Survey Research Operations

Monthly Project Report

Sponsored

July 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
(CAMS 2021) HRS 2021 Consumption and Activity Mail Study
(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
(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 (Spring)) HRS 2021 Off-Year Mail Study / COVID Survey
(HRS2022-NewCohort) HRS 2022 - New Cohort
(MARS 2) Malaysia Ageing and Retirement Study Wave 2
(MTF base year 2017-2022) Monitoring the Future - Base Year 2017-2022
(MTF NR 2021) Monitoring the Future Nonresponse 2021
(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

NonArchived Sponsored Projects

Project	Type	Status	Project Lead	Jan	Feb	Mar	Apr	May	Jun	Jul
ACL6	Sponsored	Current	Terri Ann Ridenour	🟢	🟢	🟢	🟡	🟡	🟡	🟡
ACL-LIFE	Sponsored	Current	Terri Ann Ridenour	🟡	🟡	🔴	🔴	🔴	🔴	🟡
AFHS	Sponsored	Current	Rebecca Gatward	🟢	🟢	🟢	🟢	🟢	🟢	🟡
ALS Controls	Sponsored	Current	Rebecca Loomis	⬜	🟢	🟢	🟢	🟢	🟢	🟢
BFY	Sponsored	Current	Piotr Dworak	🟢	🟢	🟢	🟢	🟢	🟢	🟢
C.A.R.E.	Sponsored	Current	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢	🟢	🟢	🟢
CAMS 2021	Sponsored	Current	Deborah Zivan	⬜	⬜	⬜	⬜	⬜	🟢	🟢
CBII	Sponsored	Current	Maureen Joan O'Brien	🟢	🟢	🟢	🟡	🟡	🟡	🟢
CDS-19	Sponsored	Current	Rachel Anne Orlowski	🟢	🟢	🟢	🟢	🟢	🟢	🟢
DAWN CS	Sponsored	Current	Juan Carlos Donoso	🟡	🟡	🟡	🟡	⬜	⬜	🟢
ECHO	Sponsored	Current	Terri Ann Ridenour	🟢	🟢	🟢	🟢	🟢	🔴	🟡
EDC-Semi Structured	Sponsored	Current	Karin Schneider	🟢	🟢	🟢	🟢	🟢	🟢	🟢
H&WB	Sponsored	Current	Juan Carlos Donoso	🟡	🟡	🟡	🟡	⬜	🟡	🟢
HCAP 2020	Sponsored	Current	Maureen Joan O'Brien	🟢	🟡	🟡	🟡	🟡	🟢	🟢
HCDC, H&C	Sponsored	Current	Barbara Lohr Ward	🟢	🟢	🟢	🟢	🟢	🟢	🟢
HRS 2020	Sponsored	Current	Evanthia Leissou	🟡	🟡	🟡	🟡	🟡	🟢	🟢
HRS 2020 ABT	Sponsored	Current	Evanthia Leissou	🟡	🟡	🟡	🟡	🟡	🟡	🟢
HRS 2021 OYMS / COVID Survey (Spring)	Sponsored	Current	Ian Ogden	⬜	🟢	🟢	🟢	🟢	🟢	🟢
HRS2022-NewCohort	Sponsored	Current	Evanthia Leissou	⬜	⬜	⬜	⬜	⬜	⬜	🟢
MARS 2	Sponsored	Current	Margaret Lee Hudson	🟢	🟢	🟢	🟢	🟢	🟡	🟡
MTF base year 2017-2022	Sponsored	Current	Rebecca Gatward	🟢	🟢	🟢	🟢	🟢	🟢	🟢
MTF NR 2021	Sponsored	Current	Lloyd Fate Hemingway	⬜	⬜	⬜	⬜	🟢	🟢	🟢
MTF Panel (main data collection) 2021	Sponsored	Current	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢	🟢	🟢	🟢
PSID21	Sponsored	Current	Shonda R Kruger-Ndiaye	🟡	🟡	🟡	🟡	🟡	🟡	🟡
SCA 2021	Sponsored	Current	Theresa Camelo	🟢	🟢	🟢	🟢	🟢	🟢	🟢
STARRS-LS Waves 3 & 4	Sponsored	Current	Meredith A House	🟢	🟢	🟢	🟢	🟢	🟢	🟢
VCT	Sponsored	Current	Andrew L Hupp	🟢	🟢	🟢	🟢	🟢	🟢	🟢
WMH-Qatar	Sponsored	Current	Sarah Elisa Broumand	🟢	🟢	🟢	🟢	🟢	🟢	🟢

Project Name	(ACL6) Americans' Changing Lives - Wave 6		
Project Mode	Primary: Telephone Secondary: Face to Face Total of Modes: 2		
Project Type	Sponsored Projects	**Project Status**	Current
Budget	*Direct Budget:* 495,251.00 *InDirect Budget:* 277,340.00	*Total Budget:*	772,591.00

Principal Investigator/Client Margaret Hicken (University of Michigan, SRC - SEH)

Funding Agency National Institutes of Health, National Institute on Aging

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

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

Proposal #: no data

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

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

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

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

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

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

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

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

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

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

Milestone Dates

PreProduction Start:		*Pretest Start:*	
Pretest End:		*Recruitment Start:*	
Staffing Completed:		*GIT Start:*	
SS Train Start:	05/20/2021	*SS Train End:*	08/10/2021
DC Start:	06/17/2021	*DC End:*	11/14/2021

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	July, 2021 (ACL6)	**Project Phase**	Implementing
Risk Level	*Some Concerns*		

Monthly Update

ACL6 (reboot) data collection has resumed. Right now we have 53 eligible sample lines and 11 completed interviews.

We are currently authorized by the PI to spend up to $44,200 direct costs ($69,000 total) to complete 10 additional ACL6 interviews. Although ACL6's original overrun was approved by the PI and the budget was increased accordingly, the funding for the reboot will be allocated only after the actual costs are known.

We have not fully projected in CRS to reflect the ballpark estimate of $44,220 (direct high). Since the fund is not

actually allocated to us, we did not add the budget to the original ACL6. Instead, Nick wants us to keep an eye on the "costs vs. benefits," and report to him (and the PI, Maggie) with actual costs accumulated each month.

The plan was that we need to control the costs that are within the ballpark estimate at the end of the reboot, and he will cover the accumulated costs either equal to the ballpark estimate or less. So it's important that we do not exceed the ballpark estimate. We have projected hours for Stephanie (data management), Pooja (production management), Debra (project support) and Terri (Project Lead) to reflect in RFT for time reporting purposes.

Because Nick (Study Office) allocated funds to cover the original ACL6 overrun, the overrun now projected in this report represents the full, estimated cost of the reboot (assuming 10 iws).

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

Special Issues

Cost
Aug 17, 2021

Total Cost to Date (Direct + Indirect):	784,474.67
Estimated Cost at Completion (E$AC):	804,563.98
Total Budget:	772,591.00
Variance (Budget minus E$AC):	-31,972.98
Reason For Variance:	Please see Monthly Updates.

Projections
Aug 17, 2021

Dollars Projected For Month:	2,461.45
Actual Dollars Used:	2,709.27
Variance (Projected minus Actual):	-247.82
Reason For Variance:	Data management charges due to ACL6 (Tel-only Reboot) activity. Delivering DRI recordings to client (for their QC efforts), removing finalized lines off of laptops, and other DBA tasks. Also, we've incurred charges related to requesting new ACL6 ToA checks, sending new study packets, respondent follow up, project coordination and interviews.

Measures

	Units Complete	RR	HPI
Current Goal:	1,058 (1,526 sample)	80%	5
Goal at Completion:			
Current actual:	740	55%	6.7
Estimate at Complete:			
Variance:			

Other Measures   Home Visit Consent

Goal at Completion: 700

Current Actual: 413
Current Undecided: 20

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

				Project Status	Current
Budget	*Direct Budget:*	520,637.00	*InDirect Budget:* 291,556.00	*Total Budget:*	812,193.00

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

Funding Agency

IRB   *HUM#:*   HUM00177366   *Period Of Approval:*   2/5/2021 -

Project Team
Project Lead:	Terri Ann Ridenour
Budget Analyst:	Grace Tison
Production Manager:	
Senior Project Advisor:	Shonda R Kruger-Ndiaye
Production Manager:	
Production Manager:	Pooja Varma-Laughlin

Proposal #:   no data

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

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

Milestone Dates

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

Other Project Team Members:

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

TBD: Production Assistant

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

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

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

Andrea Pierce: Help Desk

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

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

Monthly Update

On 7/9/21, we held a PI / production check in meeting with Sarah Burgard (PI), Grace Tison (Finance), Nicholas Prieur (Study Office Budget), Pooja (Production Manager), Shonda (SPA) and me (Project Lead)

The goal of our meeting was to revisit proposed strategies remaining to address Sarah's #1 priority (i.e. increase response rate) in the remaining data collection period (6 weeks + additional weeks TBD); and to plan a follow up meeting to discuss associated costs.

Production Summary

-- 6 weeks (out of 26 total) remaining in our current ACL-Life data collection period
-- 13 iws/wk (10 wks avg.)
-- 145 iwer hrs/wk (10 wk avg.)
-- 7.14 HPI (total cumulative)
-- 9 active interviewers, 2 team leaders and 2 locators currently staffed
-- Target Interviews: 986 (80% RR)
-- Actual Interviews: 491 (40% RR)

Intervention Strategies & Scenarios

Implemented:

-- Increased ToA ($50)
-- Increased ToA ($100)
-- Added Locator
-- Used MSG batch services to support locating
-- Postcard (SIMY) mailing: all non-final sample
-- Targeted mailing: addressing concerns/confidentiality (in progress)

Proposed:

-- Do anything we can to increase response rate! "Kitchen sink approach" - less concerned about budget (Nick's response)
-- Continue to announce the increased incentive ($100)
-- Extend data collection for 4-12 weeks (get through to October, after summer)
-- Establish a specific end date for extension phases: 4 weeks, 8 weeks and then 12 - depending on the availability of Iwers, etc.
-- Send multiple mailings (at least 2 additional mailings beyond the 26 weeks of data collection) - consider priority mail
-- Prepare / Send End Game Post Card mailing
-- Increase ToA again for "true" End Game offer and universal approach in remaining weeks (up to $300)
-- Extend locating resources beyond August
-- Identify any locating efficiencies / determine overall status of locating efforts
-- Plan for skeletal / consolidated staff: Iwers (~5) with 75% of hours previously worked (Pooja to negotiate with staff)
-- Send batch email using approved text / reply-to (so production can monitor)
-- Tweak formatting or material used for current mailings (e.g. different color envelope or something not requiring

IRB);

-- Review latest batch of hard refusals / unables; no longer pursue and finalize cases to increase efficiency on remaining sample

-- Submit required IRB amendment(s)

The more time we can extend data collection, the better. Although we all agreed that it might not yield the response rate we're hoping for (80% targed).

Special Issues

Cost
Aug 17, 2021

Total Cost to Date (Direct + Indirect):		623,475.64
Estimated Cost at Completion (E$AC):		881,653.26
Total Budget:		812,193.00
Variance (Budget minus E$AC):		-69,460.26
Reason For Variance:		We had projected a direct cost overrun of $41,554 (~9%). In response to this projected overrun, on 7/5/21 Nick allocated an additional $50K direct (via budget reallocation to SRO). He said they have some carry forward funds that he can't guarantee they'll have in the future. He indicated that he'd rather be proactive about handling it instead of trying to fund it on the back end.

We agreed to continue to monitor and work to find efficiencies over time to stay within the overall budget.

Nick also expressed overall concerns about re-charge rate fee change communication. The message was forwarded to the project SPA who then forwarded to SRO Admin.

The main drivers are as follows:

Fringe Benefits increases due to more staff hours being projected than originally budgeted; $47,951 funds were set aside for FB; given the staff assigned to the work and the hours projected, we now project to need $63,722 for FB. ($17,441)

($16,124) Hybrid Staff model - includes Survey Techs and Field IWER with higher Field rate

($12,372) Programming additional Blaise requirements for Life History Grid functionality and enhancements requested by PI

($8,555) Other Recharges: CAPI for Field Iwers/ rates increase; H&T rate increased from $1.10 to $1.39; CASIC initially increased from $1.91 to $2.01 and then to $2.50 starting in March 2021; higher mobile fees

($4,853) Respondent incentives increase from $30 to $50 (as of 5/12/21); and from $50 to $100 (as of 7/8/21

($4,423) Help Desk support (only 40 hours 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\May\ACLlife Cost Needs Spreadsheet 6-15-21.xlsx

Projections
Aug 17, 2021

Dollars Projected For Month:		84,937.28
Actual Dollars Used:		69,820.49
Variance (Projected minus Actual):		15,116.79

Reason For Variance: The Interviewer hours projected are much higher than actuals this month. As of of 7/9/21, there are 9 active interviewers, 2 TLs and 2 Locators on the team. This month the team focused on contact attempts goals and completing interviews.

Respondent incentives projected were also higher than actuals.

