

Survey Research Operations

Monthly Project Report

Sponsored

June 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)*
 (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) *HRS 2021 Off-Year Mail Study / COVID Survey*
 (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
<i>ACL6</i>	Sponsored	Current	Terri Ann Ridenour	●	●	●	●	●	●
<i>ACL-LIFE</i>	Sponsored	Current	Terri Ann Ridenour	●	●	●	●	●	●
<i>AFHS</i>	Sponsored	Current	Rebecca Gatward	●	●	●	●	●	●
<i>ALS Controls</i>	Sponsored	Current	Rebecca Loomis	□	●	●	●	●	●
<i>BFY</i>	Sponsored	Current	Piotr Dworak	●	●	●	●	●	●
<i>C.A.R.E.</i>	Sponsored	Current	Donnalee Ann Grey-Farquharson	●	●	●	●	●	●
<i>CBII</i>	Sponsored	Current	Maureen Joan O'Brien	●	●	●	●	●	●
<i>CDS-19</i>	Sponsored	Current	Rachel Anne Orłowski	●	●	●	●	●	●
<i>DAWN CS</i>	Sponsored	Current	Juan Carlos Donoso	●	●	●	●	□	□
<i>ECHO</i>	Sponsored	Current	Terri Ann Ridenour	●	●	●	●	●	●
<i>EDC-Semi Structured</i>	Sponsored	Current	Karin Schneider	●	●	●	●	●	●
<i>H&WB</i>	Sponsored	Current	Juan Carlos Donoso	●	●	●	●	□	●
<i>HCAP 2020</i>	Sponsored	Current	Maureen Joan O'Brien	●	●	●	●	●	●
<i>HCDC, H&C</i>	Sponsored	Current	Barbara Lohr Ward	●	●	●	●	●	●
<i>HRS 2020</i>	Sponsored	Current	Evanthia Leissou	●	●	●	●	●	●
<i>HRS 2020 ABT</i>	Sponsored	Current	Evanthia Leissou	●	●	●	●	●	●
<i>HRS 2021 OYMS / COVID Survey</i>	Sponsored	Current	Ian Ogden	□	●	●	●	●	●
<i>MARS 2</i>	Sponsored	Current	Margaret Lee Hudson	●	●	●	●	●	●
<i>MTF base year 2017-2022</i>	Sponsored	Current	Rebecca Gatward	●	●	●	●	●	●
<i>MTF NR 2021</i>	Sponsored	Current	Lloyd Fate Hemingway	□	□	□	□	●	●
<i>MTF Panel (main data collection) 2021</i>	Sponsored	Current	Donnalee Ann Grey-Farquharson	●	●	●	●	●	●
<i>PSID21</i>	Sponsored	Current	Shonda R Kruger-Ndiaye	●	●	●	●	●	●
<i>SCA 2021</i>	Sponsored	Current	Theresa Camelo	●	●	●	●	●	●
<i>STARRS-LS Waves 3 & 4</i>	Sponsored	Current	Meredith A House	●	●	●	●	●	●
<i>VCT</i>	Sponsored	Current	Andrew L Hupp	●	●	●	●	●	●
<i>WMH-Qatar</i>	Sponsored	Current	Sarah Elisa Broumand	●	●	●	●	●	●

Project Name	(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 End:

Staffing Completed:

SS Train Start: 04/02/2019

DC Start: 04/23/2019

Pretest Start:

Recruitment Start: 02/25/2019

GIT Start: 04/01/2019

SS Train End: 04/03/2019

DC End: 09/14/2019

Other Project
Team Members:

Shonda Kruger-Ndiaye: SPA
 Terri Ridenour: SRO Lead/Project Manager
 Jaime Koopman: SSI (Blaise/STrak Specs)
 Gary Hein: SSI (Weblog Specs)
 Debra Heier: SSA (Project Coordination)
 Becky Scherr: SSA (Project Coordination)
 Grace Tison: Financial Analyst
 Lisa Carn: Production Manager
 Russ Stark: SSL STrak systems consultant and lab management
 Jeff Smith: Technical Lead
 Stephanie Windisch (and Chris Greene): Data Managers
 Jeff Smith: SurveyTrak Programmer
 Ashwin Dey: WebTrak, Weblog Programmer
 Dave Dybicki: CAI Programmer-Blaise
 Andrea Pierce: Help Desk

Other Project

Names: "Racial inequalities in health throughout adulthood: The cumulative impact of neighborhood chemical and non-chemical stressors on epigenomic pathways" (aka, "Social epigenomics of racial health inequalities - SERHI")
Sample Mgmt Sys SurveyTrak
Data Col Tool Blaise 4.8
Hardware Desktop
DE Software NA
QC Recording Tool NA
Incentive Yes, R
Administration SRO Group
Payment Type Check, prepaid (\$30 (interview)); Other (Check, prepaid - \$50 (consent to WBD/making home appointment))
Payment Method NA

Report Period	June, 2021 (ACL6)	Project Phase	Implementing
Risk Level	Some Concerns		
Monthly Update	ACL6 (reboot) data collection has resumed. Right now we have 26 eligible sample lines and 4 completed interviews.		
	Please see this folder for latest Proposal Docs that were submitted: L:\projects\ACL6\02 Budget\Proposal Docs\Reboot Ballpark Estimate		
Special Issues	I'm not entirely sure how to reflect the cost report figures for this ACL6 (Reboot) effort. There is no established budget.		

Cost
Jul 13, 2021

Total Cost to Date (Direct + Indirect): 781,765.40
Estimated Cost at Completion (E\$AC): 786,755.81
Total Budget: 772,591.00
Variance (Budget minus E\$AC): -14,164.81
Reason For Variance: Please see Monthly Updates.

Projections
Jul 13, 2021

Dollars Projected For Month: 2,393.51
Actual Dollars Used: 3,336.47
Variance (Projected minus Actual): -942.96
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 incentive 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:	733	54%	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 End:

Staffing Completed:

SS Train Start: 02/15/2021

DC Start: 02/22/2021

Pretest Start:

Recruitment Start:

GIT Start:

SS Train End:

DC End: 08/23/2021

Other Project

Team Members:

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

TBD: Production Assistant

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

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

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

Andrea Pierce: Help Desk

Other Project**Names:****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

June, 2021 (ACL-LIFE)

Project Phase

Implementing

Risk Level*Attention!***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 lwers, 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: lwers (~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% targeted).

Special Issues

Cost

Jul 13, 2021

Total Cost to Date (Direct + Indirect):	553,655.15
Estimated Cost at Completion (E\$AC):	733,115.70
Total Budget:	812,193.00
Variance (Budget minus E\$AC):	79,077.30
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\ACLife Cost Needs Spreadsheet 6-15-21.xlsx

Projections

Jul 13, 2021

Dollars Projected For Month:	121,759.29
Actual Dollars Used:	54,707.95
Variance (Projected minus Actual):	-67,176.40

Reason For Variance:

The Interviewer hours projected are much higher than actuals this month. As 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
Data Col Period
Security Plan
Milestone Dates

01/2019 - 03/2022
05/2020 - 01/2022
NA

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

Pretest Start:
Recruitment Start:
GIT Start:
SS Train End:
DC End: 01/31/2022

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

SRO Team: Leah Roberts, Andrew Hupp, Laura Yoder, Rose Zdybel, Pooja Varma-Laughlin, Jim Rodgers, Colette Keyser, Deb Wilson, Wen Chang
During the budget proposal stage this project was known as 'A More Efficient Web-Based Approach to Collecting National Family, Fertility and Reproductive Health Data'.
MSMS
Blaise 5; SAQ
Desktop
Other (Blaise 5 (for Mail questionnaires)); External vendor (TBD)
N/A
Yes, R
SRO Group
Check, post (Modules 1 - \$20, Module 2 - \$20 and Module 3 - \$30); Cash, prepaid (Screener IW - \$2 Potentially
Check through STrak RPay System; Check through other system (Info. from MSMS and transfer information via

Report Period

June, 2021 (AFHS)

Project Phase

Implementing

Risk Level

On Track

Monthly Update

June update
- We concluded the field period for Replicate 1 on 17 June.
- DMSS and PDMG worked to ensure all cases had a final outcome (or status in MSMS).
- Worked with DataForce on Replicate 2 planning and finalising print/mail numbers.
- SRO continued to work on updates to technical systems for Replicate 2.
- I will report final response rates in the July update but provisional numbers are ...
Sampled address n=19381,
completed screeners = 2556 (14%),
eligible cases = 1513 (59% eligibility rate),
Response rate to main IW 66% (998).

Special Issues

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

Cost
Jul 16, 2021

Total Cost to Date (Direct + Indirect): 1,441,251.96
Estimated Cost at Completion (E\$AC): 2,452,385.55
Total Budget: 2,490,133.00
Variance (Budget minus E\$AC): 37,747.45
Reason For Variance:

The estimated cost at completion has been decreased since last month. DataForce (printing, mailing, scanning vendor) provided a newcost based on
Any underspend will be used by the end of the project.

Projections
Jul 16, 2021

Dollars Projected For Month: 144,628.38
Actual Dollars Used: 24,439.29
Variance (Projected minus Actual): 120,189.09
Reason For Variance:

The variance is mostly due to a large invoice from DataForce being paid later than expected (July rather than June).

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

Other Measures

Project Name	(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	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="padding: 5px;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>			PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:				
Other Project Team Members:	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	June, 2021 (ALS Controls)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	<p>June 2021: The second batch of the expanded monthly mailing size (834 pieces) went out this month. Preparation work on the reminder letter mailings was initiated. These letters will be sent to all addresses that were mailed an invitation letter from Oct 2020 to May 2021, minus addresses for completed interviews and returned letters (2,399 out of 2,502 lines). These will be prepared in two batches to be mailed out during the month of July. Raphael Nishimura is preparing sample from the PI requested Ann Arbor area zip codes to be added to the base 834 piece monthly mailing, also starting in July.</p>		
Special Issues			

Cost
Jul 13, 2021

Total Cost to Date (Direct + Indirect): 39,577.02
Estimated Cost at Completion (E\$AC): 210,705.17
Total Budget: 255,139.51
Variance (Budget minus E\$AC): 44,434.34
Reason For Variance: The variance is holding at this rate and will continue to decrease due to increased sizes of the monthly invitation mailings and the addition of monthly reminder mailings.

Projections
Jul 13, 2021

Dollars Projected For Month: 11,698.55
Actual Dollars Used: 4,158.97
Variance (Projected minus Actual): 7,539.58
Reason For Variance: Projected additional mailings to be processed by PrintCopyMail did not come through this month. The underrun will be rolled forward to July.

