6,694.59
<b>Reason For Variance:</b>	The amount of underrun will be adjusted in April.

**Projections****Mar 31, 2021**

<b>Dollars Projected For Month:</b>	30,555.89
<b>Actual Dollars Used:</b>	25,552.83
<b>Variance (Projected minus Actual):</b>	5,003.06
<b>Reason For Variance:</b>	Some programming and testing work delayed to April.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b> <b>Goal at Completion:</b> <b>Current actual:</b> <b>Estimate at Complete:</b> <b>Variance:</b>			

**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**

<b>PreProduction Start:</b>	<b>Pretest Start:</b>
<b>Pretest End:</b>	<b>Recruitment Start:</b>
<b>Staffing Completed:</b>	<b>GIT Start:</b>
<b>SS Train Start:</b>	<b>SS Train End:</b>
<b>DC Start:</b>	<b>DC End:</b>

**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** Mar, 2021 (MTF HID) **Project Phase** Implementing

**Risk Level** On Track

**Monthly Update** In March we continued with data collection, recruiting the sample into completing the Annual (baseline) HID survey collection. We closed the annual survey on April 5. We managed a 37.7% response rate Annual survey completion (of those eligible to complete). This is about the same as it has been in the previous two waves of data collection. Completion of daily surveys has been between 73-90%, also similar to previous waves. For April, we will be waiting for R's to complete their remaining Daily surveys. In late-April we will then close the Wave 3 survey completely and

deliver the survey data to the MTF team in SAS format.

#### Special Issues

##### Cost

Apr 15, 2021

<b>Total Cost to Date (Direct + Indirect):</b>	218,268.70	
<b>Estimated Cost at Completion (E\$AC):</b>	333,822.70	
<b>Total Budget:</b>	468,982.00	
<b>Variance (Budget minus E\$AC):</b>	135,159.30	
<b>Reason For Variance:</b>	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

Apr 15, 2021

<b>Dollars Projected For Month:</b>	10,538.66
<b>Actual Dollars Used:</b>	13,232.52
<b>Variance (Projected minus Actual):</b>	-2,693.86
<b>Reason For Variance:</b>	—

##### Measures

	Units Complete	RR	HPI
<b>Current Goal:</b>			
<b>Goal at Completion:</b>			
<b>Current actual:</b>			
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

##### Other Measures

<b>Project Name</b>	Panel Study of Income Dynamics 2021 (PSID21)			
<b>Project Mode</b>	Primary: Telephone	Secondary: Web	Total of Modes: 2	
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current
<b>Budget</b>	<b>Direct Budget:</b>	4,434,021.00	<b>Indirect Budget:</b>	2,483,047.00
			<b>Total Budget:</b>	6,917,068.00
<b>Principal Investigator/Client</b>	David Johnson (UM) Katherine McGonagle (UM) Narayan Sastry (UM)			
<b>Funding Agency</b>	NSF, NIA, NICHD, The Office of the Assistant Secretary for Planning and Evaluation of the United States, DHHS, The Econom			
<b>IRB</b>	<b>HUM#:</b>	HUM00062417	<b>Period Of Approval:</b>	8/20/2020 - 8/19/2021
<b>Project Team</b>	<b>Project Lead:</b>	Shonda R Kruger-Ndiaye		
	<b>Budget Analyst:</b>	Megan Gomez-Mesquita		
	<b>Production Manager:</b>	Stacy Quisenberry		
	<b>Senior Project Advisor:</b>	Stephanie A Chardoul		
	<b>Production Manager:</b>	Sarah Crane		
	<b>Production Manager:</b>	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**

<b>PreProduction Start:</b>	04/01/2020	<b>Pretest Start:</b>	09/28/2020
<b>Pretest End:</b>	10/25/2020	<b>Recruitment Start:</b>	10/15/2020
<b>Staffing Completed:</b>	12/02/2020	<b>GIT Start:</b>	
<b>SS Train Start:</b>	02/24/2021	<b>SS Train End:</b>	03/05/2021
<b>DC Start:</b>	03/18/2021	<b>DC End:</b>	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** Mar, 2021 (PSID21) **Project Phase** Implementing

**Risk Level** Some Concerns

**Monthly Update** Production data collection launched 3/19/21. SRO work in March was heavily focused on identifying and troubleshooting technical issues that posed problems for various aspects of our production launch, including:  
 --Very significant sample load and rules running delays the week of production launch.  
 --Upgrading the server to B 5.8.12 to address Blaise Download Error and Lingering Record Lock.  
 --Upgrading the DCA with mods needed for production.

We also finalized the 68 ID Site and Self Scheduler for production.

March also included preparation for Training 2: April 6 - 9 and 12 -14.

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.

As of the writing of this report (4/20), we have English CATI sample and the soft launch of 50 Web cases in production. The Full Web launch and Spanish sample (CATI and Web) remains to be released.

#### Special Issues

**Cost**  
**Mar 31, 2021**

<b>Total Cost to Date (Direct + Indirect):</b>	1,386,517.16
<b>Estimated Cost at Completion (E\$AC):</b>	7,054,789.46
<b>Total Budget:</b>	6,917,068.00
<b>Variance (Budget minus E\$AC):</b>	-137,721.46
<b>Reason For Variance:</b>	We now project an overrun of approx. 2%. This is the first month where we are reporting the increased CASIC rate, which caused a roughly \$46K increase in direct costs. Most of the additional increase is due to (in order of magnitude) Programmer, Data Manager, and Management hour increases. Interviewer and ST data collection hours came in low but were rolled forward. We're still projecting the same total production hours,
	Not yet included: --Proposed TSG modifications (increases) requested this week or yet to be discussed. --Increases to management effort to reflect proposed changes to Shonda's and Rachel's roles

**Projections**  
**Mar 31, 2021**

<b>Dollars Projected For Month:</b>	425,075.93
<b>Actual Dollars Used:</b>	374,610.87
<b>Variance (Projected minus Actual):</b>	50,465.06
<b>Reason For Variance:</b>	lwer and ST data collection hours came in lower than projected due to the delay in our production timeline. 1,216.63 fewer hours were worked in March than projected.

Measures		Units Complete	RR	HPI
<b>Current Goal:</b>				
<b>Goal at Completion:</b>	9694		89%	7.5
<b>Current actual:</b>	1146		19.79%	5.27
<b>Estimate at Complete:</b>	9694		89%	7.5
<b>Variance:</b>	0		0	0

**Other Measures** HPI is through 4/17. All other Prod data are through the evening of 4/20. lw, RR, and HPI goals by week are not yet available.