Measures

	Units Complete	RR	HPI	
Current Goal:	986 (n=1,284-54 NS)	80%	5	
Goal at Completion:				
Current actual:	501	40%	7.27	
Estimate at Complete:				
Variance:				

Other Measures

Project Name	(AFHS) American Family Health Study
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	01/2019 - 03/2022
Data Col Period	05/2020 - 01/2022
Security Plan	NA

Milestone Dates

PreProduction Start:	05/03/2019	*Pretest Start:*	
Pretest End:		*Recruitment Start:*	
Staffing Completed:		*GIT Start:*	
SS Train Start:		*SS Train End:*	
DC Start:	04/21/2020	*DC End:*	01/31/2022

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	July, 2021 (AFHS)
Project Phase	Implementing

Risk Level	*Some Concerns*

Monthly Update	July update

- received IRB approval 7/22.
- worked with DataForce on Replicate 2 on respondent materials.
- SRO continued to work on updates to technical systems for Replicate 2.
- sample selected for Replicate 2.
- responded to data queries and DMSS (Wen) have worked on adding some additional outcome variables to the case level file - requested by PI.

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

Cost
Aug 17, 2021

Total Cost to Date (Direct + Indirect):	1,581,367.10
Estimated Cost at Completion (E$AC):	2,454,595.60
Total Budget:	2,490,133.00
Variance (Budget minus E$AC):	35,537.40
Reason For Variance:	Any underspend will be used by the end of the project on interventions to boost response.

Projections
Aug 17, 2021

Dollars Projected For Month:	507,964.38
Actual Dollars Used:	140,115.14
Variance (Projected minus Actual):	367,849.24
Reason For Variance:	Like last month, the variance is because a large invoice from DataForce was not paid in July.

Measures

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

Other Measures

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

Project Status   Current

Budget	**Direct Budget:**	163,550.33	**InDirect Budget:**	91,589.18	**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

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

Other Project Team Members:	Dan Zahs (Sampling)
Other Project Names:	
Sample Mgmt Sys	NA
Data Col Tool	Other (Qualtrics)
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, R
Administration	ISR Group (SRC Business Office)
Payment Type	Check, post (10)
Payment Method	NA

Report Period	July, 2021 (ALS Controls)	**Project Phase**	Implementing
Risk Level	On Track		

Monthly Update	July 2021: Three large mailings went out this month. The invitation mailing now includes the baseline of the Grand Rapids and Midland areas plus added sample near to Ann Arbor for a total of 1,370 pieces; this will be the standard size of the monthly invitation mailings going forward. July also saw the mailing of a reminder letter to all the lines that were sent an invitation letter from October 2020 through May 2021. A total of 3,769 pieces of ALS mail were sent out in July in the hopes of raising the number of survey completes and subsequent blood draw consents for the PI team. We have indeed seen an uptick in screener completes this month, to the client's pleasure.
Special Issues	

Cost
Aug 12, 2021

Total Cost to Date (Direct + Indirect):	47,085.63
Estimated Cost at Completion (E$AC):	183,749.21
Total Budget:	255,139.51
Variance (Budget minus E$AC):	71,390.30
Reason For Variance:	The project underrun has increased since we updated the reminder mailing estimated costs for future projections.

Projections
Aug 12, 2021

Dollars Projected For Month:	16,120.24
Actual Dollars Used:	7,508.61
Variance (Projected minus Actual):	8,611.63
Reason For Variance:	The last of the three mailings in July to be processed by PrintCopyMail did not hit the cost report this month. The underrun will be rolled forward to August.

Measures

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

Other Measures

Project Name	(BFY) Baby's First Years
Project Mode	Primary: Face to Face Total of Modes: 1
Project Type	Sponsored Projects

Project Status Current

Budget   **Direct Budget:** 4,602,680.00   **InDirect Budget:** 1,825,015.73   **Total Budget:** 6,427,695.73

Principal Investigator/Client	Dr. Greg Duncan (University of California - Irvine) Dr. Kimberly Noble (Teachers College Columbia University) Dr. Katherine Magnuson (University of Wisconsin)
Funding Agency	National Institute of Child Health and Human Development (NICHD)
IRB	**HUM#:** HUM00137963 **Period Of Approval:**
Project Team	**Project Lead:** Piotr Dworak **Budget Analyst:** Janelle P Cramer **Production Manager:** Barbara Aghababian-Homburg **Senior Project Advisor:** Stephanie A Chardoul **Production Manager:** Margaret Lavanger **Production Manager:** Anthony Romanowski
Proposal #:	no data

Description:

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

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

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

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

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

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

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

Milestone Dates

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

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

Other Project Names: HHICD Household Income and Childhood Development

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

- -

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

Risk Level *On Track*

Monthly Update Project updates:

BFY Age 3 data collection had a smooth launch continues on goal in week 7 with +11 interviews ahead of the cumulative goals. BFY project has been awarded extension funding to continue past 3-year interview and stay in touch with the families and update the contact information. SRO will re-contact Rs 3.5 and 6.5 months after the focal child 3rd b-day and then, at 46 months (Age 3 + 10 months) SRC will pass contact information for the families to the research labs which will invite respondents to the Age 4 lab visit. The handoff of the contact information concludes SRC involvement in the Age 0 - 4 part of the project. We have retained all 11 interviewers and the same TLs and added + 2 OS with BFY locating experience and + 1 experienced bilingual interviewer in NOLA who left in Age 2 and came back in Age 3 for a total of 14 interviewers. We set out to hire 2 bilingual iwers in NOLA and NE to make sure we can effectively work on locating Latinx Rs. However, we cannot find a candidate in NE (one recruited NH opted-out after hearing about the new vaccination requirement).

Data collection / Sample:

Age 3 results by site through week 7:

	Goal	Actual	+/-
Overall	61	72	11
Nebraska		20	27	7
New York		25	26	1
Minnesota		3	3	0

Louisiana   13   16   3

Staffing:

Age 3 Staffing:
14 iwers in total
NE: 1
MN: 2
NY: 6 OS
NOLA: 3
Locators: 2"

Technical system:

BFY had a relatively smooth launch despite having some new MSMS components rolled out (ability to text using QR code, etc.).
 However, certain system took a bit longer to set up due primarily to the availability within the tech team. BFY is still working

Analysis of Age 2 data revealed 18 cases which were missing small part of Section F Blaise Child Activities section. The cause is not known but the data is available in ADT and the tech team is currently working on recovery.

Finances:

Total project overrun has been decreasing and is staying below the level communicated and approved by the PIs.

Additional funding for Age 3 - 4 has been allocated in draft projections and it will become part of the overall Age 1 - 4 budget.

Special Issues

Cost
Aug 10, 2021

Total Cost to Date (Direct + Indirect):	5,631,651.00
Estimated Cost at Completion (E$AC):	6,818,967.39
Total Budget:	6,427,695.73
Variance (Budget minus E$AC):	-391,271.66
Reason For Variance:	The PI approved overrun is $435 and since March 2021 we are continuing to stay under the agreed level and increasing savings.

Projections
Aug 10, 2021

Dollars Projected For Month:	142,272.10
Actual Dollars Used:	134,584.68
Variance (Projected minus Actual):	7,687.42
Reason For Variance:	Lower billing from management team, TSG (vacations and conflicts with other projects). Lower HPI and iwer time while still meeting goals.

Measures

	Units Complete	RR	HPI
Current Goal:	61	6%	7.0
Goal at Completion:	907	93%	7.0
Current actual:	72	7%	5.4
Estimate at Complete:	907	93%	6.0
Variance:			

Other Measures

Project Name	(C.A.R.E.) Concussion Assessment, Research and Education (CARE) Consortium

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

Project Type   Sponsored Projects   **Project Status**   Current

Budget   ***Direct Budget:***   1,144,724.28   ***InDirect Budget:***   320,931.14   ***Total Budget:***   1,537,084.42

Principal Investigator/Client
Dr. Steven Broglio (U of M Kinesiology)
Dr. Michael McCrea (Medical College of Wisconsin)
Dr. Thomas McAllister (Indiana University School of Medicine)

Funding Agency
IRB   ***HUM#:***   ***Period Of Approval:***
Project Team   ***Project Lead:***   Donnalee Ann Grey-Farquharson
                          Budget Analyst: Mary Johnson
                          Production Manager: Barbara Aghababian-Homburg
                          Senior Project Advisor: Barbara Lohr Ward
                          Production Manager:
                          Production Manager:

Proposal #:   no data

Description: This budget assumes an overall SRO involvement period of 24 months commencing in January 2019 with data collection taking place during a 20-month period, beginning April 2019. The total cost for this work is estimated at $1,034,833 ($821,295 direct, $213,538 indirect), budgeted at the NCAA's published indirect cost recovery rate of 26%.

SRO will provide consultation, respondent location activities and data collection for the NCAA-DoD Grand Alliance (Cumulative and persistent effects of concussion and repetitive head impact exposure: An intermediate follow-up study of US Military Service Academy members and NCAA student-athletes in the CARE Consortium) project. Specifically, SRO will provide consultation on respondent locating and panel maintenance procedures and instruments, locate and contact respondents by mail and phone to prompt them to access the online data collection questionnaire, and conduct telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.

The estimate assumes that approximately 7,500 (approximately 5,000 in the first year and 2,500 in the second year of the project) respondents are included in the initial outreach/email request to complete the online instrument by your research team, and that approximately 20% comply. The remaining 6,000 respondents will be followed up by SRO with locating, further contacts and prompting to complete the web survey. Finally, we anticipate direct outreach by telephone interviewers with access to the online application. All respondent incentives will be paid by the research staff.

SRO Project Period   12/2018 - 08/2021
Data Col Period   02/2019 - 06/2021
Security Plan   NA
Milestone Dates

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

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

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

- -

Report Period	July, 2021 (C.A.R.E.)	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update

Project Management:
- The data collection ended on June 30, 2021 and the post-data collection will be in end of August 2021. Extra funds to cover the newly planned work extension have been received. Projection and budget reflect estimates for this extension.
-Development continues on the management system as does its documentation and the updating of field protocols.
-Started the conversation with the PI on developing the Project Respondent Website for the next wave.
-Started preparing final report to SRC Admin.

Data Manager:
- Continue to refine Dashboard and FPR reporting and QC systems and tools.
- Continue to conduct daily QC
- Analyze production results such as calculating % per mode, per location status etc. for next wave budget estimates.
- Start to collaborate with the PI stats group including brainstorm for next wave design, including # of waves and SID structures

Questionnaire:
- Submitted final CSI questionnaire to research staff for IRB submission.

System
- continue to develop spec and Monitor & troubleshooting for system
- Developing CSMS specification for next wave data collection.
- Continue to communicate with the QuesGen Systems on refining the system for the next wave.

Data Collection:
- One TL is still working on some final manual coding and locating activities

Production Stats as of 07/31/2021:
Overall RR: 34.2%
Total Released Cases: 11990
Total Complete IW: 3785
Total Complete WEB IWs = 3570; CATI Comp IWs= 215

Special Issues

Cost
Jul 31, 2021

Total Cost to Date (Direct + Indirect):	1,436,937.72
Estimated Cost at Completion (E$AC):	1,477,719.62
Total Budget:	1,537,084.42
Variance (Budget minus E$AC):	59,364.80
Reason For Variance:	1.Projection will be adjusted to reflect the full work scope for the post-data collection extension.
	2. Only one TL is wrapping up the field work with very limited hours

Projections
Jul 31, 2021

Dollars Projected For Month:	72,008.88
Actual Dollars Used:	51,044.20
Variance (Projected minus Actual):	20,964.68
Reason For Variance:	1. very limited field hours on wrapping up end of data collection activities.
	2. Preparing post-data collection activities.

Measures

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

Other Measures

Project Name	(CAMS 2021) HRS 2021 Consumption and Activity Mail Study
Project Mode	Primary: Mail Total of Modes: 1
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 293,821.00 **InDirect Budget:** 105,776.00 **Total Budget:** 399,597.00
Principal Investigator/Client	David Weir (ISR-SRC)

Funding Agency

IRB   **HUM#:**   HUM00079949   **Period Of Approval:**   1/28/2021 - 1/27/20

Project Team
Project Lead:	Deborah Zivan
Budget Analyst:	Grace Tison
Production Manager:	
Senior Project Advisor:	Nicole G Kirgis
Production Manager:	Evanthia Leissou
Production Manager:	

Proposal #:   no data

Description: CAMS is part of the Health and Retirement Study (HRS). The goal of CAMS is to gather additional data on household consumption and activities of daily living from participants in the HRS. In 2021, a paper questionnaire will be mailed to approximately 8,000 respondents of which 6,000 will receive the full questionnaire and 2,000 spouse/partners will receive a brief questionnaire.

SRO Project Period   05/2021 - 05/2022
Data Col Period   09/2021 - 04/2022
Security Plan   NA

Milestone Dates

PreProduction Start: 06/01/2021		**Pretest Start:**
Pretest End:		**Recruitment Start:**
Staffing Completed:		**GIT Start:**
SS Train Start:		**SS Train End:**
DC Start: 09/24/2021		**DC End:** 04/30/2022

Other Project Team Members: Data Manager: Laura Yoder
Programmer: Jim Rodgers, Ashwin Dey
Project Assistant: Jeannie Baker, Janet McBride, Melissa Luker

Other Project Names: CAMS

Sample Mgmt Sys   MSMS
Data Col Tool   SAQ
Hardware   Paper and Pencil
DE Software   Other (HRS study staff is responsible for)
QC Recording Tool   N/A
Incentive   Yes, R; Yes, Other (Spouse)
    Administration   SRO Group
    Payment Type   Check, prepaid ($25 to main R and $10 to spouse R)
    Payment Method   Check through STrak RPay System

Report Period   July, 2021 (CAMS 2021)   **Project Phase**   Planning

Risk Level   *On Track*

Monthly Update   Monthly updates: During July, the team worked on questionnaire and respondent material changes. We also coordinated with the HRS Spanish translator. Projections were updated in CRS. The team also submitted the amendment to IRB.