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:	<p>University of Michigan Survey Research Center (U-M SRC) is contracted to recruit and interview participants for Baby's First Years -- a longitudinal randomized control trial study.</p> <p>The study's full name, listed on sub-contract documents, is Household Income and Child Development in Early Years. The study will draw on a convenience sample of mothers and their newborns in four US metropolitan areas: New York City; Omaha/Lincoln; New Orleans; and Minneapolis. One or two hospitals, listed in this application, will be used as recruiting sites in each area. The study uses a randomized control trial design in which low-income mothers and newborns will be randomly assigned to a treatment group that receives an unconditional income enhancement -- cash payments of \$333 per month—an amount roughly comparable to a variety of income assistance policies in the U.S. and shown to be associated with meaningful improvements for poor children in prior studies—or to a control condition that receives \$20 per month. In both groups, the payments will be made for the first 40 months of the child's life. To understand the impacts of added income on children's development, researchers will assess treatment/control group differences at ages 1, 2 and 3 on measures of cognitive, language, memory, self-regulation and socio-emotional development. Recruitment is scheduled to start in April of 2018, and each follow-up interview will be conducted 12 months later -- close in time to the child's 1st, 2nd, and 3rd birthday. The feasibility of the approach has been established in a one-year pilot conducted in 2014 at the New York Presbyterian Hospital/Columbia University Medical Center.</p> <p>The Principal Investigators are Dr. Greg Duncan from University of California Irvine (UCI), Dr. Kimberly Noble from Teacher's College Columbia University (TCCU), and Katherine Magnuson from University of Wisconsin-Madison (UWM). UCI (Dr. Duncan) and TCCU (Dr. Noble) are the institutions and signatories funding the U-M SRC subcontract from various sources including the National Institute for Child Health and Human Development (NICHD) and private foundations listed in this application. The study research team also includes co-investigators Lisa Gennetian (New York University), and Hiro Yoshikawa (New York University).</p> <p>SRO will be responsible for four interactions with the selected mothers/infants:</p> <ul style="list-style-type: none"> • 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. <p>Each data collection phase/wave will be a full 12 months, with Baseline starting in April 2018:</p> <p>Recruitment/Baseline: 04/01/2018 - 03/31/2019 Wave 1: 04/01/2019 - 03/31/2020 Wave 2: 04/01/2020 - 03/31/2021 Wave 3: 04/01/2021 - 03/31/2022</p>			
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 End:
Staffing Completed: 02/07/2018
SS Train Start: 03/20/2018
DC Start: 05/07/2018

Pretest Start:
Recruitment Start: 01/01/2018
GIT Start: 03/19/2018
SS Train End: 03/22/2018
DC End: 06/30/2022

Other Project**Team Members:**

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

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

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

Report Period

June, 2021 (BFY)

Project Phase

Implementing

Risk Level

On Track

Monthly Update

Project updates:

BFY Age 2 data collection ended with 924 interviews (compared to 931 in Age 1). We have re-contacted 35 respondents (did not participate in Age 1) setting high expectations for Age 3. Age 3 training has been completed 7/13 - 7/15 and Age 3 data collection will start Monday 7/17. 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 are also hiring bilingual interviewers in NE to make sure we can effectively work on locating Latinx Rs.

Data collection / Sample:

Final Age 2 results by site:

	Goal	Actual	+/-
--	------	--------	-----

Overall	883	924	41
Nebraska	258	267	9
New York	261	270	9
Minnesota	106	113	7
Louisiana	258	274	16

Staffing:

Age 3 Staffing:

14 iwers in total

NE: 1

MN: 2

NY: 6 OS

NOLA: 3

Locators: 2"

Technical system:

BFY needed to sprint to production. Age 3 MSMS was set up and tested in 3 weeks due to conflicting demands of other projects for MSMS design and programming. Interviewers helped with Age 3 MSMS testing and gave very positive feedback to some of the new features (QR codes for texting, etc.). Since Age 3 MSMS is utilizing some of the new features we are looking forward to the interviewers' feedback after the first few weeks of production.

Finances:

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

Special Issues

Cost

Jul 13, 2021

Total Cost to Date (Direct + Indirect): 5,383,830.10

Estimated Cost at Completion (E\$AC): 6,831,849.39

Total Budget: 6,427,695.73

Variance (Budget minus E\$AC): -404,153.66

Reason For Variance: The PI approved overrun is \$435 and since March we are continuing to stay under the agreed level and increasing savings.

Projections

Jul 13, 2021

Dollars Projected For Month: 122,904.35

Actual Dollars Used: 110,663.98

Variance (Projected minus Actual): 12,240.37

Reason For Variance: Age 2 and Age 3 overlap in June and July so some projections may not be accurate (iwer time spent on production vs. training, R payments requested to start new wave, etc.)

Measures

	Units Complete	RR	HPI
Current Goal:	878	89%	7.0
Goal at Completion:	931	93%	7.0
Current actual:	0	90%	5.4
Estimate at Complete:	931	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:	<p>This budget assumes an overall SRO involvement period of 24 months commencing in January 2019 with data collection taking place during a 20-month period, beginning April 2019. The total cost for this work is estimated at \$1,034,833 (\$821,295 direct, \$213,538 indirect), budgeted at the NCAA's published indirect cost recovery rate of 26%.</p> <p>SRO will provide consultation, respondent location activities and data collection for the NCAA-DoD Grand Alliance (Cumulative and persistent effects of concussion and repetitive head impact exposure: An intermediate follow-up study of US Military Service Academy members and NCAA student-athletes in the CARE Consortium) project. Specifically, SRO will provide consultation on respondent locating and panel maintenance procedures and instruments, locate and contact respondents by mail and phone to prompt them to access the online data collection questionnaire, and conduct telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.</p> <p>The estimate assumes that approximately 7,500 (approximately 5,000 in the first year and 2,500 in the second year of the project) respondents are included in the initial outreach/email request to complete the online instrument by your research team, and that approximately 20% comply. The remaining 6,000 respondents will be followed up by SRO with locating, further contacts and prompting to complete the web survey. Finally, we anticipate direct outreach by telephone interviewers with access to the online application. All respondent incentives will be paid by the research staff.</p>					
SRO Project Period	12/2018 - 08/2021					
Data Col Period	02/2019 - 06/2021					
Security Plan	NA					
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="width: 50%; vertical-align: top;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>				PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:					
Other Project Team Members:	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	June, 2021 (C.A.R.E.)	Project Phase	Implementing
Risk Level	<i>On Track</i>		
Monthly Update	<p>Project Management:</p> <ul style="list-style-type: none"> - The data collection extension will be in June 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. <p>Data Manager:</p> <ul style="list-style-type: none"> - 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 <p>Questionnaire:</p> <ul style="list-style-type: none"> - N/A <p>System</p> <ul style="list-style-type: none"> - continue to develop spec and Monitor & troubleshooting for system - Developing CSMS specification for next wave data collection. <p>Data Collection:</p> <ul style="list-style-type: none"> - Received Final Release#11 (2423 cases) - Continue to monitor the progress(e.g. goals and results for specific targets/criteria of sample groups) in the final month - Preparing for close-out -- final coding activities for TLs. - Debriefing with Interviewers <p>Production Stats as of 06/30/2021:</p> <p>Overall RR: 33.8%</p> <p>Total Released Cases: 11990</p> <p>Total Complete IW: 3734</p> <p>Total Complete WEB IWs = 3521; CATI Comp IWs= 214</p>		

Special Issues

Cost			
Jun 30, 2021	Total Cost to Date (Direct + Indirect):	1,385,893.52	
	Estimated Cost at Completion (E\$AC):	1,496,433.66	
	Total Budget:	1,537,084.42	
	Variance (Budget minus E\$AC):	40,650.76	
	Reason For Variance:	1.Projection will be adjusted to reflect the full work scope for the data collection extension. 2. Reduced interviewers HPI due to wrapping up end of data collection activities.	

Projections
Jun 30, 2021

Dollars Projected For Month:

61,039.59

Actual Dollars Used:

48,096.42

Variance (Projected minus Actual):

12,943.17

Reason For Variance:

Field hours are a less than projected due to losing one interviewer and wrapping up end of 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	Upcoming																					
Budget	Direct Budget:	305,282.00	Indirect Budget:	109,901.56	Total Budget: 415,183.56																				
Principal Investigator/Client	David Weir																								
Funding Agency																									
IRB	HUM#:		Period Of Approval:																						
Project Team	Project Lead:	Deborah Zivan																							
	Budget Analyst:	Richard Warren Krause																							
	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	<table><tr><td>PreProduction Start:</td><td>06/01/2021</td><td>Pretest Start:</td><td></td></tr><tr><td>Pretest End:</td><td></td><td>Recruitment Start:</td><td></td></tr><tr><td>Staffing Completed:</td><td></td><td>GIT Start:</td><td></td></tr><tr><td>SS Train Start:</td><td></td><td>SS Train End:</td><td></td></tr><tr><td>DC Start:</td><td></td><td>DC End:</td><td>04/30/2022</td></tr></table>					PreProduction Start:	06/01/2021	Pretest Start:		Pretest End:		Recruitment Start:		Staffing Completed:		GIT Start:		SS Train Start:		SS Train End:		DC Start:		DC End:	04/30/2022
PreProduction Start:	06/01/2021	Pretest Start:																							
Pretest End:		Recruitment Start:																							
Staffing Completed:		GIT Start:																							
SS Train Start:		SS Train End:																							
DC Start:		DC End:	04/30/2022																						
Other Project Team Members:	Data Manager: Programmer: Project Assistant: Becky Scherr																								
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 other system (Submit excel file to business office)																								

Report Period	June, 2021 (CAMS 2021)	Project Phase	Planning
Risk Level	On Track		
Monthly Update	During June the team worked on comparing options for printing and fulfillment of mail project. The budget and projections were finalized after a decision was made to use DataForce for printing and fulfillment. DataForce will not be scanning the booklets. Study staff had a kick off meeting with project staff to review timeline and discuss process improvements based on previous implementations of the CAMS survey. Project staff worked with study staff on revising the brochure that accompanies the SAQs.		
Special Issues	Unlike previous years, a decision was made to use DataForce for printing and fulfillment. PIs requested additional time to deliver questionnaire revisions.		

Cost
Jul 14, 2021

<i>Total Cost to Date (Direct + Indirect):</i>	3,194.35
<i>Estimated Cost at Completion (E\$AC):</i>	0.00
<i>Total Budget:</i>	415,183.56
<i>Variance (Budget minus E\$AC):</i>	0.00
<i>Reason For Variance:</i>	

Projections
Jul 14, 2021

<i>Dollars Projected For Month:</i>	3,500.69
<i>Actual Dollars Used:</i>	3,194.35
<i>Variance (Projected minus Actual):</i>	306.34
<i>Reason For Variance:</i>	Fewer Survey Director hours were used than projected.

Measures			
	Units Complete	RR	HPI
<i>Current Goal:</i>	5256	66.4%	
<i>Goal at Completion:</i>			
<i>Current actual:</i>			
<i>Estimate at Complete:</i>			
<i>Variance:</i>			

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					
IRB	HUM#: 00173324	Period Of Approval:	10/2020-10/2021		
Project Team	Project Lead: Maureen Joan O'Brien Budget Analyst: Carl S Remmert Production Manager: Lisa J Carn Senior Project Advisor: Nicole G Kirgis Production Manager: James Koopman Production Manager:				
Proposal #:	no data				
Description:	TBD				
SRO Project Period	10/2020 - 10/2021				
Data Col Period	01/2021 - 06/2021				
Security Plan	NA				
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> PreProduction Start: 10/15/2020 Pretest End: Staffing Completed: 12/15/2020 SS Train Start: 02/18/2021 DC Start: </td> <td style="padding: 5px;"> Pretest Start: Recruitment Start: 11/15/2020 GIT Start: SS Train End: 02/18/2021 DC End: </td> </tr> </table>			PreProduction Start: 10/15/2020 Pretest End: Staffing Completed: 12/15/2020 SS Train Start: 02/18/2021 DC Start:	Pretest Start: Recruitment Start: 11/15/2020 GIT Start: SS Train End: 02/18/2021 DC End:
PreProduction Start: 10/15/2020 Pretest End: Staffing Completed: 12/15/2020 SS Train Start: 02/18/2021 DC Start:	Pretest Start: Recruitment Start: 11/15/2020 GIT Start: SS Train End: 02/18/2021 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	June, 2021 (CBII)	Project Phase	Implementing
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Risk Level	Some Concerns
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Monthly Update	<p>There are approximately 7 days of data collection left with 259 interviews needed to reach the goal of 3,000 completed interviews. There are currently 2,743 completed interviews, including 31 partials containing data. All non-complete lines have been attempted in reminder calling. 525 surveys have been completed after having been contacted by reminder callers. More lower effort is being put into manual locating for all locations. This is partly responsible for the slowing completion rate, as manual locating sample lines are less productive than reminder calling lines. The PI's are aware of this and are in favor of the effort placed on locating as this will help to mitigate any possible sample bias. Another contributor to lower yield is the emphasis that has been placed on subgroups throughout reminder calling and manual locating. For the better part of 4 weeks, all reminder calling effort was placed on GA and CUNY, lower responding sample that was prioritized and ultimately produced less interviews. PI's have placed value on sample balance over yield. Sample is well-worked at this point in data collection.</p>
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Occupation/industry coding continues, with 2,536 cases final coded and 2,290 checked. The incentive was increased last month from \$30 to \$50 for a completed interview. An email went out to all remaining active sample announcing this. The fifth email reminder was sent on 7/9. No more emails will go out. Text messaging reminders continue at this point for all sample whose voicemail identifies them and have not yet completed (n=~550). We have added two additional locators for the last month of data collection. Weighting discussions are underway and strategies are expected to be finalized within the next couple of weeks. 'Some concerns' selected below is checked due to larger underrun due to lower yield.