<b>Project Name</b>	PSID Child Development Supplement V (2019) (CDS-19)												
<b>Project Mode</b>	Primary: Face to Face	Secondary: Telephone	Total of Modes: 2										
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current										
<b>Budget</b>	<b>Direct Budget:</b> 5,801,561.00	<b>Indirect Budget:</b> 3,164,398.00	<b>Total Budget:</b> 8,965,959.00										
<b>Principal Investigator/Client</b>	Narayan Sastry (SRC) Paula Fomby (SRC)												
<b>Funding Agency</b>	NICHD, Robert Wood Johnson Foundation												
<b>IRB</b>	<b>HUM#:</b> HUM00166316	<b>Period Of Approval:</b>	6/11/18 - 8/4/2021										
<b>Project Team</b>	<b>Project Lead:</b> Rachel Anne Orłowski <b>Budget Analyst:</b> Megan Gomez-Mesquita <b>Production Manager:</b> Dianne G Casey <b>Senior Project Advisor:</b> Stephanie A Chardoul <b>Production Manager:</b> <b>Production Manager:</b>												
<b>Proposal #:</b>	no data												
<b>Description:</b>	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.												
<b>SRO Project Period</b>	09/2018 - 02/2021												
<b>Data Col Period</b>	09/2019 - 12/2020												
<b>Security Plan</b>	NA												
<b>Milestone Dates</b>	<table border="1"> <tr> <td><b>PreProduction Start:</b> 01/07/2019</td> <td><b>Pretest Start:</b> 07/15/2019</td> </tr> <tr> <td><b>Pretest End:</b> 08/04/2019</td> <td><b>Recruitment Start:</b> 05/02/2019</td> </tr> <tr> <td><b>Staffing Completed:</b> 08/05/2019</td> <td><b>GIT Start:</b> 09/16/2019</td> </tr> <tr> <td><b>SS Train Start:</b> 09/18/2019</td> <td><b>SS Train End:</b> 09/23/2019</td> </tr> <tr> <td><b>DC Start:</b> 10/01/2019</td> <td><b>DC End:</b> 12/31/2020</td> </tr> </table>			<b>PreProduction Start:</b> 01/07/2019	<b>Pretest Start:</b> 07/15/2019	<b>Pretest End:</b> 08/04/2019	<b>Recruitment Start:</b> 05/02/2019	<b>Staffing Completed:</b> 08/05/2019	<b>GIT Start:</b> 09/16/2019	<b>SS Train Start:</b> 09/18/2019	<b>SS Train End:</b> 09/23/2019	<b>DC Start:</b> 10/01/2019	<b>DC End:</b> 12/31/2020
<b>PreProduction Start:</b> 01/07/2019	<b>Pretest Start:</b> 07/15/2019												
<b>Pretest End:</b> 08/04/2019	<b>Recruitment Start:</b> 05/02/2019												
<b>Staffing Completed:</b> 08/05/2019	<b>GIT Start:</b> 09/16/2019												
<b>SS Train Start:</b> 09/18/2019	<b>SS Train End:</b> 09/23/2019												
<b>DC Start:</b> 10/01/2019	<b>DC End:</b> 12/31/2020												
<b>Other Project Team Members:</b>													
<b>Other Project Names:</b>													
<b>Sample Mgmt Sys</b>	SurveyTrak; Other (Weblog)												
<b>Data Col Tool</b>	Blaise 4.8												
<b>Hardware</b>	Laptop; [UM cell] Phone												
<b>DE Software</b>	Other												
<b>QC Recording Tool</b>	Camtasia												
<b>Incentive</b>	Yes, R												
<b>Administration</b>	ISR Group (PSID)												
<b>Payment Type</b>	Check, post; Cash, post												
<b>Payment Method</b>	Check through other system (PSID-RAPS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (PS)												

<b>Report Period</b>	Mar, 2021 (CDS-19)	<b>Project Phase</b>	Closing
<b>Risk Level</b>	On Track		
<b>Monthly Update</b>	<p>Time Diary Coding and Entry work continued -- aiming to end in April. Currently performing additional time diary coding QC -- have identified three coders with high error rates.</p> <p>Delivered saliva samples to the BSL. Will monitor number of samples logged in April. SRO will continue to store saliva in the SRO fridge with monthly delivery to BSL.</p> <p>Project managers, data manager, and DMSS preparing final Child and Other Adult datasets and data documentation.</p>		

Last regularly scheduled PI/Project team meeting and Project Management team meetings both took place on 3/29.

### Special Issues

<b>Cost</b> <b>Mar 31, 2021</b>	<b>Total Cost to Date (Direct + Indirect):</b>	8,947,326.97
	<b>Estimated Cost at Completion (E\$AC):</b>	8,984,200.34
	<b>Total Budget:</b>	8,965,959.00
	<b>Variance (Budget minus E\$AC):</b>	-18,241.34
	<b>Reason For Variance:</b>	Increased admin assistant effort to inventory and package interviewer supplies for transfer to Thompson for storage. Increased survey tech effort for additional time diary QC.

<b>Projections</b> <b>Mar 31, 2021</b>	<b>Dollars Projected For Month:</b>	30,045.03
	<b>Actual Dollars Used:</b>	27,884.30
	<b>Variance (Projected minus Actual):</b>	2,160.73
	<b>Reason For Variance:</b>	Slight over-projections across multiple staff.

### Measures

	Units Complete	RR	HPI
<b>Current Goal:</b>			
<b>Goal at Completion:</b>			
<b>Current actual:</b>			
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

### Other Measures

<b>Project Name</b>	Qatar World Mental Health Survey (WMH-Qatar)			
<b>Project Mode</b>	Primary: Telephone	Total of Modes: 1		
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current	
<b>Budget</b>	<b>Direct Budget:</b>	62,440.00	<b>Indirect Budget:</b>	12,488.00
			<b>Total Budget:</b>	74,928.00
<b>Principal Investigator/Client</b>	Zeina Mneimneh (University of Michigan) Salma Mawfek Khaled (Qatar University)			

<b>Funding Agency</b>	Cambridgeshire and Peterborough NHS Foundation Trust			
<b>IRB</b>	<b>HUM#:</b>	<b>Period Of Approval:</b>		
<b>Project Team</b>	<b>Project Lead:</b>	Sarah Elisa Broumand		
	<b>Budget Analyst:</b>	Carl S Remmert		
	<b>Production Manager:</b>			
	<b>Senior Project Advisor:</b>	Gina-Qian Yang Cheung		
	<b>Production Manager:</b>			
	<b>Production Manager:</b>			

**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**

<b>PreProduction Start:</b>	<b>Pretest Start:</b>
<b>Pretest End:</b>	<b>Recruitment Start:</b>
<b>Staffing Completed:</b>	<b>GIT Start:</b>
<b>SS Train Start:</b>	<b>SS Train End:</b>
<b>DC Start:</b>	<b>DC End:</b>

**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** Mar, 2021 (WMH-Qatar) **Project Phase** Implementing

**Risk Level** On Track

**Monthly Update** The SRO/SRC team met with the SESRI team several times to review the dashboard and monitoring team's processes. SERSI made modifications to their dashboard and their process based on our recommendations to help them ingest their QC data.  
The teams continues to hold bi-monthly meetings, as all deliverables have been met for the project.