Special Issues

Cost
Aug 11, 2021

Total Cost to Date (Direct + Indirect):	6,349.57
Estimated Cost at Completion (E$AC):	407,372.82
Total Budget:	399,597.00
Variance (Budget minus E$AC):	-7,775.82
Reason For Variance:	Current projections for Cost at Completion assume use of POUR (pay on use return) postage labels which are more expensive than standard BREs. The initial budget assumed use of standard BREs. At this time, we are undecided on using POUR labels. Information from the COVID mailer project will drive our decision. POUR labels are more expensive but have the value of reducing respondent burden by not mailing reminder packets to those respondents whose questionnaires are en route to Ann Arbor.

Projections
Aug 11, 2021

Dollars Projected For Month:	5,267.69
Actual Dollars Used:	3,155.22
Variance (Projected minus Actual):	2,112.47
Reason For Variance:	Staff hours projected in July will be used in future months, projections pushed forward.

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:	5256	66.4%	
Current actual:			
Estimate at Complete:			
Variance:			

Other Measures

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

Project Status   Current

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

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

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

Project Team		
	Project Lead:	Maureen Joan O'Brien
	Budget Analyst:	Carl S Remmert
	Production Manager:	Lisa J Carn
	Senior Project Advisor:	Nicole G Kirgis
	Production Manager:	James Koopman
	Production Manager:	

Proposal #:	no data
Description:	The purpose of the College and Beyond II project is to help educators better understand the importance of students' undergraduate experiences in and out of the classroom to their life-course development. College graduates with an undergraduate degree were invited to participate in a 35-45 minute web survey. Sample was selected from the following universities: The University of Michigan (U-M), Truman State University, the City College of New York (CUNY), Indiana University Bloomington (IU), Georgia College & State University (GCSU), the University of Houston (UH), and the University of California, Irvine (UCI). A pilot was completed in fall 2019. A pilot was completed in 2019 to refine and test the measures used in order to create a questionnaire that could better assess the value of an undergraduate education. The RR goal is ~20% (n=3,000) as well. There is a reminder calling and manual locating effort. R's were invited by letter and email. Each participant will receive a $30 check as a token of appreciation. SRO is responsible for processing checks. Four open-ended occupation/industry questions are included in the survey. This includes, type of work performed, job duties, job title, and specific business/industry. Responses to the occupation questions will be coded by PDMG and SSL staff. The instrument was programmed using Illume, and the sample management system is Blaise SMS. Each day, all sample is delivered from Illume to Blaise via batch process. All non-final sample will be delivered to iwers for reminder calling or locating. Sample with a finalized result code will not be delivered to iwers.
SRO Project Period	10/2020 - 10/2021
Data Col Period	01/2021 - 06/2021
Security Plan	NA

Milestone Dates

PreProduction Start:	10/15/2020	*Pretest Start:*	
Pretest End:		*Recruitment Start:*	11/15/2020
Staffing Completed:	12/15/2020	*GIT Start:*	
SS Train Start:	02/18/2021	*SS Train End:*	02/18/2021
DC Start:		*DC End:*	

Other Project Team Members:	Peter Batra - Programmer and technical lead, former MCBII Pilot Lead, Laura Yoder - Data Ops, Dave Dybicki - Systems Programmer, Grace Tison, 2nd Budget Analyst
Other Project Names:	
Sample Mgmt Sys	SMS
Data Col Tool	Illume
Hardware	Laptop; [UM cell] Phone
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post (30)
Payment Method	NA

Report Period	July, 2021 (CBII)

Project Phase   Implementing

Risk Level   *On Track*

Monthly Update   Data collection officially ended on 7/25/2021 with 2,804 completed interviews. While the goal was to complete 3,000, the PI's were happy with this number completed. Part of the reason for this is that Iwer effort was put toward reminder calling and locating targeted groups that were harder to reach. Sample balance was more important than yield, to the PI's. 607 surveys were completed after having been contacted by reminder callers. Another contributor to lower yield is the emphasis that has been placed on subgroups throughout reminder calling and manual locating. Occupation/industry coding is completed. 2,751 cases contained occ/industry items to code.   Weighting is underway. A final unweighted data file has been delivered, as well as additional data requests including, SID by invitation type. The production manager is working on final coding all sample lines. Once that is complete, the Data Mgr. will create a file including SID by result code, for the project team.

Special Issues   None currently

Cost
Aug 17, 2021

Total Cost to Date (Direct + Indirect):	562,501.62
Estimated Cost at Completion (E$AC):	642,269.14
Total Budget:	643,762.00
Variance (Budget minus E$AC):	1,492.86
Reason For Variance:	Projected cost to close is in good shape.

Projections
Aug 17, 2021

Dollars Projected For Month:	81,476.39
Actual Dollars Used:	89,257.75
Variance (Projected minus Actual):	-7,781.36
Reason For Variance:	More respondent payments hit account than anticipated, as well as Iwer hours.

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:	3000	20%	
Current actual:	2,804	18.7	
Estimate at Complete:			
Variance:			

Other Measures

Project Name	(CDS-19) PSID Child Development Supplement V (2019)
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 2

Project Type	Sponsored Projects		**Project Status**	Current

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

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

Funding Agency	NICHD, Robert Wood Johnson Foundation
IRB	**HUM#:** HUM00166316 **Period Of Approval:** 6/11/18 - 8/4/2021
Project Team	**Project Lead:** Rachel Anne Orlowski
	Budget Analyst: Megan Gomez-Mesquita
	Production Manager: Dianne G Casey
	Senior Project Advisor: Stephanie A Chardoul
	Production Manager:
	Production Manager:

Proposal #:	no data

Description:	A 2019 wave of the Childhood Development Supplement (CDS) is planned for September 2019 – May 2020. The sample for CDS is comprised of the PSID-eligible children (ages 0 -17) from the Core 2019 families we interview and their primary caregivers. Approximately 3,700 families will be included, with some Core families containing several CDS children. As part of the CDS, families are asked to complete multiple interviews (i.e., coverscreen, PCG interview, Child interview--including an IVR component) and data collections (i.e., physical measurements, educational assessments, saliva collection, time diaries, school and birth record linkage forms), several of which are completed in-person. CDS interviewing will be conducted by Field interviewers, with the SSL supporting follow-up efforts. SurveyTrak and Blaise 4.8 will be the primary technical systems employed.

SRO Project Period	09/2018 - 02/2021
Data Col Period	09/2019 - 12/2020
Security Plan	NA

Milestone Dates

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

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

- -

Report Period	July, 2021 (CDS-19)	**Project Phase**	Closing

Risk Level	On Track

Monthly Update	Reconciliation between received respondent components (i.e., saliva samples, linkage forms, time diaries, consents) and the logging database was on-going. Updates to the dashboard (for final reporting purposes) were made.

Special Issues

Cost
Jul 31, 2021

Total Cost to Date (Direct + Indirect):	8,989,773.71
Estimated Cost at Completion (E$AC):	8,997,251.94
Total Budget:	8,965,959.00
Variance (Budget minus E$AC):	-31,292.94
Reason For Variance:	DMSS survival analysis and dataset preparation were not part of original project scope.

Projections
Jul 31, 2021

Dollars Projected For Month:	7,872.03
Actual Dollars Used:	6,254.07
Variance (Projected minus Actual):	1,617.96
Reason For Variance:	Staff projections came slightly below projections--trying to carve time out of current assignments to finish this work.

Measures

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

Other Measures

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

Project Type	Sponsored Projects	**Project Status**	Current

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

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

Milestone Dates

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

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

Report Period	July, 2021 (DAWN CS)	**Project Phase**	Implementing

Risk Level	*On Track*
Monthly Update	- Production was stopped on 7/19 - Final production stats: 207 black completes, 202 MENA completes and 140 white completes - We were not able to reach the goals for white respondents due to the low performance of the SRS sample. - The PI team has requested that we go back to complete interviews with 60 white Rs. This will be a supplemental data collection with a different budget, which will be funded with internal funds from the PIs.

Special Issues
We released 334 SRS sample lines and ended up completing 126 interviews with white Rs, 34 interviews with black Rs and 3 with Rs who identified as MENA. We also had 37 refusals either by the R or an informant.
26 lines were coded out as deceased after the PIs did two rounds of Accurint and there were 108 lines that we were never able to locate (mostly numbers that were inactive or did not exist and numbers that never picked up).

Cost

Total Cost to Date (Direct + Indirect):	471,224.00
Estimated Cost at Completion (E$AC):	471,224.00
Total Budget:	471,057.00
Variance (Budget minus E$AC):	-167.00
Reason For Variance:	Phone charges for interviewers who will participate on the supplemental data collection for an additional 60 interviews with white respondents.

Projections

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

Measures

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

Other Measures

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

Description:

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

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

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

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

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

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

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

Milestone Dates

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

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

Other Project Names:

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

Report Period	July, 2021 (ECHO)	**Project Phase**	Implementing
Risk Level	*Some Concerns*		

Monthly Update [Phase 1: Recruitment and Prenatal Surveys]

Recruitment in 7 prenatal clinics is active and picking up pace. There have been 139 women recruited since 8/18/20 and 122 are still active participants in 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, 991 women have been recruited in clinics. Among those cases, 820 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. The main priority for project Y6 is to complete recruitment to meet this sample target.

A two-week "double incentive" window for all protocols was approved by MSU's IRB and implemented (8/1-8/15/2021). The results were positive. Six 3M interviews were completed within the window and these respondents received $80. The combination of additional sample, the double-incentive window and strong efforts by the field staff allowed us to nearly clear the board of non-final cases (just one remains as of 8/16). Week 169 of 3M data collection has nudged the response rate back up to 73% and the HPI down to 3.68. To see that kind of movement in one week after 3+ years of data collection is significant.

[Phase 2: 3-Month Data Collection Summary]
    Babies born: 718
    3-month sample released: 713
    3-month interviews completed: 506
    3-month biospecimen collected: 309
    Average attempts / Iw: 7.6
    Iw length: 55
    Response Rate: 73%

[Phase 3: Age 4 Protocols]

Pre-production work has started on the Age 4 protocols. The current underrun has presented the team with an opportunity to begin initial planning and documentation of system requirements. Development of a simple sample management system (i.e. SurveyTrak) is planned for use in the administration of the age 4 protocols. In early 2022, after a 5 day training, SRO staff is expected to begin contacting ~81 mothers and children for the Age 4 administration of REDCap surveys, and in-person assessments, physical measures, and the collection of bio-specimens.

Special Issues

Below are responses received, regarding "ECHO Year 6 Update - REDCap" (Email sent to SRO Admin 7/9/21)

7/26/21 (Stephanie's message):
We did discuss in SRO Admin. Though REDCap is out of our comfort zone and we don't love the idea of adding a new technical system to our portfolio right now(!), we acknowledge that we certainly don't want to jeopardize our involvement in ECHO over this and we're willing to move forward. And, there is probably some benefit to future projects/collaborations for us to have this experience.

Can you remind us of the Year 6 budget situation -- do you feel it includes sufficient time for SRO to learn and implement REDCap?

7/26/21 (Terri's response):
I believe our Year 6 budget (combined with the Years 1-4 Carry-forward budget) includes sufficient time for SRO to learn and implement REDCap and support SRO's overall scope of work. Parina, Pete and I had consulted with MSU on the creation of the budget and also worked closely with Rolfe.

I am meeting with Parina tomorrow to update our Y6 projections (cost report and RFT3) using the actual spreadsheet Rolfe used to create the final submitted budget. I will bring to our attention any concerns that we may have.

Also, I wanted to note that we currently have a projected underrun of $77,570 for the current Year 5 budget. My understanding from MSU is that if we (SRO) need additional funds for our Year 6 budget, we may apply for Year 5 Carry-forward funds when they become available (via NIH) sometime in November.

7/26/21 (Gregg's response):
Just to add to this note: My understanding is that our primary challenge will be in teaching our data collection teams to use this tool. It is not a technical challenge. Although it was useful for Marsha to review this platform, there will be little need or opportunity for our technical staff to engage directly with it. We will build a Simple SurveyTrak that will have no interaction with RedCAP. According to Marsha, Interviewers may have to enter some information on both platforms. IN addition, our Help Desk staff will need to direct our Interviewers to MSU for technical problems related to RedCAP.

Cost
Aug 17, 2021

Total Cost to Date (Direct + Indirect):	264,786.20
Estimated Cost at Completion (E$AC):	318,206.44
Total Budget:	407,722.00
Variance (Budget minus E$AC):	89,515.56

Reason For Variance: Year 5 of 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 continues to pick up (Phase 1).

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).

We worked with the proposal team on the project Year 6 proposal budget, which includes additional Age 4 (in-person protocols) and will inevitably require an additional request to use carry forward funds.