Special Issues

See above under Cost* 'reason for variance'.

Cost

Jul 16, 2021

Total Cost to Date (Direct + Indirect): 473,243.87

Estimated Cost at Completion (E\$AC): 632,304.21

Total Budget: 643,762.00

Variance (Budget minus E\$AC): 11,457.79

Reason For Variance:

Most notable, less money spent on incentives due to lower yield than anticipated. Less coding hours due to lower yield. Some other non-salary costs overbudgeted (duplicating, postage, software licensing)

Projections

Jul 16, 2021

Dollars Projected For Month: 78,989.45

Actual Dollars Used: 66,108.91

Variance (Projected minus Actual): 12,880.54

Reason For Variance:

Some non-salary costs were overbudgeted and have not used. Some staff did not charge hours so we have pushed them forward. Not all lower June hours have hit yet.

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:	3000	20%	
Current actual:	2,743	18.3	
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 Orłowski
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) (P\$

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

Risk Level On Track

Monthly Update Occupation/industry coding work finished on June 8.

Reconciliation between received respondent components (i.e., saliva samples, linkage forms, time diaries, consents) and the logging database was on-going. Due to limited in-office staff during pandemic, the majority of this work was pushed until the end of the project.

Special Issues

Cost
Jun 30, 2021

Total Cost to Date (Direct + Indirect): 8,983,519.64
Estimated Cost at Completion (E\$AC): 8,987,059.86
Total Budget: 8,965,959.00
Variance (Budget minus E\$AC): -21,100.86
Reason For Variance: DMSS survival analysis and dataset preparation were not part of original project scope.

Projections
Jun 30, 2021

Dollars Projected For Month: 8,034.00
Actual Dollars Used: 5,502.11
Variance (Projected minus Actual): 2,531.89
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
<p><i>Current Goal:</i></p> <p><i>Goal at Completion:</i></p> <p><i>Current actual:</i></p> <p><i>Estimate at Complete:</i></p> <p><i>Variance:</i></p>			

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:	<p>The goal of ECHO is to understand pressing childhood health concerns such as autism spectrum disorders, low birth weight and childhood obesity. The project will collect survey data and a series of bio-specimens in order to assess the effects of persistent organic pollutants and heavy metals, maternal nutritional or weight status in pregnancy, and pregnancy infection and inflammation on the health of children.</p> <p>The study includes two sample cohorts: a cohort from previous, ongoing data collection efforts as well as new sample. This existing sample cohort includes mothers and children recruited in 2011 or later for the Archive for Research in Child Health (ARCH) study in the Lansing area. The newly recruited sample cohort, MARCH (Michigan Archive for Research in Child Health), will consist of 1,100 pregnant women: 1) a statewide probability sample of 1,000 women from 20 prenatal clinics affiliated with 10 hospitals located in Ann Arbor, Dearborn, Detroit, Grand Rapids, Novi, Saginaw, Port Huron and Traverse City, and 2) 100 women from one clinic in Flint.</p> <p>SRO's work scope is divided into two phases. During Phase 1, SRO provided assistance with prenatal questionnaire development and designed technical systems for MARCH cohort recruitment conducted by Michigan State University-employed (and other hospital-employed) interviewers and affiliated project staff. During Phase 2, SRO developed systems and is conducting data collection for MARCH sample 3-month. The MARCH age 4-5 follow up interviews and home visits are also in SRO's work scope. All other follow up protocols with the MARCH sample will be administered via REDCap by the MSU team (e.g. at 9-month, age 2 and age 3).</p> <p>For the MARCH sample, expectant mothers are recruited during their initial prenatal visit to a healthcare provider. During a follow up phone call, respondents are asked to complete an interview about nutrition, levels of physical activity, use of healthcare services, physical and mental health, prescription medications and other substance use. In addition, women are asked to give blood samples in the first and second trimesters and urine samples in all three trimesters.</p> <p>The sample recruitment and administration of prenatal interviews is conducted by MSU-employed (and other hospital-employed) interviewers using SRO's technical systems and laptops. SRO programmed all questionnaires administered during recruitment, the sample management system(s), and the system to keep track of the collection and storage of blood and urine samples. When babies are born, the research team obtains hospital birth records for the mother and child and a placenta sample. The first MARCH babies were born in early 2018.</p> <p>SRO's data collection activities start after the MARCH babies are born. The first interview with the mother is done when the baby is 3-6 months old. Mothers are interviewed again by MSU when the children are 9-12 months old, and yearly after that until the child is 4 years old. When the children are 3 months old, mothers are asked to provide a child fecal sample and toenail clippings, and at age 4 they will provide shed teeth. Children from the MARCH cohort will be assessed using standardized developmental assessments at 4-5 years old. The assessments will be done during in-home visits.</p>				
SRO Project Period	01/2017 - 08/2023				
Data Col Period	05/2018 - 03/2023				
Security Plan	NA				

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

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

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

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

Report Period

June, 2021 (ECHO)

Project Phase

Implementing

Risk Level*Attention!***Monthly Update**

[Phase 1: Recruitment and Prenatal Surveys]

Recruitment in 7 prenatal clinics is active and picking up pace. There have been 114 women recruited since 8/18/20 and 97 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, 958 women have been recruited in clinics. Among those cases, 789 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.

[Phase 2: 3-Month Data Collection Summary]

Babies born: 713
 3-month sample released: 707
 3-month interviews completed: 504
 3-month biospecimen collected: 309
 Average attempts / lw: 7.6

lw length: 55
Response Rate: 72%

[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 2021, 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

During our 7/12/21 PI check-in meeting, we learned that the ECHO PIs have revisited their in-person Safety Plan (COVID Protocols) and have decided that any MSU employee staffed on the project that is participant-facing needs to be vaccinated.

These instructions were communicated to the production manager, as they relate to the Age 4 in-person protocols (to begin early next year) and staffing considerations. My understanding is that SRO Admin / SRC will discuss this client expectation, share input and provide guidance for any follow up discussions needed.

ECHO Year 6 Update - REDCap (Email sent to SRO Admin on Tuesday, July 9, 2021)

Dear SRO Admin:

I am writing to inform you of the recent proposal that was submitted for ECHO's Year 6 scope of work that is expected to begin September 1, 2021. Specifically, I am following up on an item we discussed at our last Project Review, the use of REDCap Central for the administration of Age 4 protocols with the MARCH Cohort.

On May 12, Gregg, Marsha and I met with the MSU Study Manager, Alexa, and she provided an overview of the REDCap Central system and answered our questions. REDCap Central is currently used by MSU staff to administer surveys to ARCH Cohort participants. We also reviewed the test REDCap sandbox site and other resources provided by ECHO National.

Some advantages of using REDCap include:

- funding for Y6 and Y7 of longitudinal study;
- continued work with and commitment to our clients at SRC and MSU;
- cooperation with ECHO National consortium;
- adherence to NIH requirements;
- opportunity to learn about REDCap, and incorporate it into our portfolio;
- ability to harness innovation;
- and appeal to other prospective clients.

However, REDCap also poses associated risks such as:

- stretching our organizational capacity;
- veering away from our standard systems and business model;
- limiting our QC efforts;
- inability to program / change REDCap questionnaires;
- and limiting our control over reporting and overall data management.

At this time, Gregg, Marsha and I agree that it is feasible for SRO to use REDCap for the distribution of ECHO Age 4 surveys, which are primarily self-administered via Web or paper questionnaires. However, it's critical that we give everyone an opportunity to voice any questions or concerns before we proceed. Please let us know if we should meet to discuss further.

Confirmation was sent in regard to Stephanie's question: Our involvement in Year 6 is dependent on our adoption of REDCap...correct? Yes, SRO's involvement and funding is dependent on our adoption of REDCap.

Cost
Jul 13, 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:

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

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 Y6 proposal budget, which includes additional Age 4 (in-person protocols) and will inevitably require an additional request to use carry forward funds.

Projections
Jul 13, 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	<table border="1" style="width: 100%;"> <tr> <td>PreProduction Start: 04/01/2020</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start: 04/01/2020</td> </tr> <tr> <td>Staffing Completed: 06/01/2020</td> <td>GIT Start:</td> </tr> <tr> <td>SS Train Start: 06/20/2020</td> <td>SS Train End: 07/05/2020</td> </tr> <tr> <td>DC Start: 08/01/2020</td> <td>DC End: 06/30/2021</td> </tr> </table>			PreProduction Start: 04/01/2020	Pretest Start:	Pretest End:	Recruitment Start: 04/01/2020	Staffing Completed: 06/01/2020	GIT Start:	SS Train Start: 06/20/2020	SS Train End: 07/05/2020	DC Start: 08/01/2020	DC End: 06/30/2021
PreProduction Start: 04/01/2020	Pretest Start:												
Pretest End:	Recruitment Start: 04/01/2020												
Staffing Completed: 06/01/2020	GIT Start:												
SS Train Start: 06/20/2020	SS Train End: 07/05/2020												
DC Start: 08/01/2020	DC End: 06/30/2021												
Other Project Team Members:	Karin Schneider, Barb Homburg, Becky Loomis, Kasyera Kowalczyk												
Other Project Names:													
Sample Mgmt Sys	SurveyTrak												
Data Col Tool	Blaise 4.8												
Hardware	Laptop												
DE Software	NA												
QC Recording Tool	NA												
Incentive	Yes, Other (By PI)												
Administration	SRO Group												
Payment Type	NA												
Payment Method	NA												

Report Period	June, 2021 (EDC-Semi Structured)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	Interviewing going well. HPI under projection. Last interviews will be first two weeks of July (handful). Projecting 95%rr.		
Special Issues	None.		
Cost			
Jul 13, 2021	Total Cost to Date (Direct + Indirect):	338,284.00	
	Estimated Cost at Completion (E\$AC):	369,574.00	
	Total Budget:	456,620.00	
	Variance (Budget minus E\$AC):	87,046.00	

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
Jul 13, 2021**

Dollars Projected For Month:

27,800.00

Actual Dollars Used:

24,800.00

Variance (Projected minus Actual):

3,000.00

Reason For Variance:

Production mgr hours lower than projected for June.

Measures

	Units Complete	RR	HPI
Current Goal:	129	.95	4
Goal at Completion:	129		
Current actual:	123	.93	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	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start: 05/01/2019</td> <td style="padding: 5px;">Pretest Start: 11/12/2019</td> </tr> <tr> <td style="padding: 5px;">Pretest End: 12/13/2019</td> <td style="padding: 5px;">Recruitment Start: 08/15/2019</td> </tr> <tr> <td style="padding: 5px;">Staffing Completed: 03/01/2021</td> <td style="padding: 5px;">GIT Start:</td> </tr> <tr> <td style="padding: 5px;">SS Train Start:</td> <td style="padding: 5px;">SS Train End:</td> </tr> <tr> <td style="padding: 5px;">DC Start: 04/01/2021</td> <td style="padding: 5px;">DC End: 11/30/2021</td> </tr> </table>				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
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:	Taghreed 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	June, 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:

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

3.- COVID Bank hours:

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

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

Cost
Apr 30, 2021

Total Cost to Date (Direct + Indirect):	997,099.00
Estimated Cost at Completion (E\$AC):	2,369,850.00
Total Budget:	2,317,801.68
Variance (Budget minus E\$AC):	-82,048.00
Reason For Variance:	

The projected overrun increased because of 2022 salary increases and recharges.