**Special Issues** None



**Cost**  
**Mar 31, 2021**

**Total Cost to Date (Direct + Indirect):** 61,242.27  
**Estimated Cost at Completion (E\$AC):** 65,320.19  
**Total Budget:** 74,928.00  
**Variance (Budget minus E\$AC):** 9,607.81  
**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**  
**Mar 31, 2021**

**Dollars Projected For Month:** 711.48  
**Actual Dollars Used:** 678.43  
**Variance (Projected minus Actual):** 33.05  
**Reason For Variance:** meetings were canceled by customer as they are working through their system and production.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b> <b>Goal at Completion:</b> <b>Current actual:</b> <b>Estimate at Complete:</b> <b>Variance:</b>			

**Other Measures**

<b>Project Name</b>	Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study (STARRS-LS Waves 3 & 4)																							
<b>Project Mode</b>	Primary: Web	Secondary: Telephone	Total of Modes: 2																					
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current																				
<b>Budget</b>	<b>Direct Budget:</b>	8,196,521.00	<b>Indirect Budget:</b>	4,590,892.00																				
			<b>Total Budget:</b>	12,787,413.00																				
<b>Principal Investigator/Client</b>	James Wagner (University of Michigan) Robert Ursano (Uniformed Services University of the Health Scienc) Murray Stein (University of California San Diego)																							
<b>Funding Agency</b>	Department of Defense																							
<b>IRB</b>	<b>HUM#:</b>	HUM00180765	<b>Period Of Approval:</b>	6/3/2020 - 6/2/2021																				
<b>Project Team</b>	<b>Project Lead:</b>	Meredith A House																						
	<b>Budget Analyst:</b>	William Lokers																						
	<b>Production Manager:</b>	Ruth B Philippou																						
	<b>Senior Project Advisor:</b>	Lisa S Holland																						
	<b>Production Manager:</b>	Juan Carlos Donoso																						
	<b>Production Manager:</b>	Lisa M Lewandowski-Romps																						
<b>Proposal #:</b>	no data																							
<b>Description:</b>	<p>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.</p> <p>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.</p> <p>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.</p> <p>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).</p>																							
<b>SRO Project Period</b>	05/2020 - 04/2025																							
<b>Data Col Period</b>	11/2020 - 10/2024																							
<b>Security Plan</b>	Yes																							
<b>Milestone Dates</b>	<table border="1" style="width: 100%;"> <tr> <td><b>PreProduction Start:</b></td> <td>04/01/2020</td> <td><b>Pretest Start:</b></td> <td></td> </tr> <tr> <td><b>Pretest End:</b></td> <td></td> <td><b>Recruitment Start:</b></td> <td>07/23/2020</td> </tr> <tr> <td><b>Staffing Completed:</b></td> <td>10/01/2020</td> <td><b>GIT Start:</b></td> <td></td> </tr> <tr> <td><b>SS Train Start:</b></td> <td>11/18/2020</td> <td><b>SS Train End:</b></td> <td>11/24/2020</td> </tr> <tr> <td><b>DC Start:</b></td> <td>11/09/2020</td> <td><b>DC End:</b></td> <td>11/03/2022</td> </tr> </table>				<b>PreProduction Start:</b>	04/01/2020	<b>Pretest Start:</b>		<b>Pretest End:</b>		<b>Recruitment Start:</b>	07/23/2020	<b>Staffing Completed:</b>	10/01/2020	<b>GIT Start:</b>		<b>SS Train Start:</b>	11/18/2020	<b>SS Train End:</b>	11/24/2020	<b>DC Start:</b>	11/09/2020	<b>DC End:</b>	11/03/2022
<b>PreProduction Start:</b>	04/01/2020	<b>Pretest Start:</b>																						
<b>Pretest End:</b>		<b>Recruitment Start:</b>	07/23/2020																					
<b>Staffing Completed:</b>	10/01/2020	<b>GIT Start:</b>																						
<b>SS Train Start:</b>	11/18/2020	<b>SS Train End:</b>	11/24/2020																					
<b>DC Start:</b>	11/09/2020	<b>DC End:</b>	11/03/2022																					
<b>Other Project Team Members:</b>	Heather Schroeder, Paul Burton, Ryan Yoder, Leah Roberts, Keith Liebetreu, 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																							

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

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<b>Report Period</b>	Mar, 2021 (STARRS-LS Waves 3 & 4)	<b>Project Phase</b>	Implementing
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<b>Risk Level</b>	<i>On Track</i>
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<b>Monthly Update</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> We have released three replicates (2,847 sample lines) and completed 2,049 interviews as of April 1.</li> <li><input type="checkbox"/> The batch of survey changes involving clarifications in the personal relationships and social networks section were released to production.</li> <li><input type="checkbox"/> We continued bi-weekly meetings with the ODUSA to coordinate Safety Plan and respondent locating activities.</li> <li><input type="checkbox"/> We coordinated with USUHS and HJF to obtain a Letter of Intent to fund so that we can set up a hardship account starting May 1 in case the actual Year 2 funding is not yet available.</li> <li><input type="checkbox"/> We responded to USUHS's requests for additional detail on Year 2 budget line items.</li> <li><input type="checkbox"/> We continued work on an analysis of the areas in our budget where we are spending more than anticipated. When completed, we will share the information with the PIs.</li> <li><input type="checkbox"/> U-M provided the quarterly Safety Plan comparison tables ahead of the March GSC meeting.</li> <li><input type="checkbox"/> James and Meredith attended the quarterly GSC meeting on March 16.</li> <li><input type="checkbox"/> We created a "STARRS Closeout Activities and Considerations" list which is now available if the research team receives additional questions about scope/timeline for STARRS Enclave closeout.</li> <li><input type="checkbox"/> James and Meredith participated in discussions and emails regarding the ODUSA memo that requested the date by which the research team will need to know whether Wave 4 will be conducted.</li> <li><input type="checkbox"/> IRB: <ul style="list-style-type: none"> <li><input type="checkbox"/> The Wave 1 ORIO was acknowledged by the U-M and USUHS IRBs.</li> <li><input type="checkbox"/> The amendment (#5) for additional survey changes (clarifications in the personal relationships, social networks sections) was approved by USUHS.</li> <li><input type="checkbox"/> An amendment (#6) for appointment reminder texts, and minor questionnaire wording changes (based on interviewer feedback) was submitted to the U-M IRB.</li> </ul> </li> <li><input type="checkbox"/> We carried out extensive troubleshooting on the Windows RStudio PDF compile feature and installed multiple new R packages in the Linux and Windows environments.</li> <li><input type="checkbox"/> We continued to work on the geocoded link file request.</li> <li><input type="checkbox"/> We worked on creating the sample file for the annual NDI request from the CDC.</li> <li><input type="checkbox"/> We continued work on biomarker group requests for assistance. The Texas A&amp;M request was completed.</li> <li><input type="checkbox"/> 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).</li> </ul>
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**Special Issues**