Projections
Aug 17, 2021

Dollars Projected For Month:	33,871.99
Actual Dollars Used:	32,364.25
Variance (Projected minus Actual):	1,507.74
Reason For Variance:	

Measures

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

Other Measures

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

Project Status   Current

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

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

Funding Agency

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

Project Team   *Project Lead:*   Karin Schneider
                Budget Analyst: Megan Gomez-Mesquita
                Production Manager: Barbara Aghababian-Homburg
                Senior Project Advisor: Kirsten Haakan Alcser
                Production Manager:
                Production Manager: Rebecca Loomis

Proposal #:	no data
Description:	There are two phases of the project. In Phase 1, the PI provides a selected list of respondents from the EDC Main study, SRO contacts and conduct 140 semi-structured interviews with them by phone. In Spring 2021, the second phase will be a re-interview of these same 140 respondents, also by phone;
SRO Project Period	05/2020 - 06/2021
Data Col Period	08/2020 - 05/2021
Security Plan	NA

Milestone Dates

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

Report Period	July, 2021 (EDC-Semi Structured)

Project Phase   Closing

Risk Level	*On Track*

Monthly Update

Interviewing went well. Draft of final report delivered in late July to PI team. HPI under projection. 124/129 interviews completed for a 96% RR.

Special Issues	None.

Cost
Aug 09, 2021

Total Cost to Date (Direct + Indirect):	362,279.00
Estimated Cost at Completion (E$AC):	374,341.00
Total Budget:	456,620.00
Variance (Budget minus E$AC):	82,279.00

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
Aug 09, 2021**

Dollars Projected For Month:	21,000.00
Actual Dollars Used:	18,500.00
Variance (Projected minus Actual):	2,500.00
Reason For Variance:	In July, we projected to spend $21K direct cost, and actually spent $18.5K, for a monthly direct cost underrun of $2.5K mainly due to slight staff hour underruns.

Measures

	Units Complete	RR	HPI
Current Goal:	129	.95	4
Goal at Completion:	129		
Current actual:	124	.95	4.7
Estimate at Complete:			
Variance:			

Other Measures

Project Name	(H&WB) Health and Wellbeing in Southeast Michigan
Project Mode	Primary: Face to Face Total of Modes: 1

Project Type	Sponsored Projects		**Project Status**	Current

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

Principal Investigator/Client
Kristine Ajrouch (Life Course Development Program, SRC)
Toni Antonucchi (Life Course Development Program, SRC)
Laura Zahodne (Life Course Development Program, SRC)

Funding Agency

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

Project Team

Project Lead:	Juan Carlos Donoso	
Budget Analyst:	Parina Kamdar	
Production Manager:	Theresa Camelo	
Senior Project Advisor:	Kirsten Haakan Alcser	
Production Manager:	Ian Ogden	
Production Manager:	Ian Ogden	

Proposal #:   no data

Description: Conduct 600 interviews with recently identified Arab Americans aged 65 or older residing in Southeast Michigan and 330 interviews with Social Relations sample members aged 65 or older. The Arab American sample will be selected based on an in-person household screening. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements. Social Relations respondents will only complete the cognitive interview. An informant interview will also be conducted for all sample members. Interviews will be conducted in English or Arabic. A pretest will be conducted in August 2019 with main data collection occurring from November 2019 through July 2020.

SRO Project Period   05/2019 - 08/2020
Data Col Period   11/2019 - 07/2020
Security Plan   No
Milestone Dates

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

Other Project Team Members: Taghreid Lovell, Becky Scherr, Kallan Larsen, Dan Zahs, Pam Swanson, Dave Dybicki, Ashwin Dey, Brad Goodwin, John Gawlas, Paul Burton

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

Sample Mgmt Sys   SurveyTrak
Data Col Tool   Blaise 4.8
Hardware   Laptop; [UM cell] Phone; Paper and Pencil
DE Software   Other (Weblog possibly)
QC Recording Tool   DRI-CARI; Camtasia
Incentive   Yes, R; Yes, INF
   Administration   SRO Group
   Payment Type   Cash, prepaid ($60, $15)
   Payment Method   Interviewer payment of cash (reimbursed/reconciled via Tenrox)

Report Period	July, 2021 (H&WB)	**Project Phase**	Planning

Risk Level   *Some Concerns*

Monthly Update   Project Paused/No activity

Special Issues

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

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

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

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

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

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

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

1.- Programming hours:

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

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

2.- Salary costs:

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

3.- COVID Bank hours:

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

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

Cost
Jul 31, 2021

Total Cost to Date (Direct + Indirect):	997,834.00
Estimated Cost at Completion (E$AC):	2,369,496.00
Total Budget:	2,317,801.68
Variance (Budget minus E$AC):	-81,694.00
Reason For Variance:	
	The projected overrun increased because of 2022 salary increases and recharges.

Projections
Jul 31, 2021

Dollars Projected For Month:	0.00
Actual Dollars Used:	736.00
Variance (Projected minus Actual):	-736.00
Reason For Variance:	Telephone charges. JC will follow up with Parina.

Measures

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

Other Measures

Project Name	(HCAP 2020) Harmonized Cognitive Assessment Protocol, 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

Project Team	**HUM#:** HUM00099822	**Period Of Approval:**
	Project Lead:	Maureen Joan O'Brien
	Budget Analyst:	Richard Warren Krause
	Production Manager:	Dianne G Casey
	Senior Project Advisor:	Evanthia Leissou
	Production Manager:	
	Production Manager:	

Proposal #:	no data
Description:	Building off the 2016 Harmonized Cognitive Assessment Protocol (SRO #15-0011R01) experience, this project will involve the completion of a face-to-face CAPI interview, designed to provide a dementia assessment of HRS respondents. A sample of 4649 respondents (one per household) who are 65 years of age or older will be selected for this effort. The questionnaire will be administered to respondents after their HRS 2020 interview has been completed. The sample will not be clustered geographically. We propose to staff a team of approximately 32 interviewers. It is expected that this team will carry out well-planned regional trips in order to complete the 3200 in-person interviews. The respondent questionnaire length is expected to be 60 minutes. An informant interview will also be completed for each of the respondents interviewed. The informant questionnaire is expected to be 25 minutes and can be administered by telephone.
SRO Project Period	01/2020 - 12/2021
Data Col Period	07/2020 - 08/2021
Security Plan	NA

Milestone Dates

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

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

- -

Report Period	July, 2021 (HCAP 2020) **Project Phase** Planning
Risk Level	On Track
Monthly Update	Regarding production start date, the project team has decided to postpone until Summer, 2022, to follow HRS 2022. This will follow the original design of 2020 in which HCAP R's would first complete their HRS interview then become HCAP sample. The plan is to continue with a FTF interview. Development of the HCAP Video training for Ireland is complete. All cognitive interview training videos have been

delivered and are under review by Ireland groups (TILDA and NICOLA). 2 more short videos - Intro and outro - are being finalized. SRO will meet with Ireland groups in early September to discuss any questions Ireland has, and possible SRO involvement needed for their Iwer trainings. Ireland has reached out with more requests, including Blaise code which has been approved. That will be delivered via SFTP this week. This will likely turn into more work, as Ireland may need assistance understanding code and already has questions about reporting and Iwer QC. Project lead is compiling list of additional requests so that we can secure resources where needed.

Special Issues   Production training and production launch have been postponed to Summer, 2022 due global pandemic.

Cost
Aug 17, 2021

Total Cost to Date (Direct + Indirect):	183,370.48
Estimated Cost at Completion (E$AC):	4,236,467.64
Total Budget:	4,488,000.00
Variance (Budget minus E$AC):	251,532.36
Reason For Variance:	The budget was healthy and was fully funded. We are adding efforts in to benefit the project - see below for detail.

Projections
Aug 17, 2021

Dollars Projected For Month:	722.16
Actual Dollars Used:	710.90
Variance (Projected minus Actual):	11.26
Reason For Variance:	n/a

Measures

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

Other Measures

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

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

Project Type	Sponsored Projects		**Project Status**	Current	
Budget	**Direct Budget:** 9,806,418.00	**InDirect Budget:** 2,236,640.00	**Total Budget:** 12,043,058.00		

Principal Investigator/Client Sandra Newman (Johns Hopkins University)
Tama Leventhal (Tufts University)

Funding Agency NICHD, HUD, RWJ Foundation, MacArthur Foundation

IRB **HUM#:** HUM00114794 **Period Of Approval:**

Project Team

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

Proposal #: no data

Description:

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

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

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

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

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

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

- -

Report Period	July, 2021 (HCDC, H&C)	Project Phase	Closing

Risk Level *On Track*

Monthly Update

During July 2021, SRC activities included the following:

Task 1: Management, Budget and Work Plan
% Task Spent to Date
- Reviewed/monitored project expenses. Revised and adjusted monthly projections.
- Monitored subcontracts, project invoicing and payments. Followed up on unpaid invoices.
- Final Deliverables (see Final Data Deliverables for more detail)
o Prepared and delivered addendum to Final Data Collection report
o Responded to PI questions
o Made arrangements for supplemental Quality Control review of 100 completed interviews

Task 2: Sampling
% Task Spent to Date
- Responded to client questions about delivered data

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

Task 4: CAI Programming
% Task Spent to Date
- No activity this month.
-
Task 5: Systems Programming
% Task Spent to date
- Time was accidentally charged by a programmer. This charge will be reversed.
- Conducted routine maintenance and backups on HCHD survey databases.

Tasks 6, 7: Interviewer Recruitment & Hiring, Training
% Task Spent to Date
- No activity this month

Task 8: Main Data Collection
% Task Spent to Date
- Managed production activities necessary to support Social Security form data collection:
o Logged and scanned incoming Social Security forms.
☐ Uploaded scanned forms to SFTP
o Managed respondent payments
☐ Mailed respondent incentives; reconciled cash/gift card funds.
- Prepared supplies for shipment to offsite storage

Task 9: Post Collection Processing
% Task Spent to Date
- No activity this month

Task 10: Weighting

% Task Spent to Date
• No activity this month

Task 11: Final Data Deliverables
% Task Spent to Date
• See Task 1 Management for activities

Special Issues

Areas of Concern (changes shown in italics):
Wave 2
• Delivery of non-PII data to ICPSR will be delayed until September 2021. Data delivery for HCHD was requested by the NICHD program officer. The level of effort required for this activity is as yet unknown.
• 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 Replay Mail.
• Assuming that SRO has the use of all awarded NICHD funds, the project is projecting an underrun estimated between $45,000 and $70,000 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 for archiving data at ICPSR as well as continued requests for data investigation and support from the research team. 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.

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
Aug 11, 2021

Total Cost to Date (Direct + Indirect):	11,940,624.57
Estimated Cost at Completion (E$AC):	11,968,806.30
Total Budget:	12,043,058.00
Variance (Budget minus E$AC):	74,251.70
Reason For Variance:	Work scope changes resulting from the pandemic (switch from FTF to Telephone) have resulted in a direct cost underrun. This underrun may ultimately be used by PI requests for extra assistance with data deliverables or for panel maintenance activities.

Projections
Aug 11, 2021

Dollars Projected For Month:	21,303.25
Actual Dollars Used:	24,610.87
Variance (Projected minus Actual):	-3,307.62
Reason For Variance:	The monthly overrun is due to BFY team members accidentally charging to the HCHD shortcodes. These charges will be reversed.

Measures

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

Other Measures

Project Name	(HRS 2020 ABT) HRS 2020 COVID Antibody Test
Project Mode	Primary: Mail Total of Modes: 1
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 601,330.00 **InDirect Budget:** 216,479.00 **Total Budget:** 817,809.00
Principal Investigator/Client	David Weir (SRC) Jessica Faul (SRC)
Funding Agency	NIH
IRB	**HUM#:** HUM00061128 **Period Of Approval:** 8/20/20-8/19/21

Project Team

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

Proposal #:   no data

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

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

Milestone Dates

PreProduction Start:	09/01/2020	**Pretest Start:**	10/09/2020
Pretest End:	10/15/2020	**Recruitment Start:**	09/22/2020
Staffing Completed:	01/15/2021	**GIT Start:**	
SS Train Start:	01/25/2021	**SS Train End:**	
DC Start:	10/19/2020	**DC End:**	08/31/2021

Other Project Team Members:	Andrew Hupp, Debbie Zivan Dan Tomlin, Tony Romanowski, Daniah Buageila, Anna Fuqua-Smith, Janet McBride, Jim Rodgers, Laura Yoder, Holly Ackerman, Pam Swanson, Deb Wilson, David Bolt, Matt Hanger, Tricia Blanchard, Lloyd Hemingway, Dianne Casey, Gary Hein.
Other Project Names:	HRS Antibody, Antibody Project
Sample Mgmt Sys	MSMS
Data Col Tool	Other (COVID Antibody Saliva Kit, Paper/Pencil)
Hardware	Laptop; Desktop; [UM cell] Phone; Paper and Pencil
DE Software	Other (MSMS)
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, prepaid ($20)
Payment Method	Check through STrak RPay System

Report Period	July, 2021 (HRS 2020 ABT) **Project Phase** Implementing
Risk Level	*On Track*

Monthly Update

All test kits were mailed out by December 20, 2020 and all reminder postcards mailed by January 7, 2021. Reminder calling was conducted through mid-March 2021.

Minnesota delivered results for all but six respondents as of the end of July. The lab continued to receive samples, although small numbers, during the month. Consent logging, result letter mailings, and respondent support (follow-up to calls and emails) continued through the month.

As of 8/10/21 the overall response rate was at 44% (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: 7,122 (44%)
  Refusals: 1,805 (11%)
  Deceased: 112 (1%)
  Received Vaccine: 420 (2%)
  Undeliverable - No Forwarding Address: 111 (1%)
  Pending response: 6,718 (41%)

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.
PI decision mid-July for the Minnesota lab to continue to receive samples through August 30, 2021. SRO work expected to continue through September 2021.