Projections
Apr 30, 2021

Dollars Projected For Month:	0.00
Actual Dollars Used:	113.00
Variance (Projected minus Actual):	-113.00
Reason For Variance:	

Telephone charges. JC will follow up with Parina.

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

Other Measures

Project Name (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 *HUM#:* HUM00099822 *Period Of Approval:*

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

Proposal #: no data

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

SRO Project Period 01/2020 - 12/2021

Data Col Period 07/2020 - 08/2021

Security Plan NA

Milestone Dates

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

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

Other Project Names:

Sample Mgmt Sys SurveyTrak

Data Col Tool Blaise 4.8

Hardware Laptop; [UM cell] Phone

DE Software NA

QC Recording Tool NA

Incentive Yes, R; Yes, INF

Administration NA

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

Payment Method Check through STrak RPay System

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

Risk Level Some Concerns

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 is almost 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 at the end of July to discuss any questions Ireland has, and possible SRO involvement needed for their Iwer trainings.

Special Issues

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

Cost

Jul 13, 2021

Total Cost to Date (Direct + Indirect): 182,659.58

Estimated Cost at Completion (E\$AC): 4,220,812.48

Total Budget: 4,488,000.00

Variance (Budget minus E\$AC): 267,187.52

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

Jul 13, 2021

Dollars Projected For Month: 722.16

Actual Dollars Used: 0.00

Variance (Projected minus Actual): 722.16

Reason For Variance: Projected hours were low, but HCAP hours worked were charged to HCAP R24 acct for Ireland work.

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:	<p>Low-income parents face serious constraints when they seek housing, and these constraints may undermine their childrens' development. In many cases, low-income parents will face tradeoffs between dwelling unit quality, neighborhood quality, and school quality. This project has four main aims: (1) to learn how parents negotiate these tradeoffs and make choices about where to live; (2) to assess how features of the child's social contexts--home, neighborhood, and school-- combine to influence key cognitive socio-emotional and health outcomes among parents and their children; (3) to examine how the quality of housing affects parenting practices and outcomes for children and their caregivers; and (4) to enhance the study of child development through theoretical and methodological advances in the study of housing and the other social contexts related to housing.</p> <p>The project proposes to conduct two waves of data collection, separated by about 12 months, with families in Seattle, Dallas and Cleveland. In-person interviews will be completed with ~ 1686 parents and 2328 children aged 3-10 (at Wave 1). One-half of the sample will be an experimental sample consisting of applicants for a federal housing voucher. This experiment sample will include both voucher winners (treatment group) and voucher losers (control group). The other half of the sample will be generated through a random selection and screening process in census blocks that vary by household income weighted toward lower-income blocks. Each interview with an adult will last about 90 minutes, and will include the collection of anthropometric measures from all sample persons (including children), administration of Woodcock-Johnson tests to children. Adult Voucher sample participants will be asked for three blood pressure measurements, and blood spots will be collected from Voucher sample adults and children. The data collection also includes collecting laser tape measurement of all rooms in a household, 8 block face neighborhood observations, a four-day leave-behind child time diary, and post-interview observations.</p>					
SRO Project Period	04/2016 - 02/2020					
Data Col Period	05/2017 - 09/2018					
Security Plan	NA					
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> PreProduction Start: 09/01/2018 Pretest End: Staffing Completed: 03/01/2020 SS Train Start: 08/18/2020 DC Start: 08/24/2020 </td> <td style="width: 50%; vertical-align: top;"> Pretest Start: Recruitment Start: 09/01/2019 GIT Start: SS Train End: 08/21/2020 DC End: 02/06/2021 </td> </tr> </table>				PreProduction Start: 09/01/2018 Pretest End: Staffing Completed: 03/01/2020 SS Train Start: 08/18/2020 DC Start: 08/24/2020	Pretest Start: Recruitment Start: 09/01/2019 GIT Start: SS Train End: 08/21/2020 DC End: 02/06/2021
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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	June, 2021 (HCDC, H&C)	Project Phase	Closing
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Risk Level	<i>On Track</i>
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Monthly Update	<p>Task 1: Management, Budget and Work Plan</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> • Reviewed/monitored project expenses. Revised and adjusted monthly projections. • Monitored subcontracts, project invoicing and payments. Followed up on unpaid invoices. • Finalized final project review presentation for SRO (a required internal presentation). Delivered presentation. • Prepared and delivered final production report for the Social Security form data collection. • Managed production activities necessary to support Social Security form data collection: <ul style="list-style-type: none"> o Logged and scanned incoming Social Security forms. <input type="checkbox"/> Uploaded scanned forms to SFTP o Managed respondent payments <input type="checkbox"/> Mailed respondent incentives; reconciled cash/gift card funds. • Final Deliverables (see Final Data Deliverables for more detail) o Finalized and delivered Wave 2 data collection report o Inserted participant address updates into sample management system o Adjusted questionnaire timing files o Began preparing clean copies of Wave 1 and Wave 2 questionnaire specifications for archiving. o Assembled copies of all respondent communications, brochures, etc. for archive. o Began preparation of addendum to Final Report at PI's request <p>Task 2: Sampling</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> • Responded to client questions about delivered data • Prepared analysis of child age <p>Task 3: Questionnaire Development</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> • No activity this month <p>Task 4: CAI Programming</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> • No activity this month <p>Task 5: Systems Programming</p> <p>% Task Spent to date</p> <ul style="list-style-type: none"> • Archived data collection reports; reconciled sample lines in the management system <p>Tasks 6, 7: Interviewer Recruitment & Hiring, Training</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> • No activity this month <p>Task 8: Main Data Collection</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> • Managed respondent payments o Mailed tokens of appreciation for returned SSN forms o Reconciled shipped gift cards and closed funds as necessary
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- SSN/Records-matching mailings
- o Reviewed incoming social security forms to identify those in need of remediation. Mailed forms for correction along with notated checklist. Logged tracking numbers
- Prepared supplies for shipment to offsite storage
- Reconciled final interviewer timesheets and expenses
- Closed out interviewer assignments

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

- Recompiled Wave 1 STATA files and delivered to SFTP
- Updated documentation for child date-of-birth anomalies
- Finalized and delivered respondent addresses
- Archived data sets off the production server into the archive database
- See Task 1 Management for other activities

Special Issues

Areas of Concern (changes shown in italics):

Wave 2

- Delivery of non-PII data to ICPSR will be delayed until August 2021. Data delivery for HCHD was requested by the NICHD program officer.
- 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 \$55,000 and \$80,000 in direct costs. The exact figure depends on the response rate to our social security form data collection effort, and the level of effort necessary to support that data collection. The underrun results from staffing changes at SRO brought about by the pandemic, the revised verification effort, as well as interviewer efficiency during production interviewing. There are some unknowns, such as the response rate for the administrative records forms and the level of support required for respondents for completion of the records forms. SRO will continue to update the research team on financial status.

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
Jul 16, 2021

Total Cost to Date (Direct + Indirect): 11,916,013.70
Estimated Cost at Completion (E\$AC): 11,948,576.52
Total Budget: 12,043,058.00
Variance (Budget minus E\$AC): 94,481.48
Reason For Variance: The PI authorized additional funding to cover an extension of data collection and panel maintenance post-data collection. Work scope changes, including moving to telephone for Wave 2 has led to the projected underrun. The PI may authorize additional panel maintenance activities that will utilize some of the underrun.

Projections
Jul 16, 2021

Dollars Projected For Month: 63,017.43
Actual Dollars Used: 51,975.93
Variance (Projected minus Actual): 11,041.50
Reason For Variance: Projected indirect costs of roughly seven thousand dollars were not realized. Non-salary over-projections, including respondent incentives and an expected invoice from Dataforce, did not hit June financials, together account for the remainder of the underrun.

Measures

	Units Complete	RR	HPI
Current Goal:	1041 PCG iws	75% of located cases	8.5
Goal at Completion:	1041 PCG iws	75% of located cases	8.5
Current actual:	1413	79%	9.0
Estimate at Complete:	1413	79%	9
Variance:	372	4%	.5

Other Measures

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

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:	<p>The HRS 2020 COVID Antibody Study is a supplement to the HRS to accurately assess who has been exposed and infected with SARS-CoV-2. Antibody testing for the novel coronavirus that causes COVID-19 will provide an indication of the characteristics of people who were infected in this national sample. It is important to understand how the relative size of these groups differs by race/ethnicity, socioeconomic status, work status, education and geography in order to add to our understanding of who was infected with the coronavirus, as well as those who went on to have symptoms and develop COVID-19 during the pandemic progression. Saliva collection kits will be mailed to approximately 17,600 respondents homes. The consent document will detail the purpose of the study and what is being requested of them. The consent includes two questions - if the respondent ever received a positive COVID test result and the date of that test. The collection will be administered in both English and Spanish. The sample will consist of all HRS 2020 sample members who do not reside in a nursing home. The field period, mailings and reminder calling, is expected to occur between October 15, 2020 and March 31, 2021 before a vaccine is widely available. We expect 65% of the sample to consent to this collection. This project is being conducted in collaboration with the ISR Biospecimen lab.</p>														
SRO Project Period	09/2020 - 09/2021														
Data Col Period	10/2020 - 03/2021														
Security Plan	NA														
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start: 09/01/2020</td> <td style="padding: 5px;">Pretest Start: 10/09/2020</td> </tr> <tr> <td style="padding: 5px;">Pretest End: 10/15/2020</td> <td style="padding: 5px;">Recruitment Start: 09/22/2020</td> </tr> <tr> <td style="padding: 5px;">Staffing Completed: 01/15/2021</td> <td style="padding: 5px;">GIT Start:</td> </tr> <tr> <td style="padding: 5px;">SS Train Start: 01/25/2021</td> <td style="padding: 5px;">SS Train End:</td> </tr> <tr> <td style="padding: 5px;">DC Start: 10/19/2020</td> <td style="padding: 5px;">DC End: 03/31/2021</td> </tr> </table>					PreProduction Start: 09/01/2020	Pretest Start: 10/09/2020	Pretest End: 10/15/2020	Recruitment Start: 09/22/2020	Staffing Completed: 01/15/2021	GIT Start:	SS Train Start: 01/25/2021	SS Train End:	DC Start: 10/19/2020	DC End: 03/31/2021
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Staffing Completed: 01/15/2021	GIT Start:														
SS Train Start: 01/25/2021	SS Train End:														
DC Start: 10/19/2020	DC End: 03/31/2021														
Other Project Team Members:	Andrew Hupp, Debbie Zivan Dan Tomlin, Tony Romanowski, Daniah Buageila, Anna Fuqua-Smith, Janet McBride, Jim Rodgers, Laura Yoder, Holly Ackerman, Pam Swanson, Deb Wilson, David Bolt, Matt Hanger, Tricia Blanchard, Lloyd Hemingway, Dianne Casey, Gary Hein.														
Other Project Names:	HRS Antibody, Antibody Project														
Sample Mgmt Sys	MSMS														
Data Col Tool	Other (COVID Antibody Saliva Kit, Paper/Pencil)														
Hardware	Laptop; Desktop; [UM cell] Phone; Paper and Pencil														
DE Software	Other (MSMS)														
QC Recording Tool	N/A														
Incentive	Yes, R														
Administration	SRO Group														
Payment Type	Check, prepaid (\$20)														
Payment Method	Check through STRak RPay System														

Report Period	June, 2021 (HRS 2020 ABT)	Project Phase	Implementing
Risk Level	Some Concerns		

Monthly Update

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

Minnesota delivered results for all but 22 respondents as of the end of June. 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 7/13/21 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: 7,121 (44%)

Refusals: 1,801 (11%)

Deceased: 112 (1%)

Received Vaccine: 420 (2%)

Undeliverable - No Forwarding Address: 111 (1%)

Pending response: 6,723 (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

Jul 13, 2021

Total Cost to Date (Direct + Indirect): 902,150.69

Estimated Cost at Completion (E\$AC): 769,609.08

Total Budget: 817,809.00

Variance (Budget minus E\$AC): 48,199.92

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 pre-reflected 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 - as this decision was just made, CRS has not yet been updated.