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

□ Year 2 funding: We are working with USUHS and HJF to put measures in place that will allow us to continue working after the Year 1 funds expire at the end of April. These measures include a no cost extension and obtaining a Letter of Intent to fund so that we can start the process of establishing hardship accounts. We are also spending time meeting with SRO and SRC leadership and we are completing the necessary administrative work to keep things going. These measures should allow us to continue working for a few months, but the University may place limits on how far we can go without an award.

□ We have updated our costs based on our Wave 3 experience so far. To date, our projected costs for Waves 3 and 4 are higher than anticipated (see Table 4). Some areas for the increased cost estimates are a longer survey instrument time for CATI, and increased hours for programming instrument changes. We are monitoring the situation closely and have continued work on an analysis of the areas in our budget where we are projecting a deficit. When completed, we will share the information with the PIs.

□ 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 HIPAA authorization cannot be provided verbally during CATI interviews. We have established detailed procedures for telephone interviews and, so far, have the results from two completed replicates. 61% of Replicates 1-2 CATI respondents completed the consent supplement survey. About 38% of these CATI consent supplement completions required at least some reminder calling. The consent rates themselves were 94% for MHS HIPAA and 89% for VHA HIPAA. These early results look positive, but we will continue to monitor the success of gaining the HIPAA consents for CATI respondents.

□ 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**  
**Feb 28, 2021**

**Total Cost to Date (Direct + Indirect):** 1,644,334.22

**Estimated Cost at Completion (E\$AC):** 13,211,909.50

**Total Budget:** 12,787,413.00

**Variance (Budget minus E\$AC):** -402,519.50

**Reason For Variance:**

After entering the March projections updates, the overall overrun increased from \$366,169 to \$402,520. Although February costs came in very close to projections, there were some respondent payments and Enclave non-salary costs that did not hit in February that needed to be moved forward.

**Projections**  
**Feb 28, 2021**

**Dollars Projected For Month:** 239,602.21

**Actual Dollars Used:** 241,759.81

**Variance (Projected minus Actual):** -2,157.60

**Reason For Variance:**

Production costs were higher than projected, but some respondent payments and Enclave non-sal costs did not hit as expected, so these balanced each other out

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b> <b>Goal at Completion:</b> <b>Current actual:</b> <b>Estimate at Complete:</b> <b>Variance:</b>			

**Other Measures**

**Project Name** Surveys of Consumer Attitudes (SCA 2021)

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

**Project Type** Sponsored Projects **Project Status** Current

**Budget** **Direct Budget:** 1,122,582.00 **Indirect Budget:** 0.00 **Total Budget:** 1,122,582.00

**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 Cam  
**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** 12/2020 - 12/2021

**Data Col Period** 01/2021 - 12/2021

**Security Plan** NA

**Milestone Dates**

<b>PreProduction Start:</b>	<b>Pretest Start:</b>
<b>Pretest End:</b>	<b>Recruitment Start:</b>
<b>Staffing Completed:</b>	<b>GIT Start:</b>
<b>SS Train Start:</b>	<b>SS Train End:</b>
<b>DC Start:</b> 01/02/2021	<b>DC End:</b> 12/20/2021

**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** Mar, 2021 (SCA 2021) **Project Phase** Implementing

**Risk Level** On Track

**Monthly Update** SCA MAR 2021 began as scheduled on 2/24/2021, and ended as scheduled on 3/22/2021. We completed 604 IWs (323/181/100), four IWs above our goal of 600 (320/180/100); at an overall hpi of 2.98 (.02 below our budgeted hpi of 3.0).

**Special Issues**

**Cost**  
**Apr 15, 2021**

<b>Total Cost to Date (Direct + Indirect):</b>	252,412.16
<b>Estimated Cost at Completion (E\$AC):</b>	1,128,598.80
<b>Total Budget:</b>	1,122,582.00
<b>Variance (Budget minus E\$AC):</b>	-6,016.80
<b>Reason For Variance:</b>	reduced hpi

**Projections**  
**Apr 15, 2021**

<b>Dollars Projected For Month:</b>	88,163.67
<b>Actual Dollars Used:</b>	86,564.52
<b>Variance (Projected minus Actual):</b>	1,599.15
<b>Reason For Variance:</b>	reduced hpi

Measures		Units Complete	RR	HPI
<b>Current Goal:</b>	600			3.0
<b>Goal at Completion:</b>	600			3.0
<b>Current actual:</b>	604			2.98
<b>Estimate at Complete:</b>	604			2.98
<b>Variance:</b>	4			-.02

**Other Measures**

<b>Project Name</b>	Video Communication Technologies in Survey Data Collection (VCT)					
<b>Project Mode</b>	Primary: Mixed    Total of Modes: 3					
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current		
<b>Budget</b>	<b>Direct Budget:</b>	241,958.00	<b>Indirect Budget:</b>	135,497.00 <b>Total Budget:</b> 377,455.00		
<b>Principal Investigator/Client</b>	Dr. Frederick G. Conrad (University of Michigan) Dr. Michael F. Schober (The New School)					
<b>Funding Agency</b>	National Science Foundation					
<b>IRB</b>	<b>HUM#:</b>	HUM00159711	<b>Period Of Approval:</b>	Exempt		
<b>Project Team</b>	<b>Project Lead:</b>	Andrew L Hupp				
	<b>Budget Analyst:</b>	Dean E Stevens				
	<b>Production Manager:</b>	Pooja Varma-Laughlin				
	<b>Senior Project Advisor:</b>	Nicole G Kirgis				
	<b>Production Manager:</b>					
	<b>Production Manager:</b>					
<b>Proposal #:</b>	no data					
<b>Description:</b>	<p>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.</p> <p>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.</p>					
<b>SRO Project Period</b>	09/2018 - 06/2020					
<b>Data Col Period</b>	08/2019 - 11/2019					
<b>Security Plan</b>	NA					
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> <b>PreProduction Start:</b>  <b>Pretest End:</b>  <b>Staffing Completed:</b>  <b>SS Train Start:</b>  <b>DC Start:</b> 10/29/2019 </td> <td style="width: 50%; vertical-align: top;"> <b>Pretest Start:</b>  <b>Recruitment Start:</b>  <b>GIT Start:</b>  <b>SS Train End:</b>  <b>DC End:</b> 04/01/2020 </td> </tr> </table>				<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b> 10/29/2019	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b> 04/01/2020
<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b> 10/29/2019	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b> 04/01/2020					