Cost
Aug 17, 2021

Total Cost to Date (Direct + Indirect):	907,902.75
Estimated Cost at Completion (E$AC):	772,872.14
Total Budget:	817,809.00
Variance (Budget minus E$AC):	44,936.86
Reason For Variance:	Cost to Date includes the cost of all checks issued for respondent incentives. We have increased the percent of expected check voids in projections as the outstanding checks remain high, which is prereflected in the cost at completion. We are estimating a $36,209.50 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 July . CASIC rate change from $2.01 to $2.50 has been applied in CRS. The Minnesota lab will accept samples through August 30, 2021 so SRO will continue a low level of activities on this project through September.

Projections
Aug 17, 2021

Dollars Projected For Month:	8,493.42
Actual Dollars Used:	5,752.06
Variance (Projected minus Actual):	2,741.36
Reason For Variance:	The variance is due primarily to postage. In addition, there was one erroneous charge of $1,152.85 in July which will be credited to the project. Projections have been adjusted in future months.

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:	10,587	65%	
Current actual:	7,122	44%	
Estimate at Complete:	7,122	44%	
Variance:	3,465	21%	

Other Measures

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

Funding Agency

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

Proposal #:	no data
Description:	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.
SRO Project Period	01/2019 - 08/2021
Data Col Period	03/2020 - 03/2021
Security Plan	NA

Milestone Dates

PreProduction Start:	01/01/2019	**Pretest Start:**	11/11/2019
Pretest End:	11/23/2019	**Recruitment Start:**	09/01/2019
Staffing Completed:	12/15/2019	**GIT Start:**	02/17/2020
SS Train Start:	02/19/2020	**SS Train End:**	02/26/2020
DC Start:	03/02/2020	**DC End:**	05/02/2021

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

---

Report Period	July, 2021 (HRS 2020)	**Project Phase**	Closing
Risk Level	*On Track*		
Monthly Update	Date collection began March 2nd. A couple weeks into March, in person data collection was halted due to COVID19 restrictions. All preferred mode TEL sample was released to the field and all preferred mode FTF sample was approved for phone interviews. Fifty percent of the preferred mode FTFe were approved for phone interviews with release mid June with the remainder released at the end of September. 3,849 web lines had been released as of August with the non-response follow-up being conducted by field interviewers in SurveyTrak. Limited effort protocol		

was put on hold in August with 1,000 cases re-activated in SurveyTrak for work by field interviewers. A subset of field sample was moved to web in January and February for a two-week protocol. Once the protocol was completed, the non-final cases were moved back to the field. Data collection ended May 2, 2021.

The team continued to focus SAQ/SSA mailings, SSA reminder calling, logging, data deliveries, processing equipment returns, and respondent support.

Measures noted in tables below are as of 5/18/21

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
Aug 17, 2021

Total Cost to Date (Direct + Indirect):	15,727,389.68
Estimated Cost at Completion (E$AC):	15,759,816.33
Total Budget:	16,267,431.00
Variance (Budget minus E$AC):	507,614.67
Reason For Variance:	The 6 year renewal proposal, which includes 2020, was based on a targeted dollar amount. 2020 original projections (approved by project staff) were based the 2018 response rate and 2018 actuals. Estimated under-run is due to the change in study protocol in response to COVID19 with all of the FTF and enhanced FTFe cases approved for mode change to TEL, stopping interviewer SSA linkage consent, stopping WBD protocol, changing SAQ and SSA to be administered via mail with a phone follow-up, and COVID hours charged to date. Costs for transcription of one COVID question, SAQ and SSA mail protocol, and CASIC rate change have been added. We have requested an updated estimate from DataForce for the remainder of their 2020 work now that the SAQ mail protocol is complete.

Projections
Aug 17, 2021

Dollars Projected For Month:	90,943.23
Actual Dollars Used:	92,860.57
Variance (Projected minus Actual):	-1,917.34
Reason For Variance:	The primary reasons for the variance are 1) checks for the SSA protocol hit in July instead of August as had been projected, and 2) staff hours were higher than projected in part due to July being a 3 bi-weekly pay period. Future projections have been adjusted accordingly.

Measures

	Units Complete	RR	HPI
Current Goal:	17,201	74%	7.0
Goal at Completion:	17,201*	74%	7.0
Current actual:	17,108	73.6%	7.1
Estimate at Complete:	17,108	73.6%	7.1
Variance:	93	0.4%	0.1

Other Measures   *including preferred mode web

Project Name	(HRS 2021 OYMS / COVID Survey (Spring)) HRS 2021 Off-Year Mail Study / COVID Survey
Project Mode	Primary: Mail Total of Modes: 1
Project Type	Sponsored Projects

		Project Status	Current
Budget	**Direct Budget:** 650,029.66	**InDirect Budget:** 234,010.34	**Total Budget:** 884,040.00

Principal Investigator/Client
Dr. David Weir (UM-ISR (SRC-HRS))
Dr. Helen Levy (UM-ISR (SRC-HRS))

Funding Agency National Institutes of Health (NIH)

IRB

HUM#:	HUM00196577	**Period Of Approval:**	

Project Team

Project Lead:	Ian Ogden
Budget Analyst:	Grace Tison
Production Manager:	Pooja Varma-Laughlin
Senior Project Advisor:	Evanthia Leissou
Production Manager:	Ian Ogden
Production Manager:	

Proposal #: no data

Description: 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).

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.

The sample size for this project is significantly larger than other "off-year" mail studies such as LHMS. Relatedly, and also unlike past instances of HRS off-year mail studies, it is expected that this sample will overlap with HRS CAMS.

SRO Project Period	03/2021 - 12/2021
Data Col Period	05/2021 - 12/2021
Security Plan	NA

Milestone Dates

PreProduction Start:	03/01/2021	**Pretest Start:**	
Pretest End:		**Recruitment Start:**	
Staffing Completed:		**GIT Start:**	
SS Train Start:	06/08/2021	**SS Train End:**	06/08/2021
DC Start:	05/28/2021	**DC End:**	12/31/2021

Other Project Team Members:
Technical Leads: Ian Ogden & Jim Rodgers
MSMS Developer: Pam Swanson & Jim Rodgers
Data Manager: Laura Yoder
Project Support 1: Jeannie Baker (Replacing Becky Scherr, as of late-June, 2021)
Project Support 2: Melissa Luker
Project Support 3 (Locating Only): Debra Heier
Project Support 4 (RPay & Mailing-Support Only): Anna Fuqua-Smith

Other Project Names:	HRS 2021 Off-Year Mail Study
	HRS 2021 OYMS (COVID)
Sample Mgmt Sys	HRS 2021 Spring COVID Survey
Data Col Tool	N/A
Hardware	HRS 2021 Perspectives on the Pandemic Survey
DE Software	Other (MSMS DCA)
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, prepaid
Payment Method	Check through STrak RPay System

Report Period	July, 2021 (HRS 2021 OYMS / COVID !	**Project Phase**	Implementing

Risk Level — *On Track*

Monthly Update — ITO (8/16/2021): Updates pending; will finalize by EoD Tuesday, 8/17.

[Production - Intake & Processing]
- Weekly intake of new questionnaires continues to decline; whether this project will ultimately reach a 60% RR is possible, but unknown.
- Locating efforts have just concluded and further unrequested-remails are suspended as of 8/16/2021 to allow a rest period before CAMS.
- A small, supplemental mailing (n=133) was sent on 8/11; this was prepared due to the previously-reported issue of some non-unique Tracking Numbers having been assigned to production cases by USPS (and these cases being wrongly excluded from a reminder mailing).

[Production Data-Out]
Longer-than-expected open-ended responses have slowed the data delivery process slightly (weekly processing capacity at DataForce = 800-850 per week); it is expected that data-delivery will be caught up with questionnaires received by mid-late September.

[Operational Data-Out & Cross-Project Coordination]
SRO-HRS has made available some resources to work on a process for moving NAPE updates captured in MSMS into the central HRS records database (the "Update Database"). This will be essential for ensuring such updates captured in a third-party environment (i.e. MSMS) can be quickly and reliably migrated into central records upon conclusion of an ancillary study in MSMS.

Also working closely with CAMS and Fall COVID Survey teams to pass along lessons learned and recommended technical refinements.

[HRS 2021 OYMS / COVID Survey (Fall)]
General planning is underway, though approval of the proposed budget has not yet been approved. Some time-sensitive tasks are coming due (e.g. material refinements --> translation --> IRB; coordinating request of initial checks), so we hope to begin on these soon. It is expected that in some (perhaps all) ways, the Fall COVID Survey will generally be treated as a project distinct from the Spring COVID Survey (e.g. sample, systems, budget, team).

Special Issues — (1) Developing and implementing repeatable systems, protocols and procedures in supporting an HRS Mail Study data collection in MSMS;
(2) Evaluating use of Pay-On-Use-Return labels as part of standard reminder mailing protocol; in our case, in lieu of USPS Priority as the service used for the final reminder mailing (due to (a) reported reliability issues with USPS Priority in 2021 and (b) operational utility of package-tracking on returns from initial mailing). In essence, trading the "motivation-factor" of a USPS Priority envelope for operational benefits of return-tracking on the initial mailing.

Cost
Aug 16, 2021

Total Cost to Date (Direct + Indirect):	776,926.37
Estimated Cost at Completion (E$AC):	908,657.97
Total Budget:	884,040.00
Variance (Budget minus E$AC):	-24,617.97

	Reason For Variance:	Primary drivers:

Primary drivers:
(1) Some additional technical hours projected (DataOps support, MSMS development support), some of which have resulted in higher Fringe Benefits costs;
(2) Survey Tech hours increased from 09/2021-12/2021 to reflect potential long-tail logging needs and 800# support.
(3) Higher-than-budgeted needs for Jeannie Baker and Ian Ogden; these hours may drop off significantly as the project begins to wind down.

It is possible / likely the EAC will come down as a result of:
(1) Potential to reduce ST hours from 10/2021-12/2021 (potentially overestimated, but will depend on logging / 800# needs)
(2) Total charges from DataForce potentially coming in at less than was projected

Projections
Aug 16, 2021

Dollars Projected For Month:		64,832.22
Actual Dollars Used:		54,455.00
Variance (Projected minus Actual):		10,377.22
Reason For Variance:		July, 2021: Most staff projections were generally accurate (minor variances in SSA and SSI hours). Major sources of this variance: (1) [Higher-than-expected costs] More ST hours were needed than were projected (including both Logging and 800# support) - $2,600 higher than projected; (2) [Lower-than-expected costs] Projected costs from DataForce were ~$6,000 lower than projected (Serv. of Others); (3) [Lower-than-expected costs] ~$7,400 worth of checks were voided.

Measures

	Units Complete	RR	HPI
Current Goal:	11,200	80.0%	N/A
Goal at Completion:			
Current actual:	7,743	56.0%	
Estimate at Complete:			
Variance:			

Other Measures

Project Name	(HRS2022-NewCohort) HRS 2022 - New Cohort
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	*Direct Budget:* 15,796,862.00 *InDirect Budget:* 8,480,994.00 *Total Budget:* 24,277,856.00
Principal Investigator/Client	David Weir (SRC) Helen Levy (SRC) Ken Langa (SRC)
Funding Agency	
IRB	*HUM#:* *Period Of Approval:*

Project Team

Project Lead:	Evanthia Leissou
Budget Analyst:	Richard Warren Krause
Production Manager:	
Senior Project Advisor:	Nicole G Kirgis
Production Manager:	Andrew L Hupp
Production Manager:	

Proposal #:	no data
Description:	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample.
SRO Project Period	02/2021 - 01/2024
Data Col Period	03/2022 - 01/2024
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	SurveyTrak; Other ((Blaise) Case Management App (CMA))
Data Col Tool	Blaise 5
Hardware	Laptop; [UM cell] Phone; Paper and Pencil
DE Software	N/A
QC Recording Tool	Camtasia; N/A
Incentive	Yes, R; Yes, INF
Administration	SRO Group
Payment Type	Check, post; Cash, post
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest C

Report Period	July, 2021 (HRS2022-NewCohort) **Project Phase** Planning
Risk Level	*On Track*
Monthly Update	In July Andrew began reviewing the materials for listing training and began updating the listing manual. Address sorting began in July with three PDMG staff and has been going slower than expected. We have reached out to DCO (incl. SSL) to see what regular and temp staff may have some time to dedicate to the task. The sorting has been divided into high priority segments (98) and low priority segments (806). The high priority segments are those that we may need to list. They are either currently below the minimum measure of size (75) or were in the top

10% of the difference between the Census total and the number of addresses MSG provided.

We are getting together the 2016 respondent materials so they can be revised for the pretest IRB submission which is the beginning of September. The team is working through modifications to the screener to offer a self-administered web version. Andrew H will write a basic rule set since MSMS will be needed to manage access to the survey. Andrew will work with Karl and Marsha on a mechanism to get the data from Blaise to SurveyTrak. The plan is to use SurveyTrak for the creating of mail sample lines and for reporting. We will likely offer a gift code to at least a portion of cases and will use a set-up similar to VCT to have MSMS send an email/text with the code once the screener has been completed.