Projections

Jul 13, 2021

Dollars Projected For Month: 7,413.24

Actual Dollars Used: 3,743.67

Variance (Projected minus Actual): 3,669.57

Reason For Variance:

The variance is due primarily to Rpay and postage. Projections have been pushed forward.

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:	10,587	65%	
Current actual:	7,114	44%	
Estimate at Complete:	7,114	44%	
Variance:	3,473	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

<i>PreProduction Start:</i> 01/01/2019	<i>Pretest Start:</i> 11/11/2019
<i>Pretest End:</i> 11/23/2019	<i>Recruitment Start:</i> 09/01/2019
<i>Staffing Completed:</i> 12/15/2019	<i>GIT Start:</i> 02/17/2020
<i>SS Train Start:</i> 02/19/2020	<i>SS Train End:</i> 02/26/2020
<i>DC Start:</i> 03/02/2020	<i>DC End:</i> 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 June, 2021 (HRS 2020) **Project Phase** Closing

Risk Level Some Concerns

Monthly Update Date collection began March 2nd. A couple weeks into March, in person data collection was halted due to COVID19 restrictions. All preferred mode TEL sample was released to the field and all preferred mode FTF sample was approved for phone interviews. Fifty percent of the preferred mode FTFs were approved for phone interviews with release mid June with the remainder released at the end of September. 3,849 web lines had been released as of August with the non-response follow-up being conducted by field interviewers in SurveyTrak. Limited effort protocol

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

The team continued to focus on coding, SAQ/SSA mailings, 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 Jul 13, 2021

Total Cost to Date (Direct + Indirect):	15,634,529.11
Estimated Cost at Completion (E\$AC):	15,773,768.20
Total Budget:	16,267,431.00
Variance (Budget minus E\$AC):	493,662.80
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 FTF cases approved for mode change to TEL, stopping interviewer SSA linkage consent, stopping WBD protocol, changing SAQ and SSA to be administered via mail with a phone follow-up, and COVID hours charged to date. Costs for transcription of one COVID question, SAQ and SSA mail protocol, and CASIC rate change have been added.

Projections Jul 13, 2021

Dollars Projected For Month:	191,593.12
Actual Dollars Used:	153,584.05
Variance (Projected minus Actual):	38,009.07
Reason For Variance:	Actual hours for June were 3% higher than projections (10% higher in dollars). It seems that our Fringe Benefits, due to staff hours and ACA, were the reason for the dollars being higher than projected even though hours were much closer. With that said, postage was \$2,700 under projections and Rpay was \$16,212 under projections (the Business Office voided \$27K worth of checks a month earlier than anticipated). 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) 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:	543,278.00	Indirect Budget:	195,580.00 Total Budget: 738,858.00										
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:	<p>This project refers to what will be the first of up to three HRS mail studies planned for the 2020-2022 off-year. Following the model of past off-year mail studies, a subsample of 14,000 HRS respondents will be sent a paper booklet, as well as a prepaid incentive by check, and will be asked to complete the paper survey and mail back to Ann Arbor via prepaid return materials. Logging of paper booklets will take place in Ann Arbor, where booklets will be packaged and shipped to an external vendor, DataForce, for scanning and data-export. This study will follow a Dillman-like reminder sequence - initial mailing, followed by up to three reminder mailings (booklet #2, postcard, booklet #3).</p> <p>An external vendor, DataForce, will handle (1) formatting, printing and mailing of the booklet (in English and Spanish); (2) sending reminder mailings to each batch of sample; and (3) scanning completed booklets and delivering data to SRO for processing and delivery.</p> <p>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.</p>													
SRO Project Period	03/2021 - 12/2021													
Data Col Period	05/2021 - 12/2021													
Security Plan	NA													
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start: 03/01/2021</td> <td style="padding: 5px;">Pretest Start:</td> </tr> <tr> <td style="padding: 5px;">Pretest End:</td> <td style="padding: 5px;">Recruitment Start:</td> </tr> <tr> <td style="padding: 5px;">Staffing Completed:</td> <td style="padding: 5px;">GIT Start:</td> </tr> <tr> <td style="padding: 5px;">SS Train Start: 06/08/2021</td> <td style="padding: 5px;">SS Train End: 06/08/2021</td> </tr> <tr> <td style="padding: 5px;">DC Start: 05/28/2021</td> <td style="padding: 5px;">DC End: 12/31/2021</td> </tr> </table>				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
PreProduction Start: 03/01/2021	Pretest Start:													
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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 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: Debra Heier Project Assistant 3 (RPay Only): Anna Fuqua-Smith													

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

Report Period	June, 2021 (HRS 2021 OYMS / COVID)	Project Phase	Implementing
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Risk Level	<i>On Track</i>
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Monthly Update	<p>[Budget Updated - Not Mentioned in 05/02021 MPR Entry]</p> <p>On 5/24/2021 and per a recommendation from Rick K. with signoff from Nicole K. and Eva L., the OYMS 2021 budget was updated in CRS to match the prevailing estimated cost-to-complete (\$738,858 --> \$884,040). This was done to update the budget prepared in 2017 to match the realities of the OYMS / Spring COVID survey implementation in 2021 (increased sample size, changes in material/postage costs, etc.).</p> <p>----</p>
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[Production - Intake & Logging]

June was a significant month for logging with over 5,500 SAQs logged by a team of 7 Survey Techs. The fast-track logging process in use is quite successful, though continues to require sensitive handling / care when preparing batch-uploads into MSMS.

It was discovered that approximately 800 cases were assigned non-unique tracking numbers by USPS during materials-preparation. These numbers track return-activity from the initial mailing and activity is grounds for exclusion from subsequent mailings. Those cases assigned a duplicate tracking number and inappropriately excluded from a reminder mailing will be included in a small, supplemental reminder mailing in July. We/DataForce are now aware of the possibility of this error by the USPS upon POUR tracking-number assignment and will QC for non-unique tracking-numbers assigned.

Weekly intake of new booklets has dropped off significantly as of the weeks of 7/4 and 7/11.

[Production Data-Out]

Production SAQ processing began in late-June with the first delivery of production data in early-July. The data are of keen interest to the SRC-HRS team, as some of the COVID Survey data may drive preload in HRS 2022; options for expediting the data-out, if needed, are available.

[Technical Systems]

Mid-production development and testing were required in June, 2021. Further, many members of the team have had limited interaction with MSMS thus far and significant formal/informal training was needed. These factors resulted in some additional technical hours and PM Team workload.

Special Issues	<p>(1) Developing and implementing repeatable systems, protocols and procedures in supporting an HRS Mail Study data collection in MSMS;</p> <p>(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) potential utility of package-tracking on returns from initial mailing).</p>
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Cost	
Jun 30, 2021	<p>Total Cost to Date (Direct + Indirect): 722,471.37</p> <p>Estimated Cost at Completion (E\$AC): 718,317.64</p> <p>Total Budget: 738,858.00</p> <p>Variance (Budget minus E\$AC): 165,722.70</p>

Reason For Variance:

[06/2021 Updates] Significant variance due to balance of Services-of-Others (DataForce) projections being pushed forward to July, rather than being spread out over coming months.

As of 7/16/2021, remaining costs have been pushed forward and distributed evenly across several months toward reducing the variance by month.

Projections
Jun 30, 2021

Dollars Projected For Month:

249,226.58

Actual Dollars Used:

71,526.71

Variance (Projected minus Actual):

177,699.87

Reason For Variance:

Many direct costs roughly tracked projections; key "actual" variances - fewer contingent staff hours were needed than expected, and more full-time staff hours were required (technical development, management); non-salary costs were quite a bit lower than projected.

Key drivers of variance in June, 2021: (1) Services-of-Others charges being \$123,000 below the projection; and (2) Indirect costs coming in at ~\$47,000 below the projection for the month (due to Services-of-Others shortfall). Both of these will be addressed going forward by spreading the anticipated-remaining Serv.-of-Oth. costs across the remaining months of data collection.

Measures

	Units Complete	RR	HPI
Current Goal:	11,200	80.0%	N/A
Goal at Completion:			
Current actual:	6,492	46.9%	
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:	<p>The Social Wellbeing Research Centre (SWRC) at the University of Malaya is conducting the second wave of data collection for the MARS study, including questionnaire revision, questionnaire translation into Mandarin and Malay, and instrument technical redesign in order to incorporate Wave 1 preload information. In this effort, SWRC will revisit n=5,613 respondents from the first wave, as well as 1,000 additional households from which they will select up to three eligible respondents. The first wave of MARS included up to three randomly-selected members from each household aged 40 and older. The average interview length is expected to be 70 minutes. Data collection will be conducted in English, Malay, and Mandarin.</p>				
SRO Project Period	01/2020 - 09/2021				
Data Col Period	09/2020 - 08/2021				
Security Plan	NA				
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="text-align: center; vertical-align: top;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>			PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:				
Other Project Team Members:	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 June, 2021 (MARS 2) **Project Phase** Implementing

Risk Level *Some Concerns*

Monthly Update Data collection was very slow in the month of June due to a month-long country-wide lockdown to stem the spread of COVID cases in Malaysia, which is seeing the highest number of cases so far in the entire pandemic, even as vaccine rollout (which started later than in the US) continues in the country. Minimal cases were attempted and completed, nearly all via telephone due to the very tight travel restrictions in the country. The SWRC and SRO teams have taken the opportunity to focus this slower time on data quality control reviews, using paradata and continuing verification on cases via telephone. The SWRC team has also been working on preparing to do additional data checks by comparing Wave 1 and Wave 2 data.

Special Issues In May we had reviewed together with the SWRC team the production goals needed to meet their completion goal this year. Together we laid out a plan to be able to complete data collection by the end of November, which would require 400 completed cases per month. Then COVID cases spiked and the country entered a month-long lockdown, stalling production. We have the budget to support continuing data collection into 2022, though will be losing a key SRO project manager (Jay Lin) in October. I have some concerns about being able to support the SWRC team adequately without Jay if data collection lasts into 2022.

Cost
Jul 13, 2021

Total Cost to Date (Direct + Indirect):	199,590.23
Estimated Cost at Completion (E\$AC):	242,199.46
Total Budget:	254,702.00
Variance (Budget minus E\$AC):	12,502.54
Reason For Variance:	Monies originally budgeted for international travel have been reallocated to support extended data collection due to slow production as a result of the pandemic. Projections have extended through November 2021.

Projections
Jul 13, 2021

Dollars Projected For Month:	7,410.18
Actual Dollars Used:	5,112.15
Variance (Projected minus Actual):	2,298.03
Reason For Variance:	Lower DM & HD hours needed than projected due to lower 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 End:

Staffing Completed:

SS Train Start:

DC Start:

Pretest Start:

Recruitment Start:

GIT Start:

SS Train End:

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 June, 2021 (MTF base year 2017-2022) **Project Phase** Implementing

Risk Level *On Track*

Monthly Update June updates

- The last school administration was completed on 11 June.
- Survey admins. were completed in 333 schools (total sample n=377) within these schools 32,548 students completed a survey (RR 72%), Hours per admin is 11.
- All Interviewers and Team Leaders are closed out.
- Peggy and I will begin working on preproduction tasks for BY2022 during the summer.