<b>Other Project Team Members:</b>	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 Video Communication Technologies
<b>Other Project Names:</b>	
<b>Sample Mgmt Sys</b>	MSMS
<b>Data Col Tool</b>	Blaise 5
<b>Hardware</b>	Desktop; Other (Webcam, USB headset)
<b>DE Software</b>	N/A
<b>QC Recording Tool</b>	N/A
<b>Incentive</b>	Yes, R
<b>Administration</b>	SRO Group; Other (CloudResearch (TurkPrime))
<b>Payment Type</b>	Cash, prepaid (\$2); Other (ABS=\$2 giftcode -> prepaid; \$20/\$22 giftcode -> post)
<b>Payment Method</b>	Imprest Cash Fund from ISR Business Office; Other (TurkPrime (now CloudResearch))

<b>Report Period</b>	Mar, 2021 (VCT)	<b>Project Phase</b>	Closing
<b>Risk Level</b>	<i>On Track</i>		
<b>Monthly Update</b>	<p>The team continues to meet regularly to discuss analyses that Tian and Kallan are doing.</p> <p>Revisions to the first study findings paper are almost complete. The revisions will be shared with the other co-authors for review.</p> <p>The interviewer effects paper submitted to JSSAM has been reviewed. The team is working on revisions based on reviewer comments. One of the comments was related to data being publicly available. The analyses in this paper included interviewer characteristics. We believe we are okay to share this file but are checking with SRO Admin. The current plan is to make all of the study data available via openICPSR. This group has experience with this on a previous study.</p> <p>Andrew and Kallan are working on a paper on respondent burden that will use some data from the video project.</p> <p>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).</p> <p>Our 2021 AAPOR submissions were accepted.</p> <p>--A panel on video at AAPOR (Andrew H. coordinated and submitted, the panel will consist of...</p> <p>--A paper on willingness to participate in video interviews (submitted by the New School). Kallan and Andrew H. are co-authors.</p> <p>--A paper from the European Social Survey (ESS) about their experience augmenting with video in the current wave of ESS.</p> <p>--A paper from the American National Election Studies (ANES) about their experience with web and video in their pre- and post-election surveys.</p> <p>--A paper on recruitment and participation that Kallan will present (Andrew H. is a co-author).</p> <p>--In addition to the panel, Kallan and Andrew are...</p> <p>--Co-authors of a paper on interviewer effects in video interviews that Brady is the lead on (Ai Rene a PhD student will present). This paper was added to the panel session by AAPOR.</p> <p>--Lead authors of a paper on a model for respondent burden that uses data from SCIP, the iPhone study, and the video study</p> <p>The papers we were invited to submit for ESRA have been accepted (in two different panels) on video interviewing for social surveys, and another session on new communication channels in web-based surveys. Andrew and Kallan are co/authors on all of the submissions.</p> <p>--A paper on recruitment and participation (panel session).</p> <p>--A paper on data quality in live video interviews (panel session).</p> <p>--A paper on willingness and discomfort answering sensitive questions in live video survey interviews (panel session).</p> <p>--A paper on precoded video interviews (closed session)</p> <p>Laura will need to do a final MSMS data set in the future. Andrew and Kallan need to finish finalizing the remaining lines. That won't happen until sometime in May after PSID has settled down.</p>		



**Special Issues****Cost**

**Total Cost to Date (Direct + Indirect):** 359,859.68  
**Estimated Cost at Completion (E\$AC):** 376,275.62  
**Total Budget:** 377,455.00  
**Variance (Budget minus E\$AC):** 726.38

**Reason For Variance:**

VM costs are on target. The total costs to date are lower than last month.  
The current cost projections for the MiCDA Analysis account are below.

The cost information for the MiCDA analysis funds are:

Total Budget: \$30,089.00  
 Total Cost to Date: \$8,283.17  
 Estimated cost at completion: \$30,065.63  
 Variance: \$23.37

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**

**Dollars Projected For Month:** 0.00  
**Actual Dollars Used:** 165.06  
**Variance (Projected minus Actual):** -165.06

**Reason For Variance:**

One member charged this account a few hours rather than the supplemental account.

**Measures**

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

**Other Measures**

# ***Survey Research Operations***

## ***Monthly Project Report***

***Development Initiative and No Data Collection Projects***

***March 2021***



## Developmental Initiatives

*(Day in the Life Videos ) TSME21-Day in the Life Videos (425201)*  
*(TSME21- Illume Upgrade (424466)) TSME21- Illume Upgrade (424466)*  
*(TSME21-Blaise 5 Testing (423562)) TSME21-Blaise 5 Testing (423562)*  
*(TSME21-ColdFusion Server Upgrade (425197)) TSME21-ColdFusion Server Upgrade (425197)*  
*(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*  
*(TSME21-SelfSchedUI (483424)) Self-Scheduling Interface for MSMS*  
*(TSME21-ST international (483227)) TSME21 - ST international*

**NonArchived Development Initiative and No-DataCol Projects**

Project	Type	Status	Project Lead	Jan	Feb	Mar
<i>Day in the Life Videos</i>	Initiatives	Current	Vivienne Y Outlaw	🟡	🟡	🟡
<i>TSME R-PAY SYSTEM RE-WRITE(483257)</i>	Initiatives	Current	Jeffrey L Smith	🟦	🟢	🟦
<i>TSME SRO SYS MAINTENANCE-GENERAL (483910)</i>	Initiatives	Current	Jeffrey L Smith	🟢	🟢	🟦
<i>TSME21- Illume Upgrade (424466)</i>	Initiatives	Current	Hueichun Peng	🟢	🟢	🟢
<i>TSME21-Blaise 5 Testing (423562)</i>	Initiatives	Current	Gina-Qian Yang Cheung	🟢	🟢	🟢
<i>TSME21-ColdFusion Server Upgrade (425197)</i>	Initiatives	Current	Hueichun Peng	🟢	🟢	🟢
<i>TSME21-DCO Tech System Support</i>	Initiatives	Current	Vivienne Y Outlaw	🟢	🟢	🟢
<i>TSME21-QC-Systems (483249)</i>	Initiatives	Current	Sarah Elisa Broumand	🟢	🟢	🟢
<i>TSME21-RCLS (425196)</i>	Initiatives	Current	Jim Rodgers	🟢	🟢	🟢
<i>TSME21-Replayer (425267)</i>	Initiatives	Current	Jennifer C Arrieta	🟢	🟢	🟢
<i>TSME21-SelfSchedUI (483424)</i>	Initiatives	Current	Andrew L Hupp	🟡	🟡	🟢
<i>TSME21-ST international (483227)</i>	Initiatives	Current	Gina-Qian Yang Cheung	🟢	🟢	🟢