Special Issues

Cost
Aug 10, 2021

Total Cost to Date (Direct + Indirect):	351,881.46
Estimated Cost at Completion (E$AC):	24,018,385.95
Total Budget:	24,277,856.00
Variance (Budget minus E$AC):	259,470.05
Reason For Variance:	Projections will be refined as we go. There are a lot of moving pieces and some unknowns at the moment.

Projections
Aug 10, 2021

Dollars Projected For Month:	351,231.66
Actual Dollars Used:	136,246.88
Variance (Projected minus Actual):	214,984.78
Reason For Variance:	Due to staff availability some staff have been pulled into other HRS related tasks and have not devoted the time expected. Projections need to be revised.

Measures

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

Other Measures

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

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

Project Type Sponsored Projects   **Project Status** Current

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

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

Funding Agency Health and Retirement Study

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

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

Proposal #: no data

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

SRO Project Period 01/2020 - 09/2021
Data Col Period 09/2020 - 08/2021
Security Plan NA

Milestone Dates

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

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

Other Project Names:

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

Report Period	July, 2021 (MARS 2)

Project Phase   Implementing

Risk Level   *Some Concerns*

Monthly Update   COVID cases continue to rise in Malaysia and nearly-nationwide lockdowns have prohibited FTF work in most areas. Very limited telephone work has continued in cases where there was good contact information. We are looking at extending data collection into 2022. The SWRC and SRO teams will be meeting in August to strategize on completing Wave 2 production by Feb 2022.

Special Issues   Project manager Jay Lin will be ending his position with SRO in late October. We are making transition plans internally and with our SWRC partners.

Cost
Aug 17, 2021

Total Cost to Date (Direct + Indirect):	205,408.46
Estimated Cost at Completion (E$AC):	238,859.94
Total Budget:	254,702.00
Variance (Budget minus E$AC):	15,842.06
Reason For Variance:	No international travel, however the project continues to be extended because of slow production due to pandemic. Funds continue to be pushed forward.

Projections
Aug 17, 2021

Dollars Projected For Month:	10,359.24
Actual Dollars Used:	5,818.23
Variance (Projected minus Actual):	4,541.01
Reason For Variance:	Production was nearly completely idle this month due to nationwide lockdowns in Malaysia than prohibit FTF work; limited phone work continues when possible. Data management tasks and other support was reduced this month due to limited production.

Measures

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

Other Measures

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

Project Mode   Primary: Class SAQ   Total of Modes: 1

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

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

Principal Investigator/Client   Richard Miech (Survey Research Center)

Funding Agency   National Institute on Drug Abuse, one of the National Institutes of Health.

| **IRB** | ***HUM#:*** | 00131235 | ***Period Of Approval:*** | 2/3/2021 - 2/2/2022 |

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

Proposal #:   no data

Description:

The Monitoring the Future study is an epidemiological and etiological research project begun in 1975. The project functions as a basic research study, as well as one of the nation's major sources of reliable information on trends in smoking, drinking and drug use.

It is based on two interconnected series of surveys using nationally representative samples:

(a) self-administered annual in-school surveys of 8th, 10th, and 12th graders (~45,000) in 400 schools.

(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 newsletter is mailed to panel members. If the newsletter is returned (undelivered) locating effort targets these panel members and others who have not participated for X years. The web panel launches (web) in spring and in around June a telephone non-response effort begins for those invited to participate. The panel members are recruited from the 12th graders who participate in the base year study.

SRO Project Period   04/2017 - 04/2022
Data Col Period   02/2018 - 06/2022
Security Plan   Yes

Milestone Dates

PreProduction Start:	04/30/2017	***Pretest Start:***	
Pretest End:		***Recruitment Start:***	
Staffing Completed:		***GIT Start:***	
SS Train Start:		***SS Train End:***	
DC Start:		***DC End:***	06/04/2022

Other Project Team Members:

Rebecca Gatward	Survey Director
Gregg Peterson	Senior Project Advisor
Hueichun Peng	Technical Lead
Minako Edgar	Data Management
Marsha Skoman	SurveyTrak Programmer
Ashwin Dey	WebTrak, MTF specific Apps. Programmer
Peggy Lavanger	Production Manager (Lead)
Barbara Aghababian-Homburg	Production Manager
Debra Heier	Project Assistant
David Bolt and Deborah Wilson	Help Desk/Tablets
Mary Johnson	Budget Analyst

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

- -

Report Period	July, 2021 (MTF base year 2017-2022)	**Project Phase**	Planning

Risk Level *On Track*

Monthly Update
July updates
- Like this past base year, we are planning on accomodating remote and in-person survey administrations for the next base year (2022). We have decided to continue using a web survey (Illume) which will be completed by students who are remote and in-school. Students will also continue to use their own devices for data collection regardless of whether the interviewer is leading the survey administration in-person (we will not be using tablets and SurveyCTO).
- A small team has begun planning a back-up solution for the small (if any) schools that do not have an internet connection. This will probably be a portable server (other options considered are satellite internet, hotspots)
- Peggy and I have begun working on preproduction tasks for BY2022 during the summer.

Special Issues

Cost
Aug 17, 2021

Total Cost to Date (Direct + Indirect):	5,747,918.56
Estimated Cost at Completion (E$AC):	6,830,684.38
Total Budget:	7,316,931.00
Variance (Budget minus E$AC):	486,246.62

Reason For Variance:	- Wave 1 (2017-18) & Wave 2 (2018-19) - 50 supplemental school admins (not budgeted)
- Wave 2 travel costs were higher than budgeted due to staff availability.
- Wave 3 (2019-2020) - 500 additional tablets were purchased. The cost of these and other necessary equipment was not budgeted.
- Wave 4 - below budget because data collection was halted on 13 March (due to COVID pandemic all FTF research was halted). All data collection costs were below those projected.
- Wave 5 - Due to change in data collection design (new web mode) IWER hours and other costs associated with in person school admins are are lower than originally projected (based on initial assumptions about the IWERs role in the remote admins and the number of in person admins and travel costs). Hours required by SRO staff have also been reduced - projections are still included for some FTF admins beginning in May 2021. It is unlikely that these admins will take place in-person.

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

The salary and non-salary cost projections for wave 4 (2021) have been revised based on the assumption that the majority of the school administrations will be conducted in web mode (remote or in-school). The hours required for Field Researchers to conduct the remote admins and the number of remote and in person admins are estimated. We have compared these estimates with actual interviewer hours used during the pilot, the estimates seem to be at an appropriate level. We will review actual interviewer hours during production to ensure that projected hours are at the appropriate level.
The projected costs for 2021 have been updated to include Illume charges for completed surveys ($.95 per submitted survey).

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

Projections
Aug 17, 2021

Dollars Projected For Month:	30,860.62
Actual Dollars Used:	35,735.64
Variance (Projected minus Actual):	-4,875.02
Reason For Variance:	Source of variance are salary and non-salary costs that were not projected for July - expecting that costs related to the end of production would have been charged in June.
Final Illume costs (per survey) were also charged in July - again, I had expected these would have been charged in June.

Measures

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

Other Measures

Project Name	(MTF NR 2021) Monitoring the Future Nonresponse 2021				
Project Mode	Primary: Telephone	Total of Modes: 1			
Project Type	Sponsored Projects		**Project Status**	Current	
Budget	**Direct Budget:** 209,911.00	**InDirect Budget:** 117,550.00	**Total Budget:**	327,461.00	

Principal Investigator/Client
John Schulenberg (UM - Survey Research Center)
Richard Miech (UM - Survey Research Center)
Megan Patrick (UM - Survey Research Center)

Funding Agency

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

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

Proposal #:   no data

Description: Monitoring the Future Non-Response is a tracking/reminder calling project for MTF follow-up panels. The respondents in these panels originally completed self-administered questionnaires dealing with attitudes toward social issues and behaviors such as alcohol, drug, and tobacco use when they were in the 12th grade. As a sub-sample of the MTF in-school administrations, they receive an invitation to complete a follow-up survey online or with a paper SAQ at regular intervals well into adulthood. The Non-Response project is designed to contact and remind panel members who have not completed their questionnaire. 2021 is the first time all respondents will be able to complete the survey online.

SRO Project Period   03/2021 - 10/2021
Data Col Period   05/2021 - 08/2021
Security Plan   NA
Milestone Dates

PreProduction Start: 03/01/2021	*Pretest Start:*
Pretest End:	*Recruitment Start:* 03/01/2021
Staffing Completed: 04/13/2021	*GIT Start:*
SS Train Start: 05/19/2021	*SS Train End:* 05/19/2021
DC Start: 05/20/2021	*DC End:* 08/18/2021

Other Project Team Members: Programmers: Peter Sparks, Ashwin Dey, Dave Dybicki
Data Manager: Minako Edgar

Other Project Names:

Sample Mgmt Sys	SMS
Data Col Tool	Other (Respondent Locating Module (RLM))
Hardware	Laptop; Desktop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	N/A
Incentive	Not used
Administration	ISR Group (Youth, Education, and Society (YES) Program)
Payment Type	Check, prepaid ($20 or $25)
Payment Method	Other (Checks issued and sent by MTF)

- -

Report Period	July, 2021 (MTF NR 2021)	**Project Phase**	Implementing

Risk Level   *On Track*

Monthly Update   Progress continued as expected. One interviewer had to leave the project due to health reasons. Calling time was lost on two occasions when there were power issues at Perry (one outage, one surge), but there was no significant attrition of scheduled hours. Quality of work remained high, according to project staff, who review all finalized cases.

Special Issues   None

Cost
Jul 31, 2021

Total Cost to Date (Direct + Indirect):	202,618.37
Estimated Cost at Completion (E$AC):	339,820.35
Total Budget:	327,461.00
Variance (Budget minus E$AC):	-12,359.35
Reason For Variance:	The primary driver of the variance is the use of field interviewers in the role budgeted for survey techs. This is not a cause for concern, as the full 5-year budget (ending in 4/22) still projects an underrun.

Projections
Jul 31, 2021

Dollars Projected For Month:	125,222.58
Actual Dollars Used:	120,540.75
Variance (Projected minus Actual):	4,681.83
Reason For Variance:	Projection rate for Survey Tech I and II is slightly higher than staff average salary.

Measures

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

Other Measures

Finds per Hour: Goal=1.0, Actual=1.52
Finalized Cases per Hour: Goal=1.75, Actual=1.89
Attempts per Hour: Goal=12.0, Actual=12.88

Project Name	(MTF Panel (main data collection) 2021) Monitoring the Future Panel (web) 2021
Project Mode	Primary: Web Total of Modes: 1
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 729,094.00 **InDirect Budget:** 405,907.00 **Total Budget:** 1,135,001.00
Principal Investigator/Client	John Schulenberg (UM-SRC)

Funding Agency

IRB	**HUM#:** HUM-0013R02 **Period Of Approval:** In continuing Review	
Project Team	**Project Lead:** Donnalee Ann Grey-Farquharson	
	Budget Analyst: Mary Johnson	
	Production Manager:	
	Senior Project Advisor: Gregg Peterson	
	Production Manager: Rebecca Gatward	
	Production Manager:	
Proposal #:	no data	

Description: This project is a continuation of MTF Illume Web 2020. The new budget has been combined with previous to allow for "additional funding" of the continuing portion and includes some development/programming work for 2021.

PI staff will edit and test 12 survey versions, all previously programmed in Illume by SRO. SRO will further test the surveys as part of the systems integration process. All 12 surveys will be launched in 2021. After testing is complete, SRO will launch the 2021 Web survey data collection with an estimated sample size of 20,000 cases identified by the Principal Investigator who will deliver the contact information including e-mail address to SRO. The Web survey data collection will replace aspects of the standard mail-based data collection. Both the separately funded Winter Location calling effort and Non-Response follow-up calling will include this sample – with the calling effort being integrated with the standard MTF activities.

This budget assumes an overall SRO involvement period of 12 months commencing in January 2021 with the data collection taking place during a 7-month period, beginning April of 2021. The total cost for this work is estimated at $355,783 ($228,066 direct, $127,717 indirect), budgeted at the currently negotiated on-campus recovery rate of 56%.

SRO Project Period	01/2021 - 12/2021
Data Col Period	04/2021 - 10/2021
Security Plan	NA

Milestone Dates

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

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

Report Period July, 2021 (MTF Panel (main data colle **Project Phase** Implementing

Risk Level *On Track*

Monthly Update 1. Conducted an experiment to re-contact a batch of undelivered email addresses
2. SSL interviewers continue making the reminder calls to the Non-response cases
3. Continue to monitor progress on data collection effort

Production Data: as of 07/31/2021
Total Sample: 21589
Total completes: 8578
Response Rate: 39.73%

Special Issues

Cost
Jul 31, 2021

Total Cost to Date (Direct + Indirect):	963,892.68
Estimated Cost at Completion (E$AC):	1,113,683.70
Total Budget:	1,135,001.00
Variance (Budget minus E$AC):	21,317.30
Reason For Variance:	The amount of underrun will be adjusted in August.

Projections
Jul 31, 2021

Dollars Projected For Month:	28,470.37
Actual Dollars Used:	18,556.30
Variance (Projected minus Actual):	9,914.07
Reason For Variance:	The amount of underrun will be adjusted in August.