Special Issues

Cost		
Jul 13, 2021	Total Cost to Date (Direct + Indirect):	5,712,182.92
	Estimated Cost at Completion (E\$AC):	6,826,731.05
	Total Budget:	7,316,931.00
	Variance (Budget minus E\$AC):	490,199.95

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 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
Jul 13, 2021

Dollars Projected For Month: 62,100.91
Actual Dollars Used: 84,241.21
Variance (Projected minus Actual): -22,140.30
Reason For Variance:

The variance is due to more IWER hours being charged in June than projected. The projections against actuals for May + June are very close - however the split between months was not accurately projected.

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	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> PreProduction Start: 03/01/2021 Pretest End: Staffing Completed: 04/13/2021 SS Train Start: 05/19/2021 DC Start: 05/20/2021 </td> <td style="width: 50%; vertical-align: top;"> Pretest Start: Recruitment Start: 03/01/2021 GIT Start: SS Train End: 05/19/2021 DC End: 08/18/2021 </td> </tr> </table>				PreProduction Start: 03/01/2021 Pretest End: Staffing Completed: 04/13/2021 SS Train Start: 05/19/2021 DC Start: 05/20/2021	Pretest Start: Recruitment Start: 03/01/2021 GIT Start: SS Train End: 05/19/2021 DC End: 08/18/2021
PreProduction Start: 03/01/2021 Pretest End: Staffing Completed: 04/13/2021 SS Train Start: 05/19/2021 DC Start: 05/20/2021	Pretest Start: Recruitment Start: 03/01/2021 GIT Start: SS Train End: 05/19/2021 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	June, 2021 (MTF NR 2021)	Project Phase	Implementing
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Risk Level	On Track
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Monthly Update	All sample lines for calling were released by mid-June. The total sample was about 1,400 lines more than originally anticipated (14,990 instead of 13,500), because the project decided to search for phone number updates for respondents who had a consistent history of participation before being coded as lost during their past two waves. With the increased sample size, we began exploring the feasibility of extending calling by 12 days, through the end of August.
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Special Issues

None

Cost

Jun 30, 2021

Total Cost to Date (Direct + Indirect):	83,661.82
Estimated Cost at Completion (E\$AC):	324,361.71
Total Budget:	327,461.00
Variance (Budget minus E\$AC):	3,099.29
Reason For Variance:	Variance is less than 1%, so project appears to be right on track.

Projections

Jun 30, 2021

Dollars Projected For Month:	56,663.02
Actual Dollars Used:	58,230.36
Variance (Projected minus Actual):	-1,577.34
Reason For Variance:	The different pay dates between field and SSL interviewers was not accounted for. Projections have since been adjusted for field interviewers.

Measures

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

Other Measures

Finds per Hour--Current Goal=1.0, Current Actual=1.69
 Finalized cases per Hour--Current Goal=1.75, Current Actual=2.26
 Attempts per Hour--Current Goal=12.0, Current Actual=12.2

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:	<p>This project is a continuation of MTF Illume Web 2020. The new budget has been combined with previous to allow for "additional funding" of the continuing portion and includes some development/programming work for 2021.</p> <p>PI staff will edit and test 12 survey versions, all previously programmed in Illume by SRO. SRO will further test the surveys as part of the systems integration process. All 12 surveys will be launched in 2021. After testing is complete, SRO will launch the 2021 Web survey data collection with an estimated sample size of 20,000 cases identified by the Principal Investigator who will deliver the contact information including e-mail address to SRO. The Web survey data collection will replace aspects of the standard mail-based data collection. Both the separately funded Winter Location calling effort and Non-Response follow-up calling will include this sample – with the calling effort being integrated with the standard MTF activities.</p> <p>This budget assumes an overall SRO involvement period of 12 months commencing in January 2021 with the data collection taking place during a 7-month period, beginning April of 2021. The total cost for this work is estimated at \$355,783 (\$228,066 direct, \$127,717 indirect), budgeted at the currently negotiated on-campus recovery rate of 56%.</p>					
SRO Project Period	01/2021 - 12/2021					
Data Col Period	04/2021 - 10/2021					
Security Plan	NA					
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="width: 50%; text-align: center; vertical-align: top;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>				PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:					
Other Project Team Members:	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 June, 2021 (MTF Panel (main data collection)) **Project Phase** Implementing

Risk Level On Track

Monthly Update

1. Added Release 8 to the production
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 06/30/2021

Total Sample: 21589

Total completes: 7971

Response Rate: 36.92%

Special Issues

Cost

Jun 30, 2021

Total Cost to Date (Direct + Indirect):	945,336.38
Estimated Cost at Completion (E\$AC):	1,126,514.88
Total Budget:	1,135,001.00
Variance (Budget minus E\$AC):	8,486.12
Reason For Variance:	The amount of underrun will be adjusted in July.

Projections

Jun 30, 2021

Dollars Projected For Month:	36,897.60
Actual Dollars Used:	30,050.96
Variance (Projected minus Actual):	6,846.64
Reason For Variance:	The amount of underrun will be adjusted in July.

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:** 4,434,021.00 **Indirect Budget:** 2,483,047.00 **Total Budget:** 6,917,068.00

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 End: 10/25/2020

Staffing Completed: 12/02/2020

SS Train Start: 02/24/2021

DC Start: 03/18/2021

Pretest Start: 09/28/2020

Recruitment Start: 10/15/2020

GIT Start:

SS Train End: 03/05/2021

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	June, 2021 (PSID21)	Project Phase	Implementing
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Risk Level	<i>Some Concerns</i>
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Monthly Update	As of June 17, we invited the final group of Web sample lines to the survey. The Splitoff program testing is underway and we hope to provide our first production batch for review at the end of July and to release the first reviewed batch to production, mid-August.
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We are carefully monitoring production against goals and revising weekly. The PIs recently asked us to create a more pessimistic version of the goals just to see where we would land. They still insist we cannot extend beyond 12/31. The Web Special offer of an extra \$20 to complete the interview within ~ 2 weeks has led to increased web yield for each eligible release. The focus on iwer attempts remains, as attempts have been pretty consistently lower than requested. However, it's worth noting that we have technical issues which may be partly to blame. 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); emails and texts are sometimes not recorded in the system as contact attempts; 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; we are unable to transfer sample via MAP. The speed of the rules has improved notably. That's good.

In addition to the iwer-related issues, we are also facing a variety of data-related problems. A new one just recently identified is a subset of Web Rs whose active sessions do not expire properly and hang until intervention is taken. How to fix these properly is currently TBD. Rs cannot proceed with their interviews until resolution.

Special Issues

Cost	<p>Total Cost to Date (Direct + Indirect): 3,246,047.25</p> <p>Estimated Cost at Completion (E\$AC): 7,309,880.45</p> <p>Total Budget: 6,917,068.00</p> <p>Variance (Budget minus E\$AC): -392,812.45</p> <p>Reason For Variance: We currently project a direct cost overrun of -\$262,001.40, an increase of -\$10,724.79 over last month. This increase was mainly due increases in: management (SSA time was underestimated), printing projections (to accommodate the planned mailing protocol), as well as increased June ACA costs. ACA costs were particularly high last month on PSID - ~\$10K (double what we had projected). Because of the volatility of ACA costs, we plan to watch this for another month before potentially increasing projections.</p>
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Also subject to change: TSG projections, the human intervention required for the self-scheduler (still not working consistently), and printing and mailing costs (as the protocol is still developing).

Projections	<p>Dollars Projected For Month: 573,312.60</p> <p>Actual Dollars Used: 578,776.11</p> <p>Variance (Projected minus Actual): 5,463.51</p> <p>Reason For Variance: The June variance was minimal (~1%) mostly because June actuals were used to update projections at the very end of the month.</p>
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Measures

	Units Complete	RR	HPI
<i>Current Goal:</i>	4918		5.6
<i>Goal at Completion:</i>	9694	89%	7.5
<i>Current actual:</i>	4924	47.8%	5.7
<i>Estimate at Complete:</i>	9694	89%	7.5
<i>Variance:</i>	0	0	0

Other Measures

All Measures reported through the last completed week (through 7/10). Our goals will be reassessed each week, with variance in weekly performance leading to updates of future weeks.

Unlike typical CATI/CAPI study waves, our cumulative HPI is expected to fall as more Web sample is invited to the study and more Rs complete by Web.

The RR reported reflects only the sample invited as of 6/12. We haven't currently set goals of RR by week, only iws by week and HPI by week. We will focus more on RR once more of our sample is released.

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 Cam
Senior Project Advisor: Shonda R Kruger-Ndiaye
Production Manager:
Production Manager:

Proposal #: no data

Description: The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations.

The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 600 interviews.

SRO Project Period 12/2020 - 12/2021

Data Col Period 01/2021 - 12/2021

Security Plan NA

Milestone Dates

<i>PreProduction Start:</i>	<i>Pretest Start:</i>
<i>Pretest End:</i>	<i>Recruitment Start:</i>
<i>Staffing Completed:</i>	<i>GIT Start:</i>
<i>SS Train Start:</i>	<i>SS Train End:</i>
<i>DC Start:</i> 01/02/2021	<i>DC End:</i> 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 June, 2021 (SCA 2021) **Project Phase** Implementing

Risk Level On Track

Monthly Update SCA June 2021 began as scheduled on 5/26/2021, and ended as scheduled on 6/21/2021. We completed 608 IWs (324/182/102), eight IWs above our goal of 600 (320/180/100); at an overall hpi of 3.24 (.13 above our budgeted hpi of 3.0). More sample was bad than usual, requiring more sample to be released than usual, and as a result hpi was higher.

Special Issues**Cost**

Jul 13, 2021

Total Cost to Date (Direct + Indirect): 525,271.10
Estimated Cost at Completion (E\$AC): 1,119,140.49
Total Budget: 1,122,582.00
Variance (Budget minus E\$AC): 3,441.51
Reason For Variance: reduced hpi

Projections

Jul 13, 2021

Dollars Projected For Month: 89,690.73
Actual Dollars Used: 95,459.21
Variance (Projected minus Actual): -5,768.48
Reason For Variance: reduced hpi

Measures

	Units Complete	RR	HPI
<i>Current Goal:</i>	600		3.0
<i>Goal at Completion:</i>	600		3.0
<i>Current actual:</i>	608		3.24
<i>Estimate at Complete:</i>	608		3.24
<i>Variance:</i>	8		.24