**NonArchived Development Initiative and No-DataCol Projects**

Project	Type	Status	Project Lead	Jan	Feb	Mar
<i>Day in the Life Videos</i>	Initiatives	Current	Vivienne Y Outlaw	🟡	🟡	🟡
<i>TSME R-PAY SYSTEM RE-WRITE(483257)</i>	Initiatives	Current	Jeffrey L Smith	🟦	🟢	🟦
<i>TSME SRO SYS MAINTENANCE-GENERAL (483910)</i>	Initiatives	Current	Jeffrey L Smith	🟢	🟢	🟦
<i>TSME21- Illume Upgrade (424466)</i>	Initiatives	Current	Hueichun Peng	🟢	🟢	🟢
<i>TSME21-Blaise 5 Testing (423562)</i>	Initiatives	Current	Gina-Qian Yang Cheung	🟢	🟢	🟢
<i>TSME21-ColdFusion Server Upgrade (425197)</i>	Initiatives	Current	Hueichun Peng	🟢	🟢	🟢
<i>TSME21-DCO Tech System Support</i>	Initiatives	Current	Vivienne Y Outlaw	🟢	🟢	🟢
<i>TSME21-QC-Systems (483249)</i>	Initiatives	Current	Sarah Elisa Broumand	🟢	🟢	🟢
<i>TSME21-RCLS (425196)</i>	Initiatives	Current	Jim Rodgers	🟢	🟢	🟢
<i>TSME21-Replayer (425267)</i>	Initiatives	Current	Jennifer C Arrieta	🟢	🟢	🟢
<i>TSME21-SelfSchedUI (483424)</i>	Initiatives	Current	Andrew L Hupp	🟡	🟡	🟢
<i>TSME21-ST international (483227)</i>	Initiatives	Current	Gina-Qian Yang Cheung	🟢	🟢	🟢

**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**

James Rodgers - Tech Lead

**Team Members:**

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

Peter Sparks - Developer (R facing page)

Dave Padot - Development consultation

Stakeholder team

Kallan Larsen - Alternative scheduling representative

Heather Schroeder - Stat Unit/Reporting representative

Pooja Varma-Laughlin - SSL representative

Gary Hein - HRS representative

Maryam Buagelia - PSID representative

Stacy Quisenberry - DCO/HRS/PSID representative

**Other Project**

**Names:**

**Sample Mgmt Sys**

NA

**Data Col Tool**

NA

**Hardware**

NA

**DE Software**

NA

**QC Recording Tool**

NA

**Incentive**

NA

**Administration**

NA

**Payment Type**

NA

**Payment Method**

NA

**Report Period** Mar, 2021 (TSME21-SelfSchedUI (4834 **Project Phase** Implementing

**Risk Level** On Track

**Monthly Update** Time in March was devoted to testing and troubleshooting any items that came up. The roll-out was pretty smooth. A few items have come up with the update to Blaise 5.8.12. Since the switch appointment attempts are being written twice. There are two records in the history, but only one appointment in the end. The second appointment written is a rescheduled of the record before it. Peter is looking into this. He is also looking into an issue that's happened a few times in which the sample attributes entered at the scheduling site (name, email, phone, etc.) aren't written to MSMS. This keeps the confirmation/cancellation message from being sent to the respondent. The appointment is still being written and the interviewer is notified.

In April will add Spanish to the self-scheduler ahead of the release of the Spanish sample. We also have on the development list the following two items. Not sure if we will be able to get to those with the remaining funds, although most of the work is on the MSMS side. To-date PSID has seemingly gotten along without them (we are able to have blackout days currently, which we have used).

- 1) Development of inclusion/exclusion parameters (e.g., when/how many appointment slots are available)
- 2) Development on the MSMS side needed for item #2

**Special Issues**

**Cost**

<b>Total Cost to Date (Direct + Indirect):</b>	24,387.49
<b>Estimated Cost at Completion (E\$AC):</b>	29,962.34
<b>Total Budget:</b>	30,000.00
<b>Variance (Budget minus E\$AC):</b>	37.66
<b>Reason For Variance:</b>	Planning to spend funds.

**Projections**

<b>Dollars Projected For Month:</b>	7,619.07
<b>Actual Dollars Used:</b>	6,474.16
<b>Variance (Projected minus Actual):</b>	1,144.91
<b>Reason For Variance:</b>	The two primary charges (Peter S. and Andrew H.) charges a few hours less than projected.

Measures	Units Complete	RR	HPI
<b>Current Goal:</b> <b>Goal at Completion:</b> <b>Current actual:</b> <b>Estimate at Complete:</b> <b>Variance:</b>			

**Other Measures**

<b>Project Name</b>	TSME21 - ST international (TSME21-ST international (483227))				
<b>Project Mode</b>	Primary: Not Available				
<b>Project Type</b>	Developmental Initiatives		<b>Project Status</b>	Current	
<b>Budget</b>	<b>Direct Budget:</b>	40,000.00	<b>Indirect Budget:</b>	0.00	<b>Total Budget:</b> 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** Mar, 2021 (TSME21-ST international (483227)) **Project Phase** Implementing

**Risk Level** On Track

**Monthly Update** minors updates with ST international and FUM

**Special Issues**

<b>Cost</b>	<b>Total Cost to Date (Direct + Indirect):</b>	18,718.00
	<b>Estimated Cost at Completion (E\$AC):</b>	40,000.00
	<b>Total Budget:</b>	40,000.00
	<b>Variance (Budget minus E\$AC):</b>	89.00
	<b>Reason For Variance:</b>	no issues



**Projections**

*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
<i>Current Goal:</i> <i>Goal at Completion:</i> <i>Current actual:</i> <i>Estimate at Complete:</i> <i>Variance:</i>		

**Other Measures**

**Project Name** TSME21- Illume Upgrade (424466) (TSME21- Illume Upgrade (424466))

**Project Mode** Primary: Not Available

**Project Type** Developmental Initiatives **Project Status** Current

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

**Principal Investigator/Client**

**Funding Agency**

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

**Project Team** *Project Lead:* 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**

<i>PreProduction Start:</i>	<i>Pretest Start:</i>
<i>Pretest End:</i>	<i>Recruitment Start:</i>
<i>Staffing Completed:</i>	<i>GIT Start:</i>
<i>SS Train Start:</i>	<i>SS Train End:</i>
<i>DC Start:</i>	<i>DC End:</i>

**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** Mar, 2021 (TSME21- Illume Upgrade (4 **Project Phase** Planning

**Risk Level** On Track

**Monthly Update** We (programmers) spent minimal time on testing the different pieces due to resource constraint and production support. Hueichun has talked to Gregg the possibility that we will continue this work into the next fiscal year (after July 2021).