Measures

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

Other Measures

Project Name	(PSID21) Panel Study of Income Dynamics 2021
Project Mode	Primary: Telephone Secondary: Web Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 4,447,019.00 **InDirect Budget:** 2,464,457.00 **Total Budget:** 6,911,476.00
Principal Investigator/Client	David Johnson (UM) Katherine McGonagle (UM) Narayan Sastry (UM)
Funding Agency	NSF, NIA, NICHD, The Office of the Assistant Secretary for Planning and Evaluation of the United States, DHHS, The Econom
IRB	**HUM#:** HUM00062417 **Period Of Approval:** 8/20/2020 - 8/19/202

Project Team

Project Lead:	Shonda R Kruger-Ndiaye
Budget Analyst:	Megan Gomez-Mesquita
Production Manager:	Stacy Quisenberry
Senior Project Advisor:	Stephanie A Chardoul
Production Manager:	Sarah Crane
Production Manager:	Rachel Anne Orlowski

Proposal #:   no data

Description: PSID (known to Respondents as the Family Economics Study or FES) is a longitudinal survey of several thousand individuals and their families, carried out since 1968 and conducted every two years. The sample is comprised of respondents from the 4,800 original families as well as new (immigrant) sample added in 1997/1999 and 2017/2019. The total 2021 sample size will be approx. 11,200, with approx. 9,700 completed interviews expected.   Most of the information collected is about family composition and changes (marriages, divorces, births, deaths, people moving in and out), income sources and amounts, employment and pensions and wealth. There are also questions about housing, education, vehicles, health, and money spent on food, healthcare, and school. The main focus is on how these family composition and financial factors interact with each other and how they change over time. The 2021 instrument also features questions related to the impact of COVID on the family.

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

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

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

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

Milestone Dates

PreProduction Start:	04/01/2020	**Pretest Start:**	09/28/2020
Pretest End:	10/25/2020	**Recruitment Start:**	10/15/2020
Staffing Completed:	12/02/2020	**GIT Start:**	
SS Train Start:	02/24/2021	**SS Train End:**	03/05/2021
DC Start:	03/18/2021	**DC End:**	12/31/2021

Other Project Team Members:

Other Project Names:	Family Economics Study 2021, PSID Core 2021
Sample Mgmt Sys	MSMS
Data Col Tool	Blaise 5
Hardware	Laptop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	Camtasia
Incentive	Yes, R; Yes, Other (Proxy, Locator)
Administration	ISR Group (PSID)
Payment Type	Check, post (Varies)
Payment Method	Check through other system (PSID-RAPS); Other (Electronic RPay)

- -

Report Period	July, 2021 (PSID21)	**Project Phase**	Implementing

Risk Level   *Some Concerns*

Monthly Update

Production slightly exceeded goals for 2 of the 4 weeks of July, but more significantly fell short of goals in the other two weeks. We have been working with the PIs to estimate possible final production outcomes using a variety of techniques. It's clear that without significant intervention, and without the possibility of extending data collection we will fall short of the 89% RR target (upon which our goals have been constructed to-date. Per a 8/18 PI meeting, we will begin using 84% are our new RR target. It is still optimistic, but significant interventions are in the works. We learned in August that the PSID PIs have been meeting with Steven and James to strategize and discuss subselection designs.

Interventions in July included:
--Ending the Web Special Offer (+$20) for Web Soft Launch 4 lines.
--Beginning calling on Web Soft Launch 4.
--Launching the Web Special Offer (+$20) for English Web and Final English Web Lines.
--Inviting non-final TAS Ringfence lines (n = 81) to web.
--Moving Web SIDs that had neither email nor text-enabled cell phones (n = 54) into PhoneWeb.
--Sent "Corrected Link" email to the outstanding lines that received an email with the self-scheduler link (n = 73)
--Sending a batch Web Special Email reminder to non-final English Web and Final English Web Lines.
--Ending the Web Special Offer (+$20) for English Web and Final English Web Lines.
--Beginning calling on English Web and Final English Web Lines.

Technical issues still affecting iwers' work (Partial list): completed SIDs sometimes appear in iwers' active sample; non-final SIDs sometimes *don't* appear in iwers' active sample; emails can take a very long time to send (e.g. 8 - 15 minutes each); texts are sometimes not recorded in the system as contact attempts (this issue is believed to have been fixed for emails); some iwers occasionally sync and have all of their sample disappear; some technical issues require sync reset, with the post-rests sync taking many hours (even 24 hours).

As of and 8/10 MSMS release, we can now use MAP to transfer sample.

In addition to the iwer-related issues, we continue to face and work to address a variety of data-related problems.

July/early August has featured significant testing and troubleshooting of the Splitoff process. As of 8/19, Splitoff processing has not yet begun in Production, however, is expected to begin imminently.

Special Issues

Cost
Jul 31, 2021

Total Cost to Date (Direct + Indirect):	4,043,432.34
Estimated Cost at Completion (E$AC):	7,396,280.50
Total Budget:	6,911,476.00
Variance (Budget minus E$AC):	-484,804.50

Reason For Variance: Our projected direct cost overrun has increased by $51K from $262K to $313K. Most of this increase (~$39K) is due to increased interviewer salary costs, from minimal overtime in July and increasing the projected average interviewer rate to accommodate current interviewer average rates and minimal future overtime. The previous interviewer rate used was based on the staffing list at the beginning of production including differentials. The remaining overrun increases were due to regular staff increases, mostly in TSG (Kevin, Pam, Lihshwu, Kyle).

ACA costs were high in June but decreased in July, so we opted not to raise future projections.

Note: The Total budget was updated this month from $6,917,068.00 total to $6,911,476.00. PSID received a small amount of additional money from IUPUI for this wave, which isn't charged any indirect cost but does have Research & Development and ISR Personnel fees. This affects our budget only because the R&D and Personnel fees increased the direct cost budget by $13K. The projected overrun is unaffected by these changes as we still have the same amount of direct cost allocated for project expenses.

**Projections
Jul 31, 2021**

Dollars Projected For Month:	792,175.66
Actual Dollars Used:	797,385.09
Variance (Projected minus Actual):	-5,209.43

Reason For Variance: This overrun can be attributed almost completely to higher field interviewer costs for the month. The average interviewer rate was slightly higher, and overtime and holiday pay were quite a bit higher than the previous month. The OT we're experiencing on the project appears driven primarily by the interviewers we have working in states with special--more generous--OT rules.

Measures

	Units Complete	RR	HPI	
Current Goal:	6269	61.1%	6.0	
Goal at Completion:	9694	89%	7.5	
Current actual:	6241	60.8%	6.0	
Estimate at Complete:	9694	89%	7.5	
Variance:	0	0	0	

Other Measures All Measures reported through the last completed week (through 8/14). Our goals are reassessed each week, with variance in weekly performance leading to updates of future weeks. Rachel or Shonda can share assessments of current production to original goals upon request.

Note: Per the 8/18 PI meeting decision, we will lower the overall target yield and RR, and raise the target HPI in the August MPR.

Project Name	(SCA 2021) Surveys of Consumer Attitudes
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 Carn **Senior Project Advisor:** Shonda R Kruger-Ndiaye **Production Manager:** **Production Manager:**
Proposal #:	no data
Description:	The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations. The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 600 interviews.
SRO Project Period	12/2020 - 12/2021
Data Col Period	01/2021 - 12/2021
Security Plan	NA

Milestone Dates

PreProduction Start:	**Pretest Start:**
Pretest End:	**Recruitment Start:**
Staffing Completed:	**GIT Start:**
SS Train Start:	**SS Train End:**
DC Start: 01/02/2021	**DC End:** 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	July, 2021 (SCA 2021)
Project Phase	Implementing
Risk Level	On Track
Monthly Update	SCA July 2021 began as scheduled on 6/23/2021, and ended as scheduled on 7/26/2021. We completed 604 IWs (322/181/101), four IWs above our goal of 600 (320/180/100); at an overall hpi of 2.97 (.03 below our budgeted hpi of 3.0).

Special Issues

Cost
Aug 11, 2021

Total Cost to Date (Direct + Indirect):	639,939.68
Estimated Cost at Completion (E$AC):	1,110,909.70
Total Budget:	1,122,582.00
Variance (Budget minus E$AC):	11,672.30
Reason For Variance:	reduced hpi

Projections
Aug 11, 2021

Dollars Projected For Month:	117,049.15
Actual Dollars Used:	114,668.58
Variance (Projected minus Actual):	2,380.57
Reason For Variance:	reduced hpi

Measures

	Units Complete	RR	HPI
Current Goal:	600		3.0
Goal at Completion:	600		3.0
Current actual:	604		2.97
Estimate at Complete:	604		2.97
Variance:	4		-.03

Other Measures

Project Name	(STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 8,196,521.00 **InDirect Budget:** 4,590,892.00 **Total Budget:** 12,787,413.00
Principal Investigator/Client	James Wagner (University of Michigan) Robert Ursano (Uniformed Services University of the Health Scienc) Murray Stein (University of California San Diego)
Funding Agency	Department of Defense
IRB	**HUM#:** HUM00180765 **Period Of Approval:** 6/3/2020 - 6/2/2021

Project Team

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

Proposal #:   no data

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

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

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

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

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

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

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

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

Report Period	July, 2021 (STARRS-LS Waves 3 & 4)	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update

- ☐ We have released six replicates (6,291 sample lines) and completed 4,482 interviews as of August 3.
- ☐ We continued bi-weekly meetings with the ODUSA to coordinate Safety Plan and respondent locating activities.
- ☐ The Year 2 subaward agreement package was processed by U-M ORSP and sent back to HJF for signatures.
- ☐ Our financial analyst worked on transferring costs from Year 1 to Year 2 to come close to a zero balance on the Year 1 account.
- ☐ Work continued on an analysis of the areas in our budget where spending is more than anticipated. When completed, the information will be shared with the PIs.
- ☐ We continued to work on plans for moving from Box to Google Shared Drive for cross-organization file sharing.
- ☐ We received and took action on due-outs from the June 15 GSC meeting.
- ☐ IRB:
- o James and Meredith met with U-M OGC and an Asst. Privacy Officer regarding the General Data Protection Regulation (GDPR) as it relates to STARRS-LS data collection with soldiers who are physically located in the European Union.
- o Work continued on an amendment, two continuing reviews and two ORIOs.
- ☐ The Enclave team carried out hardware and software retirement activities in the Windows and Linux environments.
- ☐ The final NDI data file (through 2019) and documentation were delivered to the Enclave.
- ☐ We continued work on biomarker group requests for assistance, including tracking status of the requests from Boston Children's Hospital.
- ☐ The ICPSR quarterly report was sent to USUHS/ODUSA.
- ☐ We sent a ballpark budget estimate and memo describing the task of adding biosample flags and RUIDs to the ICPSR holdings to Dr. Ursano.

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

☐   In the past 6 months, we have reported four ORIOS for protocol deviations or respondent complaints related to the Safety Plan follow-up by Chaplains. Two of the four were related to Wave 3 interactions, one was related to Wave 2, and one to Wave 1. The frequency of reporting ORIOS of this nature has been more frequent than in past waves. In Wave 1, we reported a total of 4 ORIOS related to the Safety Plan follow-up by Chaplains. At that time, the U-M IRB requested a meeting with James and Nancy G. to discuss possible ways to improve the process for active Army respondents. The ODUSA took steps to raise awareness among the Chaplain Corps of the requirements of the Safety Plan. That seemed to help because we reported only 1 ORIO of this nature in Wave 2. With increased frequency of reports in Wave 3, we could be questioned again by the U-M IRB. We have notified the IRB that the ODUSA is planning briefings with the Chaplain Corps to reinforce the Safety Plan procedures and confidentiality requirements.

☐   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. Note that the higher costs have not allowed us to readily absorb changes, like unanticipated increases in rates and fees. 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, this information will be shared 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 form that ends up not being acceptable to the VA when it comes time to request health records data for linkage. While unlikely, it's also possible the approved MHS HIPAA form might not be acceptable to the providers of those data.

☐   The risk related to the VA not having reviewed the HIPAA form prior to production was highlighted in the June 15 GSC meeting when a question was raised as to whether the VHA HIPAA consent language would allow access to VBA data.

☐   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 5 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
Jul 31, 2021

Total Cost to Date (Direct + Indirect):	2,625,526.00
Estimated Cost at Completion (E$AC):	13,255,498.00
Total Budget:	12,787,413.00
Variance (Budget minus E$AC):	-446,108.00
Reason For Variance:	After this month's updates, our projected deficit for the total five-year project decreased slightly ($446,108 from last month's $448,906). We will continue to monitor production rates and costs and update the projections accordingly. In addition, we continue work on an analysis of the areas in our budget where spending is more than anticipated. When completed, this information will be shared with the PIs.

Projections
Jul 31, 2021

Dollars Projected For Month:	266,764.00
Actual Dollars Used:	243,359.00
Variance (Projected minus Actual):	23,405.00
Reason For Variance:	Variance mostly due to how projections for respondent payments hit our accounts.

Measures

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

Other Measures

Project Name	(VCT) Video Communication Technologies in Survey Data Collection

Project Mode   Primary: Mixed   Total of Modes: 3

Project Type   Sponsored Projects

Project Status   Current

Budget   *Direct Budget:* 241,958.00   *InDirect Budget:* 135,497.00   *Total Budget:* 377,455.00

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

Funding Agency   National Science Foundation
IRB   *HUM#:* HUM00159711   *Period Of Approval:* Exempt
Project Team
Project Lead: Andrew L Hupp
Budget Analyst: Dean E Stevens
Production Manager: Pooja Varma-Laughlin
Senior Project Advisor: Nicole G Kirgis
Production Manager:
Production Manager:

Proposal #:   no data

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

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

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

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

Other Project Team Members:
Kallan Larsen - PSM MS Student
Ai Rene Ong - PSM PhD Student
Tianheao Wang - PSM MS Student
Kevin Jensen (TSG) - portal/Blaise programming
Shanti Suresh, Matt Hanger, & Laura Yoder (TSG) - data management
Kyle Goodman - MSMS set-up programming
Jim Rodgers - MSMS consultation
Brady West - Research Associate Professor, Survey Research Center

Other Project Names: Video Communication Technologies

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

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

Risk Level   *On Track*

Monthly Update

The team continues to meet regularly to discuss analyses Kallan is doing and working on publications.