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:	<p>This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.</p> <p>For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data.</p> <p>To date, we have completed 2 waves of STARRS-LS interviewing. During Wave 1, we attempted to contact 50,000 individuals and completed approximately 14,500 full interviews. All Wave 1 participants that completed a full Wave 1 interview were asked to participate in Wave 2. Waves 3 and 4, which are covered in this application, will include the full STARRS-LS Wave 2 sample, regardless of whether they completed the interview.</p> <p>In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys).</p>													
SRO Project Period	05/2020 - 04/2025													
Data Col Period	11/2020 - 10/2024													
Security Plan	Yes													
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start: 04/01/2020</td> <td style="padding: 5px;">Pretest Start:</td> </tr> <tr> <td style="padding: 5px;">Pretest End:</td> <td style="padding: 5px;">Recruitment Start: 07/23/2020</td> </tr> <tr> <td style="padding: 5px;">Staffing Completed: 10/01/2020</td> <td style="padding: 5px;">GIT Start:</td> </tr> <tr> <td style="padding: 5px;">SS Train Start: 11/18/2020</td> <td style="padding: 5px;">SS Train End: 11/24/2020</td> </tr> <tr> <td style="padding: 5px;">DC Start: 11/09/2020</td> <td style="padding: 5px;">DC End: 11/03/2022</td> </tr> </table>				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
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	June, 2021 (STARRS-LS Waves 3 & 4)	Project Phase	Implementing
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Risk Level	<i>On Track</i>
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Monthly Update	<ul style="list-style-type: none"> <input type="checkbox"/> We have released five replicates (5,174 sample lines) and completed 3,854 interviews as of July 6. <input type="checkbox"/> We continued bi-weekly meetings with the ODUSA to coordinate Safety Plan and respondent locating activities. <input type="checkbox"/> The Year 2 hardship account was approved to be used for 60 days while we await the Year 2 subaward. <input type="checkbox"/> Our financial analyst worked to determine which staff should charge the old and new accounts in June to come close to a zero balance on the Year 1 account. <input type="checkbox"/> HJF sent the Year 2 draft subaward agreement package to U-M ORSP at the end of the month. <input type="checkbox"/> 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. <input type="checkbox"/> Paul and Meredith met with USUHS and U-M IT to discuss U-M's plan to move from Box to Dropbox for file sharing; we determined Google Drive is a better option. <input type="checkbox"/> James and Meredith attended the June 15 GSC meeting. <input type="checkbox"/> IRB: <ul style="list-style-type: none"> <input type="checkbox"/> We received acknowledgement from the USUHS IRB for two Wave 3 ORIOS. <input type="checkbox"/> We awaited USUHS concurrence for the STARRS-LS Continuation protocol continuing review. <input type="checkbox"/> The U-M IRB asked James and Meredith to speak with U-M OGC and 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. We have a meeting scheduled for early July. <input type="checkbox"/> The Enclave team installed more R packages in the Windows and Linux environments. <input type="checkbox"/> Work continued on the annual NDI data file. <input type="checkbox"/> We continued work on biomarker group requests for assistance, completing a request for blood-draw date & survey-completion date data associated with a subset of the EWAS PPDS sample for the PGC. <input type="checkbox"/> We sent a description of the work and requested a budget estimate from ICPSR for adding biosample flags and RUIDs to the ICPSR holdings.
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Special Issues

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

□ Year 2 funding: Because the final Year 2 award has not yet been issued, this remains an area of risk. However, we made additional progress on this matter in June. The Year 2 hardship account was established and HJF sent the Year 2 draft subaward agreement package to U-M ORSP at the end of June.

□ 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 forms 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 6 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

Apr 30, 2021

Total Cost to Date (Direct + Indirect): 2,382,067.00

Estimated Cost at Completion (E\$AC): 13,258,296.00

Total Budget: 12,787,413.00

Variance (Budget minus E\$AC): -448,906.00

Reason For Variance:

. After this month's updates, our projected deficit for the total five-year project stayed about the same (\$448,906 from last month's \$449,819). 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

Apr 30, 2021

Dollars Projected For Month: 234,119.00

Actual Dollars Used: 211,653.00

Variance (Projected minus Actual): 22,466.00

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:				
Proposal #:	no data				
Description:	<p>This research project will examine data quality, participation, respondent experience, and costs in two promising but not yet widely deployed survey modes that use off-the-shelf video technology and are less costly than face to face (FTF) interviews: video-mediated (VM) interviews (live two-way communication via platforms like Skype) and video self-administered (VS) interviews, in which video-recorded interviewers ask the questions and respondents answer by typing or clicking. This project will compare these measures of data quality and costs in VM and VS interviews carried out by the same professional interviewers and in conventional online (textual) self-administered questionnaires, asking the same survey questions to members of a representative sample who are randomly assigned to one of these three modes. Because VM is synchronous and "live" like face-to-face (FTF) interviewing, and VS is asynchronous and recorded but still projects a human face, the project's comparisons will provide new insights regarding how these decomposable aspects of human contact affect behavior and experience in surveys. The project's results will reveal the extent to which, and for whom, less costly interaction (live but remote vs. recorded) with an interviewer promotes engagement and data quality comparable to what is found in similar FTF interviews. More generally, the findings will address when and in what ways modern communication modes that reduce social presence and are less personal might be equal to or even more effective than FTF interaction. Findings from this project will provide valuable information relevant to the future of survey measurement and will be of interest to survey researchers in the Federal statistical system and other survey organizations.</p> <p>Even as survey data continue to be central to public policy and decision-making, survey measurement is challenged by declining response rates, increasing costs, declining trust in survey organizations, and rapidly changing communication habits among the public. Understanding how video technologies could fit into the future of survey data collection is important both because it may meet potential respondents "where they live" and because it may provide a significantly lower cost alternative to FTF interviewing. There is even the potential to reach some members of the public whose location makes FTF interviewing difficult or expensive, but who may well be able to participate in a video interview (e.g., people who live in remote rural areas or members of the military deployed overseas). In comparing data quality across these three survey modes, the project will quantify participation rates, connectivity problems, respondent compliance with the video interviewing protocol, conscientious responding (giving precise answers to numerical questions, thoughtfully differentiating answers), and disclosure of sensitive information. The project will measure the potential impact of individual interviewers, feelings of engagement with the interview, rapport with the interviewer, and respondent satisfaction. The project also will allow assessment of data collection costs across these modes. Access to and use of video technologies are not universal, and even among those with access some are willing to engage in video interaction while others are reluctant. The project will begin to address whether and how the effects of video technologies on survey data collection differ for participants with different levels of prior experience and preference for using the technologies.</p>				
SRO Project Period	09/2018 - 06/2020				
Data Col Period	08/2019 - 11/2019				
Security Plan	NA				

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

Video Communication Technologies

Other Project**Names:****Sample Mgmt Sys**

MSMS

Data Col Tool

Blaise 5

Hardware

Desktop; Other (Webcam, USB headset)

DE Software

N/A

QC Recording Tool

N/A

Incentive

Yes, R

Administration

SRO Group; Other (CloudResearch (TurkPrime))

Payment Type

Cash, prepaid (\$2); Other (ABS=\$2 giftcode -> prepaid; \$20/\$22 giftcode -> post)

Payment Method

Imprest Cash Fund from ISR Business Office; Other (TurkPrime (now CloudResearch))

Report Period

June, 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 talks are in the process of being prepared ESRA that occurs every Friday in July.

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

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

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

Kallan is going to be helping with MSMS rule writing in the coming months. Her projections will be adjusted to move her VCT time to future months. Andrew will work with Rachel (her supervisor) on that.

Andrew and Fred will work on the no-cost time extension related to the unspent NSF funds.

Special Issues**Cost****Total Cost to Date (Direct + Indirect):** 359,857.71**Estimated Cost at Completion (E\$AC):** 375,680.79**Total Budget:** 377,455.00**Variance (Budget minus E\$AC):** 1,321.21

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

Dollars Projected For Month:

580.35

Actual Dollars Used:

0.00

Variance (Projected minus Actual):

580.35

Reason For Variance:

No time was charged to the main NSF account in June. Any costs went to the MiCDA account which needed to be used by the end of the fiscal year.

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	<table><tr><td>PreProduction Start:</td><td>Pretest Start:</td></tr><tr><td>Pretest End:</td><td>Recruitment Start:</td></tr><tr><td>Staffing Completed:</td><td>GIT Start:</td></tr><tr><td>SS Train Start:</td><td>SS Train End:</td></tr><tr><td>DC Start:</td><td>DC End:</td></tr></table>					PreProduction Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
PreProduction Start:	Pretest Start:														
Pretest End:	Recruitment Start:														
Staffing Completed:	GIT Start:														
SS Train Start:	SS Train End:														
DC Start:	DC End:														
Other Project Team Members:	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	June, 2021 (WMH-Qatar)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	The SRC team is assisting the SESRI QC team to identify and investigate cases with high multiple field visits and interviewers with low prevalence rates. The SRC team continued to review the code for all QC indicator flags to ensure they are correct.		

Special Issues

None

Cost

Jun 30, 2021

<i>Total Cost to Date (Direct + Indirect):</i>	68,218.90
<i>Estimated Cost at Completion (E\$AC):</i>	71,660.92
<i>Total Budget:</i>	74,928.00
<i>Variance (Budget minus E\$AC):</i>	3,267.08
<i>Reason For Variance:</i>	Saving dollars for unexpected support during production

Projections

Jun 30, 2021

<i>Dollars Projected For Month:</i>	1,933.74
<i>Actual Dollars Used:</i>	2,193.34
<i>Variance (Projected minus Actual):</i>	-259.60
<i>Reason For Variance:</i>	minor variance in hours, will rebalance

Measures

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

Other Measures

Survey Research Operations

Monthly Project Report

Development Initiative and No Data Collection Projects









































































June 2021



Developmental Initiatives

(Day in the Life Videos) TSME21-Day in the Life Videos (425201)
(TSME21- Illume Upgrade (424466)) TSME21- Illume Upgrade (424466)
(TSME21-Blaise 5 Testing (423562)) TSME21-Blaise 5 Testing (423562)
(TSME21-ColdFusion Server Upgrade (425197)) TSME21-ColdFusion Server Upgrade (425197)
(TSME21-DCO Tech System Support) TSME21-DCO Tech System Support (483248)
(TSME21-QC-Systems (483249)) TSME21-QC-Systems (483249)
(TSME21-RCLS (425196)) TSME21-RCLS
(TSME21-Replayer (425267)) TSME21-Replayer
(TSME21-SelfSchedUI (483424)) Self-Scheduling Interface for MSMS
(TSME21-ST international (483227)) TSME21 - ST international

NonArchived Development Initiative and No-DataCol Projects

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

Project Name (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 End:

Staffing Completed:

SS Train Start:

DC Start:

Pretest Start:

Recruitment Start:

GIT Start:

SS Train End:

DC End:

Other Project Russ Stark

Team Members: 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 June, 2021 (Day in the Life Videos) **Project Phase** Implementing

Risk Level Some Concerns

Monthly Update In June Russ did a bit of planning and testing in June with full production being planned for for a day in the life stay video for Fall recruitment.

Special Issues Full production to resume once we are back to the office.

Cost

Jul 13, 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: work was stalled due to the pandemic

Projections
Jul 13, 2021

Dollars Projected For Month: 0.00
Actual Dollars Used: 360.65
Variance (Projected minus Actual): -360.65
Reason For Variance: work was stalled due to the pandemic

Measures

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

Other Measures

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

Project Mode Primary: Not Available

Project Type Developmental Initiatives **Project Status** Current

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

Principal Investigator/Client

Funding Agency

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

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

Proposal #: no data

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

SRO Project Period 07/2020 - 06/2021

Data Col Period

Security Plan NA

Milestone Dates

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

Other Project

Team Members:

Other Project

Names:

Sample Mgmt Sys NA

Data Col Tool NA

Hardware NA

DE Software NA

QC Recording Tool NA

Incentive NA

Administration NA

Payment Type NA

Payment Method NA

Report Period June, 2021 (TSME21- Illume Upgrade (**Project Phase** Initiation

Risk Level On Track

Monthly Update 1. Hueichun has started to test the environment for MTF surveys.
 2. More vigorous testing will happen in 2022: DLL testing, survey upgrade testing, server performance testing.