**Special Issues**

**Cost** *Total Cost to Date (Direct + Indirect):* 1,508.50

**Apr 15, 2021** *Estimated Cost at Completion (E\$AC):* 7,556.60

*Total Budget:* 10,000.00

*Variance (Budget minus E\$AC):* 2,443.40

*Reason For Variance:* na

**Projections**  
**Apr 15, 2021**

*Dollars Projected For Month:* 2,231.02  
*Actual Dollars Used:* 1,327.79  
*Variance (Projected minus Actual):* 903.23  
*Reason For Variance:* na

**Measures**

Units Complete	RR	HPI
<i>Current Goal:</i>		
<i>Goal at Completion:</i>		
<i>Current actual:</i>		
<i>Estimate at Complete:</i>		
<i>Variance:</i>		

**Other Measures**

<b>Project Name</b>	TSME21-Blaise 5 Testing (423562) (TSME21-Blaise 5 Testing (423562))				
<b>Project Mode</b>	Primary: Not Available				
<b>Project Type</b>	Developmental Initiatives		<b>Project Status</b>	Current	
<b>Budget</b>	<b>Direct Budget:</b>	30,000.00	<b>Indirect Budget:</b>	0.00	<b>Total Budget:</b> 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

<b>Report Period</b>	Mar, 2021 (TSME21-Blaise 5 Testing (4	<b>Project Phase</b>	Implementing
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**Risk Level** On Track

**Monthly Update** start to test Blaise 5.9 version features

**Special Issues**

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

Projections

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

Measures

Units Complete	RR	HPI
<i>Current Goal:</i>		
<i>Goal at Completion:</i>		
<i>Current actual:</i>		
<i>Estimate at Complete:</i>		
<i>Variance:</i>		

Other Measures

<b>Project Name</b>	TSME21-ColdFusion Server Upgrade (425197) (TSME21-ColdFusion Server Upgrade (425197))			
<b>Project Mode</b>	Primary: Not Available			
<b>Project Type</b>	Developmental Initiatives	<b>Project Status</b>	Current	
<b>Budget</b>	<b>Direct Budget:</b>	10,000.00	<b>Indirect Budget:</b>	0.00
			<b>Total Budget:</b>	10,000.00

**Principal Investigator/Client**

**Funding Agency**

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

**Project Team**

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

**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**

<b>PreProduction Start:</b>	<b>Pretest Start:</b>
<b>Pretest End:</b>	<b>Recruitment Start:</b>
<b>Staffing Completed:</b>	<b>GIT Start:</b>
<b>SS Train Start:</b>	<b>SS Train End:</b>
<b>DC Start:</b>	<b>DC End:</b>

**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

<b>Report Period</b>	Mar, 2021 (TSME21-ColdFusion Server	<b>Project Phase</b>	Initiation
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**Risk Level** On Track

**Monthly Update**

Team met with Joe about timeline and options.  
Joe created a SROcf2021test with the most recent ColdFusion version.  
Ashwin started to research the ODBC (JDBC) driver to connect to ST.

**Special Issues**

<b>Cost</b>	<b>Total Cost to Date (Direct + Indirect):</b>	737.17
<b>Apr 15, 2021</b>	<b>Estimated Cost at Completion (E\$AC):</b>	5,869.62
	<b>Total Budget:</b>	10,000.00
	<b>Variance (Budget minus E\$AC):</b>	4,130.38
	<b>Reason For Variance:</b>	na

Projections  
Apr 15, 2021

Dollars Projected For Month: 0.00  
Actual Dollars Used: 737.17  
Variance (Projected minus Actual): -737.17  
Reason For Variance: na

Measures

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

Other Measures

<b>Project Name</b>	TSME21-Day in the Life Videos (425201) (Day in the Life Videos )				
<b>Project Mode</b>	Primary: Not Available				
<b>Project Type</b>	Developmental Initiatives		<b>Project Status</b>	Current	
<b>Budget</b>	<b>Direct Budget:</b>	18,000.00	<b>Indirect Budget:</b>	0.00	<b>Total Budget:</b> 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 End:**

**Staffing Completed:**

**SS Train Start:**

**DC Start:**

**Pretest Start:**

**Recruitment Start:**

**GIT Start:**

**SS Train End:**

**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** Mar, 2021 (Day in the Life Videos ) **Project Phase** Implementing

**Risk Level** Some Concerns

**Monthly Update** We are unable to progress as planned due to the restrictions as a result of the pandemic. We are hopeful that this will change in the coming months.

**Special Issues** Due to the pandemic we have not been able to move forward with filming.

**Cost** **Total Cost to Date (Direct + Indirect):** 8,236.43

**Apr 15, 2021** **Estimated Cost at Completion (E\$AC):** 9,948.18

**Total Budget:** 18,000.00

**Variance (Budget minus E\$AC):** 8,051.82

**Reason For Variance:** Due to the pandemic we have not been able to move forward with filming.



Projections  
Apr 15, 2021

Dollars Projected For Month: 0.00  
Actual Dollars Used: 0.00  
Variance (Projected minus Actual): 0.00  
Reason For Variance: Minimal work due to the pandemic.

Measures

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

Other Measures

<b>Project Name</b>	TSME21-DCO Tech System Support (483248) (TSME21-DCO Tech System Support)				
<b>Project Mode</b>	Primary: Not Available				
<b>Project Type</b>	Developmental Initiatives		<b>Project Status</b>	Current	
<b>Budget</b>	<b>Direct Budget:</b>	25,000.00	<b>Indirect Budget:</b>	0.00	<b>Total Budget:</b> 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 End:**

**Staffing Completed:**

**SS Train Start:**

**DC Start:**

**Pretest Start:**

**Recruitment Start:**

**GIT Start:**

**SS Train End:**

**DC End:**

**Other Project**

**Team Members:**

**Other Project**

**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** Mar, 2021 (TSME21-DCO Tech System **Project Phase** Implementing

**Risk Level** On Track

**Monthly Update** ST (Marsha) started to investigate the efforts to import management team data directly from Fred. Fred tech team (Vivienne, Hueichun and Grant) had a lot of communications with Marsha to address the different business rules problems between Fred and ST.  
We also met with ODS team to find out if there is any similar problems with Team Structure in ODS (MSMS projects) reporting and Olive-4.  
Modify different modules/reports as related to SRO\_ID.  
Enhance UM Cell-Phone charge report.  
Support Report Portal Access for DCO staff with Time and Expense Management project.  
Modify emp\_AddressContact view/table (DMSS and Export modules) to include UM cell and phone.  
Modify the Footprint ticket for project assignment to use SRO\_ID, instead of UM\_ID.