We are waiting for the first findings paper from to be reviewed at POQ.

The interviewer effects paper was resubmitted to JSSAM after addressing reviewer comments. The survey data sets will be made publicly available via openICPSR. This group has experience with this on a previous study. Work on the repositories begun in May. The repositories will not be completed until the time closer to publication (when the DOI is needed).

Four presentations were given at ESRA. A presentation on prerecorded interviews has been submitted to ESRA. Andrew and Fred worked on the no-cost time extension related to the unspent NSF funds. It will be submitted in August.

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

Andrew met with Dean to update cost projections. Overall we are projecting to be about right on target.

Andrew and Kallan finalized the outstanding cases in MSMS. Laura needs to do a final MSMS data set.

Kallan is going to be helping with MSMS rule writing in the coming months. Her projections have been moved to the first of the year.

Special Issues

Cost
Aug 09, 2021

Total Cost to Date (Direct + Indirect):	362,043.54
Estimated Cost at Completion (E$AC):	375,981.15
Total Budget:	377,455.00
Variance (Budget minus E$AC):	1,020.85

Reason For Variance:	VM costs are on target. 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: $29,994.33
Estimated cost at completion: $29,994.33
Variance: $94.67

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
Aug 09, 2021**

Dollars Projected For Month:	1,659.88
Actual Dollars Used:	1,401.17
Variance (Projected minus Actual):	258.71
Reason For Variance:	Project manager charged a few less hours than projected.

Measures

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

Other Measures

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

Project Status   Current

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

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

Funding Agency Cambridgeshire and Peterborough NHS Foundation Trust

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

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

Proposal #:   no data

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

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

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

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

Report Period	July, 2021 (WMH-Qatar)	**Project Phase**	Implementing

Risk Level   *On Track*

Monthly Update   The SRC team contined to review the code for all QC indicator flags to ensure they are correct.

Special Issues   None

Cost
Aug 17, 2021

Total Cost to Date (Direct + Indirect):	69,137.61
Estimated Cost at Completion (E$AC):	71,993.07
Total Budget:	74,928.00
Variance (Budget minus E$AC):	2,934.93
Reason For Variance:	Saving dollars for unexpected support during production

Projections
Aug 17, 2021

Dollars Projected For Month:	562.44
Actual Dollars Used:	918.71
Variance (Projected minus Actual):	-356.27
Reason For Variance:	minor variance in hours, will rebalance

Measures

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

Other Measures

Survey Research Operations

Monthly Project Report

Development Initiative and No Data Collection Projects

July 2021

Developmental Initiatives

TSME21-Day in the Life Videos
TSME 22-Blaise 5 Testing
TSME21-DCO Tech System Support
TSME21-QC-Systems
TSME21-RCLS
Self-Scheduling Interface for MSMS
SME22 - ST international

NonArchived Development Initiative and No-DataCol Projects

Project	Type	Status	Project Lead	Jan	Feb	Mar	Apr	May	Jun	Jul
Day in the Life Videos	Initiatives	Current	Vivienne Y Outlaw	🟡	🟡	🟡	🟡	🟡	🟡	🟡
TSME 22-Blaise 5 Testing (423562)	Initiatives	Current	Gina-Qian Yang Cheung	🟢	🟢	🟢	🟢	🟢	🟢	🟢
TSME R-PAY SYSTEM RE-WRITE(483257)	Initiatives	Current	Jeffrey L Smith	☐	🟢	☐	🟢	☐	☐	☐
TSME SRO SYS MAINTENANCE-GENERAL (483910)	Initiatives	Current	Jeffrey L Smith	🟢	🟢	☐	🟢	☐	☐	☐
TSME21-DCO Tech System Support	Initiatives	Current	Vivienne Y Outlaw	🟢	🟢	🟢	🟢	🟢	🟢	🟢
TSME21-QC-Systems (483249)	Initiatives	Current	Sarah Elisa Broumand	🟢	🟢	🟢	🟢	🟢	🟢	🟢
TSME21-RCLS (425196)	Initiatives	Current	Jim Rodgers	🟢	🟢	🟢	🟢	🟢	🟢	🟢
TSME21-SelfSchedUI (483424)	Initiatives	Current	Andrew L Hupp	🟡	🟡	🟢	🟢	🟢	🟢	🟢
TSME22-ST international (483227)	Initiatives	Current	Gina-Qian Yang Cheung	🟢	🟢	🟢	🟢	🟢	🟢	🟢

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

Principal Investigator/Client

Funding Agency

IRB	*HUM#:*	*Period Of Approval:*
Project Team	*Project Lead:*	Vivienne Y Outlaw
	Budget Analyst:	Carl S Remmert
	Production Manager:	
	Senior Project Advisor:	
	Production Manager:	
	Production Manager:	

Proposal #: no data

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

SRO Project Period 07/2020 - 06/2021

Data Col Period

Security Plan NA

Milestone Dates

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

Other Project Team Members:	Russ Stark
	Barb Homburg
Other Project Names:	
Sample Mgmt Sys	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

- -

Report Period	July, 2021 (Day in the Life Videos)	**Project Phase**	Implementing
Risk Level	*Some Concerns*		

Monthly Update no activity - waiting on return to campus and the ability to film safely

Special Issues

Cost		
Aug 11, 2021	*Total Cost to Date (Direct + Indirect):*	8,597.06
	Estimated Cost at Completion (E$AC):	8,597.06
	Total Budget:	18,000.00
	Variance (Budget minus E$AC):	9,402.94
	Reason For Variance:	no activity due to the pandemic

Projections
Aug 11, 2021

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	no activity due to the pandemic

Measures

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

Other Measures

Project Name	(TSME 22-Blaise 5 Testing (423562)) TSME 22-Blaise 5 Testing (423562)
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

Project Status Current

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

Principal Investigator/Client

Funding Agency

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

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

Proposal #: no data

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

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

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

Other Project Team Members:
Other Project Names:

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

Report Period	July, 2021 (TSME 22-Blaise 5 Testing (	**Project Phase**	Initiation
Risk Level	*On Track*		
Monthly Update	Nothing happened		

Special Issues

Cost
Aug 11, 2021

Total Cost to Date (Direct + Indirect):	29,085.05
Estimated Cost at Completion (E$AC):	29,085.05
Total Budget:	30,000.00
Variance (Budget minus E$AC):	914.95
Reason For Variance:	NA

Projections
Aug 11, 2021

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

Measures

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

Other Measures

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

**Principal
Investigator/Client**

Funding Agency

IRB	*HUM#:*	*Period Of Approval:*
Project Team	*Project Lead:*	Vivienne Y Outlaw
	Budget Analyst:	Carl S Remmert
	Production Manager:	Hueichun Peng
	Senior Project Advisor:	Gregg Peterson
	Production Manager:	
	Production Manager:	

Proposal #:	no data
Description:	This includes all the support and development work for a suite of tech systems DCO uses, including Fred, Recruitment Website, Iwer Web Site, etc.

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

Milestone Dates

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

**Other Project
Team Members:**

**Other Project
Names:**

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

- -

Report Period	July, 2021 (TSME21-DCO Tech System **Project Phase** Initiation
Risk Level	*On Track*
Monthly Update	1. Hueichun, Vivienne and Joe discussed the e-file upload module and the technical part. Joe confirmed the feasibility of this new upload module.

2. Joe and Hueichun spec out some revisions for file upload function in Fred for added security protocol. Hueichun will implement the new feature with the new e-file module.

3. Joe informed us that Fred needs to migrate from WebProj web server to SROCFWeb server in the next year. Hueichun has started to move Fred testing site to the new server for preliminary testing. Hueichun will work with Vivienne to spec out details of this migration in 2022.

4. Vivienne and Hueichun discussed the roll-out of using Display_name (downloaded from UM) to replace the old variable Preferred_Name in Fred. Gregg and Vivienne informed other system programmers for the change if it impacts the workflow.

5. Vivienne worked with Shaowei to spec out the change in DCSR FtF interview Scheduling piece to accommodate remote meeting protocol. Vivienne provided additional email templates for Shaowei to work on.

6. Hueichun added the Covid-related instruction to all the OnStaffer recruiting projects in DCSR.

Special Issues

Cost
Aug 13, 2021

Total Cost to Date (Direct + Indirect):	0.00
Estimated Cost at Completion (E$AC):	0.00
Total Budget:	25,000.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	additional programming activity needed to support DCO Systems

Projections
Aug 13, 2021

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	additional programming activity needed to support DCO Systems

Measures

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

Other Measures

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

Project Status Current

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

Proposal #:   no data

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

SRO Project Period   07/2020 - 06/2021

Data Col Period

Security Plan   NA

Milestone Dates

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

Other Project Team Members:

Other Project Names:

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

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

Risk Level   *On Track*

Monthly Update   The programmer worked on upgrading sorftware that hadn't been updated in several years. Projecgt Manager spent additional times on prepareing materials for FY22 developing plan, and supporting the cell phone verification project.

Special Issues   none

Cost
Aug 17, 2021

Total Cost to Date (Direct + Indirect):	30,168.58
Estimated Cost at Completion (E$AC):	30,168.58
Total Budget:	30,000.00
Variance (Budget minus E$AC):	-168.58
Reason For Variance:	Worked on numerous unexpected changes to Olive.

Projections
Aug 17, 2021

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	Team had to make up work that hadn't been performed.

Measures

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

Other Measures

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

Project Status Current

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

Principal Investigator/Client

Funding Agency

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

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

Proposal #: no data

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

SRO Project Period 07/2020 - 06/2021

Data Col Period

Security Plan NA

Milestone Dates

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

Other Project Team Members:

Other Project Names: Respondent Lookup

Sample Mgmt Sys SurveyTrak; SMS; Web SMS; MSMS

Data Col Tool NA

Hardware Other (MSMS and SuveyTrak servers)

DE Software NA

QC Recording Tool NA

Incentive Not used

  Administration N/A

  Payment Type N/A

  Payment Method N/A

- -

Report Period	July, 2021 (TSME21-RCLS (425196))

Project Phase   Implementing

Risk Level *On Track*

Monthly Update No new work this month.

Special Issues

Cost

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

Projections

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-SelfSchedUI (483424)) Self-Scheduling Interface for MSMS
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives **Project Status** Current
Budget	*Direct Budget:* 30,000.00 *InDirect Budget:* 0.00 *Total Budget:* 30,000.00
Principal Investigator/Client	
Funding Agency	
IRB	*HUM#:* *Period Of Approval:*
Project Team	*Project Lead:* Andrew L Hupp
	Budget Analyst: Megan Gomez-Mesquita
	Production Manager:
	Senior Project Advisor:
	Production Manager:
	Production Manager:
Proposal #:	no data

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

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

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

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

Other Project Team Members:

James Rodgers - Tech Lead
Holly Ackerman - Developer (MSMS API and other appointment related work)
Peter Sparks - Developer (R facing page)
Dave Padot - Development consultation

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

Other Project Names:

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

Report Period	July, 2021 (TSME21-SelfSchedUI (483⸱	**Project Phase**	Implementing

Risk Level — *On Track*

Monthly Update — Time in July was devoted to figuring out a few lingering issues related to timeouts and a few Spanish related items. Andrew tested and everything passed.

An updated version was pushed to production on 2021-07-29.

Special Issues

Cost
Aug 09, 2021

Total Cost to Date (Direct + Indirect):	32,297.92
Estimated Cost at Completion (E$AC):	32,297.92
Total Budget:	30,000.00
Variance (Budget minus E$AC):	-2,297.92
Reason For Variance:	Spanish work and fixing bugs.

Projections
Aug 09, 2021

Dollars Projected For Month:	0.00
Actual Dollars Used:	758.55
Variance (Projected minus Actual):	-758.55
Reason For Variance:	Spent ~10 hours fixing Spanish issues.

Measures

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

Other Measures

Project Name	(TSME22-ST international (483227)) TSME22 - ST international
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

Project Status Current

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

Principal Investigator/Client

Funding Agency

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

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

               Budget Analyst: Janelle P Cramer

               Production Manager:

               Senior Project Advisor:

               Production Manager:

               Production Manager:

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

SRO Project Period   07/2020 - 06/2021

Data Col Period

Security Plan   NA

Milestone Dates

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

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

Report Period	July, 2021 (TSME22-ST international (4 **Project Phase** Implementing
Risk Level	On Track
Monthly Update	Minor updates with ST and Sync program
Special Issues	

Cost
Aug 11, 2021

Total Cost to Date (Direct + Indirect):	31,099.93
Estimated Cost at Completion (E$AC):	31,099.93
Total Budget:	40,000.00
Variance (Budget minus E$AC):	8,900.07
Reason For Variance:	no issues

Projections
Aug 11, 2021

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

Measures

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

Other Measures