Special Issues

Cost

Jul 13, 2021 *Total Cost to Date (Direct + Indirect):* 2,120.99
Estimated Cost at Completion (E\$AC): 2,120.99
Total Budget: 10,000.00
Variance (Budget minus E\$AC): 7,879.01
Reason For Variance: na

Projections
Jul 13, 2021

Dollars Projected For Month: 2,603.43
Actual Dollars Used: 257.49
Variance (Projected minus Actual): 2,345.94
Reason For Variance: na

Measures

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

Other Measures

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

Project Mode Primary: Not Available

Project Type Developmental Initiatives **Project Status** Current

Budget *Direct Budget:* 0.00 *Indirect Budget:* 0.00 *Total Budget:* 0.00

Principal Investigator/Client

Funding Agency

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

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

Budget Analyst: Janelle P Cramer

Production Manager:

Senior Project Advisor:

Production Manager:

Production Manager:

Proposal #: no data

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

SRO Project Period 07/2020 - 06/2021

Data Col Period

Security Plan NA

Milestone Dates

PreProduction Start:

Pretest Start:

Pretest End:

Recruitment Start:

Staffing Completed:

GIT Start:

SS Train Start:

SS Train End:

DC Start:

DC End:

Other Project

Team Members:

Other Project

Names:

Sample Mgmt Sys NA

Data Col Tool NA

Hardware NA

DE Software NA

QC Recording Tool NA

Incentive NA

Administration NA

Payment Type NA

Payment Method NA

Report Period June, 2021 (TSME21-Blaise 5 Testing (**Project Phase** Initiation

Risk Level On Track

Monthly Update This project has been exhausted all the funds at the end of June. New FY will have a new plan for this project

Special Issues

Cost *Total Cost to Date (Direct + Indirect):* 30,000.00

Jun 30, 2021 *Estimated Cost at Completion (E\$AC):* 30,000.00

Total Budget: 0.00

Variance (Budget minus E\$AC): 0.00

Reason For Variance:

Projections
Jun 30, 2021

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

Measures

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

Other Measures

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

Project Mode Primary: Not Available

Project Type Developmental Initiatives **Project Status** Current

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

Principal Investigator/Client

Funding Agency

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

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

Proposal #: no data

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

SRO Project Period 07/2020 - 06/2021

Data Col Period

Security Plan NA

Milestone Dates

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

Other Project

Team Members:

Other Project

Names:

Sample Mgmt Sys NA

Data Col Tool NA

Hardware NA

DE Software NA

QC Recording Tool NA

Incentive NA

Administration NA

Payment Type NA

Payment Method NA

Report Period June, 2021 (TSME21-ColdFusion Serve **Project Phase** Initiation

Risk Level On Track

Monthly Update 1. Holly has tested the Web Log and PIPPA on domestic domain. However, the ODNC/JDBC drives still could not work well. Holly and the team are trying to identify other solutions.
 2. Holly has tested the upgrade CF in International domain and plans to upgrade the CF environment in INLT domain in July 2021.

Special Issues

Cost Jul 13, 2021	<i>Total Cost to Date (Direct + Indirect):</i>	5,639.80
	<i>Estimated Cost at Completion (E\$AC):</i>	5,639.80
	<i>Total Budget:</i>	10,000.00
	<i>Variance (Budget minus E\$AC):</i>	4,360.20
	<i>Reason For Variance:</i>	na

Projections Jul 13, 2021	<i>Dollars Projected For Month:</i>	1,378.63
	<i>Actual Dollars Used:</i>	1,353.94
	<i>Variance (Projected minus Actual):</i>	24.69
	<i>Reason For Variance:</i>	na

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

Other Measures

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 End:

Staffing Completed:

SS Train Start:

DC Start:

Pretest Start:

Recruitment Start:

GIT Start:

SS Train End:

DC End:

Other Project

Team Members:

Other Project

Names:

Sample Mgmt Sys NA

Data Col Tool NA

Hardware NA

DE Software NA

QC Recording Tool NA

Incentive NA

Administration NA

Payment Type NA

Payment Method NA

Report Period June, 2021 (TSME21-DCO Tech System Support) **Project Phase** Initiation

Risk Level On Track

Monthly Update

1. Start to work on the new Name change modules. Add new download for iwer legal name and display name.
2. Add Display name to the key reports in Fred.
3. Create Census Rate for PSU module and batch uploaded data for Census Rate and ERI.
4. Add the link of In-Person Data Collection Guidelines for recruiting OS projects.
5. Discuss 2022 plan to use SSRS reports for some standard reporting options.
6. Miscellaneous support for different batch jobs and query.

Special Issues

Cost Jul 13, 2021	Total Cost to Date (Direct + Indirect):	32,077.04
	Estimated Cost at Completion (E\$AC):	32,077.04
	Total Budget:	25,000.00
	Variance (Budget minus E\$AC):	-7,077.04
	Reason For Variance:	DCO support was required that exceeded budgeted amounts.

Projections Jul 13, 2021	Dollars Projected For Month:	5,053.90
	Actual Dollars Used:	4,952.03
	Variance (Projected minus Actual):	101.87
	Reason For Variance:	final work took less time than had been allotted

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

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

Other Project

Team Members:

Other Project

Names:

Sample Mgmt Sys NA

Data Col Tool NA

Hardware NA

DE Software NA

QC Recording Tool NA

Incentive NA

Administration NA

Payment Type NA

Payment Method NA

Report Period June, 2021 (TSME21-QC-Systems (483249)) **Project Phase** Implementing

Risk Level On Track

Monthly Update The programmer worked on updating the data dictionary and upgrading software that hadn't been updated in several years. Project Manager spent additional times on preparing materials for FY22 developing plan, and supporting the cell phone verification project.

Special Issues none

Cost *Total Cost to Date (Direct + Indirect):* 30,168.58

Jun 30, 2021 *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
Jun 30, 2021

Dollars Projected For Month: 3,782.90
Actual Dollars Used: 4,857.65
Variance (Projected minus Actual): -1,074.75
Reason For Variance: Team had to make up work that hadn't been performed.

Measures

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

Other Measures

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

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

Other Project

Team Members:

Other Project Respondent Lookup

Names:

Sample Mgmt Sys SurveyTrak; SMS; Web SMS; MSMS

Data Col Tool NA

Hardware Other (MSMS and SuveyTrak servers)

DE Software NA

QC Recording Tool NA

Incentive Not used

Administration N/A

Payment Type N/A

Payment Method N/A

Report Period June, 2021 (TSME21-RCLS (425196)) **Project Phase** Implementing

Risk Level On Track

Monthly Update No new work this month.

Special Issues

Cost

Jun 30, 2021 *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
Jun 30, 2021

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

Measures

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

Other Measures

Project Name	(TSME21-Replayer (425267)) TSME21-Replayer															
Project Mode	Primary: Not Available															
Project Type	Developmental Initiatives			Project Status	Current											
Budget	Direct Budget:	20,000.00	Indirect Budget:	0.00	Total Budget:	20,000.00										
Principal Investigator/Client																
Funding Agency	SRC and HRS															
IRB	HUM#:		Period Of Approval:													
Project Team	Project Lead:		Jennifer C Arrieta													
	Budget Analyst:		Carl S Remmert													
	Production Manager:															
	Senior Project Advisor:		Gina-Qian Yang Cheung													
	Production Manager:															
Production Manager:																
Proposal #:	no data															
Description:	In collaboration with HRS, develop a utility: -For production data review for Blaise 5 projects, -That takes into account needs and design by multiple stakeholders, -That is agnostic of sample management systems, and -That has an underlying structure in place for future enhancements and continued Blaise 5 development.															
SRO Project Period	09/2019 - 06/2021															
Data Col Period																
Security Plan	NA															
Milestone Dates	<table><tr><td>PreProduction Start:</td><td>Pretest Start:</td></tr><tr><td>Pretest End:</td><td>Recruitment Start:</td></tr><tr><td>Staffing Completed:</td><td>GIT Start:</td></tr><tr><td>SS Train Start:</td><td>SS Train End:</td></tr><tr><td>DC Start:</td><td>DC End:</td></tr></table>						PreProduction Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
PreProduction Start:	Pretest Start:															
Pretest End:	Recruitment Start:															
Staffing Completed:	GIT Start:															
SS Train Start:	SS Train End:															
DC Start:	DC End:															
Other Project Team Members:	Youhong Liu, Colette Keyser, Jason Ostergren															
Other Project Names:	Replaher															
Sample Mgmt Sys	NA															
Data Col Tool	NA															
Hardware	Desktop															
DE Software	N/A															
QC Recording Tool	N/A															
Incentive	Not used															
Administration	N/A															
Payment Type	N/A															
Payment Method	N/A															

Report Period	June, 2021 (TSME21-Replayer (425267)	Project Phase	Closing
Risk Level	On Track		
Monthly Update	During the month, the team focused on programming and testing bug fixes in the Replayer utility. In addition, the team finished programming, testing and documentation for the set-up and deployment. The team also prepared for the final project review scheduled in July.		
Special Issues			

Cost
Jul 13, 2021

Total Cost to Date (Direct + Indirect): 16,929.68
Estimated Cost at Completion (E\$AC): 16,929.68
Total Budget: 20,000.00
Variance (Budget minus E\$AC): 3,070.32
Reason For Variance: Programmer hours less than projected as the team finished up Phase II programming work.

Projections
Jul 13, 2021

Dollars Projected For Month: 0.00
Actual Dollars Used: 301.50
Variance (Projected minus Actual): -301.50
Reason For Variance: CRS had not been updated with projections for June. Final programming and preparation for the July project review account for the variance.

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:	<p>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.</p> <p>Work involves the development of the outward facing interface as well as related MSMS core work.</p>						
SRO Project Period	07/2020 - 06/2021						
Data Col Period	NA						
Security Plan							
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="width: 50%; vertical-align: top;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>					PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:						
Other Project	James Rodgers - Tech Lead						
Team Members:	Holly Ackerman - Developer (MSMS API and other appointment related work) Peter Sparks - Developer (R facing page) Dave Padot - Development consultation Stakeholder team Kallan Larsen - Alternative scheduling representative Heather Schroeder - Stat Unit/Reporting representative Pooja Varma-Laughlin - SSL representative Gary Hein - HRS representative Maryam Buagelia - PSID representative Stacy Quisenberry - DCO/HRS/PSID representative						

Other Project**Names:**

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

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

Risk Level *On Track*

Monthly Update Time in June was devoted to figuring out a few lingering issues.

Timeouts seem to be affecting several things, including:

--Getting appointment data (which is resulting in not finding existing appointments, which means they can't be cancelled, and multiple appointments on a case)

--Writing contact attempts

--Writing sample attributes

There is a 15 second timeout on the Blaise server where the SS_Svc Windows Service is hosted. Holly has asked Peter to extend the timeout on the Blaise server. He is investigating how to do this. This may also help with some of the other issues.

The attributes endpoint has intermittent issues writing data (also affects the 68-ID site).

Once these have been addressed we can retest to make sure everything is working properly.

Special Issues**Cost**

Total Cost to Date (Direct + Indirect):	31,539.37
Estimated Cost at Completion (E\$AC):	31,539.37
Total Budget:	30,000.00
Variance (Budget minus E\$AC):	-1,539.37
Reason For Variance:	Spanish work and fixing bugs.

Projections

Dollars Projected For Month:	1,911.64
Actual Dollars Used:	1,429.57
Variance (Projected minus Actual):	482.07
Reason For Variance:	Spent less time due to ongoing investigations into API issues.

Measures

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

Other Measures

Project Name	(TSME21-ST international (483227)) TSME21 - ST international														
Project Mode	Primary: Not Available														
Project Type	Developmental Initiatives			Project Status	Current										
Budget	Direct Budget:	0.00	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	<table><tr><td>PreProduction Start:</td><td>Pretest Start:</td></tr><tr><td>Pretest End:</td><td>Recruitment Start:</td></tr><tr><td>Staffing Completed:</td><td>GIT Start:</td></tr><tr><td>SS Train Start:</td><td>SS Train End:</td></tr><tr><td>DC Start:</td><td>DC End:</td></tr></table>					PreProduction Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
PreProduction Start:	Pretest Start:														
Pretest End:	Recruitment Start:														
Staffing Completed:	GIT Start:														
SS Train Start:	SS Train End:														
DC Start:	DC End:														
Other Project Team Members:	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														
Pavment Method	NA														

Report Period	June, 2021 (TSME21-ST international)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	minors updates with ST international and FUM		
Special Issues			
Cost	Total Cost to Date (Direct + Indirect): 25,211.92 Estimated Cost at Completion (E\$AC): 37,434.01 Total Budget: 40,000.00 Variance (Budget minus E\$AC): 2,565.99 Reason For Variance: no issues		

Projections

Dollars Projected For Month: 3,461.05
Actual Dollars Used: 2,119.75
Variance (Projected minus Actual): 1,341.30
Reason For Variance: no issue

Measures

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

Other Measures