**Special Issues**

<b>Cost</b> <b>Apr 15, 2021</b>	<i>Total Cost to Date (Direct + Indirect):</i>	18,823.14
	<i>Estimated Cost at Completion (E\$AC):</i>	32,231.20
	<i>Total Budget:</i>	25,000.00
	<i>Variance (Budget minus E\$AC):</i>	-7,231.20
	<i>Reason For Variance:</i>	na

<b>Projections</b> <b>Apr 15, 2021</b>	<i>Dollars Projected For Month:</i>	3,677.98
	<i>Actual Dollars Used:</i>	4,248.32
	<i>Variance (Projected minus Actual):</i>	-570.34
	<i>Reason For Variance:</i>	na

**Measures**

	Units Complete	RR	HPI
<i>Current Goal:</i> <i>Goal at Completion:</i> <i>Current actual:</i> <i>Estimate at Complete:</i> <i>Variance:</i>			

**Other Measures**

<b>Project Name</b>	TSME21-QC-Systems (483249) (TSME21-QC-Systems (483249))			
<b>Project Mode</b>	Primary: Not Available			
<b>Project Type</b>	Developmental Initiatives		<b>Project Status</b>	Current
<b>Budget</b>	<b>Direct Budget:</b>	30,000.00	<b>Indirect Budget:</b>	0.00
			<b>Total Budget:</b>	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**

<b>PreProduction Start:</b>	<b>Pretest Start:</b>
<b>Pretest End:</b>	<b>Recruitment Start:</b>
<b>Staffing Completed:</b>	<b>GIT Start:</b>
<b>SS Train Start:</b>	<b>SS Train End:</b>
<b>DC Start:</b>	<b>DC End:</b>

**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** Mar, 2021 (TSME21-QC-Systems (483: **Project Phase** Implementing

**Risk Level** On Track

**Monthly Update** Completed work to transition Olive to not using 8 digit IDs and release user maintenance features into Olive. Historic data needed to be scrubbed to remove duplicate user information and correct project management structure data.

**Special Issues** none

**Cost** **Total Cost to Date (Direct + Indirect):** 17,341.54

**Apr 07, 2021** **Estimated Cost at Completion (E\$AC):** 30,444.88

**Total Budget:** 30,000.00

**Variance (Budget minus E\$AC):** -444.88

**Reason For Variance:** Worked on numerous changes to Olive, planning to rebalance hours.

Projections  
Apr 07, 2021

*Dollars Projected For Month:* 4,732.32  
*Actual Dollars Used:* 6,027.10  
*Variance (Projected minus Actual):* -1,294.78  
*Reason For Variance:* Team had to make up work that hadn't been performed.

Measures

Units Complete	RR	HPI
<i>Current Goal:</i>		
<i>Goal at Completion:</i>		
<i>Current actual:</i>		
<i>Estimate at Complete:</i>		
<i>Variance:</i>		

Other Measures

<b>Project Name</b>	TSME21-RCLS (TSME21-RCLS (425196) )				
<b>Project Mode</b>	Primary: Not Available				
<b>Project Type</b>	Developmental Initiatives		<b>Project Status</b>	Current	
<b>Budget</b>	<b>Direct Budget:</b>	15,000.00	<b>Indirect Budget:</b>	0.00	<b>Total Budget:</b> 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**

<b>PreProduction Start:</b>	<b>Pretest Start:</b>
<b>Pretest End:</b>	<b>Recruitment Start:</b>
<b>Staffing Completed:</b>	<b>GIT Start:</b>
<b>SS Train Start:</b>	<b>SS Train End:</b>
<b>DC Start:</b>	<b>DC End:</b>

**Other Project**

**Team Members:**

**Other Project** Respondent Lookup

**Names:**

**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

<b>Report Period</b>	Mar, 2021 (TSME21-RCLS (425196) )	<b>Project Phase</b>	Implementing
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**Risk Level** On Track

**Monthly Update** No new work this month.

**Special Issues**

<b>Cost</b>	<b>Total Cost to Date (Direct + Indirect):</b>	6,561.32
<b>Mar 31, 2021</b>	<b>Estimated Cost at Completion (E\$AC):</b>	6,561.32
	<b>Total Budget:</b>	15,000.00
	<b>Variance (Budget minus E\$AC):</b>	8,438.68
	<b>Reason For Variance:</b>	No new work this month

Projections  
Mar 31, 2021

Dollars Projected For Month: 369.99  
Actual Dollars Used: 0.00  
Variance (Projected minus Actual): 369.99  
Reason For Variance: No new work this month

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:	20,000.00	Indirect Budget:	0.00	Total Budget:	20,000.00										
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	<table><tr><td>PreProduction Start:</td><td>Pretest Start:</td></tr><tr><td>Pretest End:</td><td>Recruitment Start:</td></tr><tr><td>Staffing Completed:</td><td>GIT Start:</td></tr><tr><td>SS Train Start:</td><td>SS Train End:</td></tr><tr><td>DC Start:</td><td>DC End:</td></tr></table>						PreProduction Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
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															

<b>Report Period</b>	Mar, 2021 (TSME21-Replayer (425267)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	On Track		
<b>Monthly Update</b>	During the month, the team focused on programming and testing bug fixes in the Replayer utility. In addition, the team continued began programming and documenting the set-up and deployment of the utility as outlined in the Phase II proposal.		
<b>Special Issues</b>			



**Cost**  
**Apr 07, 2021**

***Total Cost to Date (Direct + Indirect):*** 9,325.00  
***Estimated Cost at Completion (E\$AC):*** 18,874.77  
***Total Budget:*** 20,000.00  
***Variance (Budget minus E\$AC):*** 1,125.23  
***Reason For Variance:*** Minimal variance between total budget and estimated cost to complete.

**Projections**  
**Apr 07, 2021**

***Dollars Projected For Month:*** 3,597.31  
***Actual Dollars Used:*** 3,170.98  
***Variance (Projected minus Actual):*** 426.33  
***Reason For Variance:*** Minimal variance.

**Measures**

	Units Complete	RR	HPI
<i><b>Current Goal:</b></i> <i><b>Goal at Completion:</b></i> <i><b>Current actual:</b></i> <i><b>Estimate at Complete:</b></i> <i><b>Variance:</b></i>			

**Other Measures**