

Survey Research Operations

Monthly Project Report

Sponsored

September 2021



Sponsored Projects

(ACL6) *Americans' Changing Lives - Wave 6*
 (ACL-LIFE) *ACLLIFE Life History Interview and Validation*
 (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-21) *PSID Child Development Supplement 2021*
 (DAWN CS) *Detroit Area Wellness Program - COVID Supplement*
 (ECHO) *Environmental Influences on Child Health Outcomes*
 (EDC-Semi Structured) *Every Dollar Counts Semi-Structured Interviews*
 (H&WB) *Health and Wellbeing in Southeast Michigan*
 (HCAP 2020) *Harmonized Cognitive Assessment Protocol, 2020*
 (HCDC, H&C) *Housing & Children*
 (HRS 2020 ABT) *HRS 2020 COVID Antibody Test*
 (HRS 2021 OYMS / COVID Survey) *HRS 2021 Off-Year Mail Study / COVID Survey*
 (HRS 2022 Panel) *Health and Retirement Study 2022*
 (HRS2022-NewCohort) *HRS 2022 - New Cohort*
 (MARS 2) *Malaysia Ageing and Retirement Study Wave 2*
 (MI CReSS) *Michigan COVID-19 Recovery Surveillance Cohort Study*
 (MTF base year 2017-2022) *Monitoring the Future - Base Year 2017-2022*
 (MTF Panel (main data collection) 2021) *Monitoring the Future Panel (web) 2021*
 (PSID TAS 2021) *Transition to Adulthood within its Life Course & Intergenerational Family Context*
 (PSID21) *Panel Study of Income Dynamics 2021*
 (SCA 2021) *Surveys of Consumer Attitudes*
 (SCIP 2021) *Sustainability Culture Indicators Project*
 (STARRS-LS Waves 3 & 4) *Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study*
 (VCT) *Video Communication Technologies in Survey Data Collection*
 (WCJ -Remote Pilot) *Woodcock-Johnson Remote Administration Pilot*
 (WMH-Qatar) *Qatar World Mental Health Survey*

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
Data Col Period
Security Plan
Milestone Dates

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

PreProduction Start:

Pretest End:

Staffing Completed:

SS Train Start: 05/20/2021

DC Start: 06/17/2021

Pretest Start:

Recruitment Start:

GIT Start:

SS Train End: 08/10/2021

DC End: 11/15/2021

Other Project
Team Members:

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

Other Project

Names:

Sample Mgmt Sys

Data Col Tool

Hardware

DE Software

QC Recording Tool

Incentive

Administration

Payment Type

Payment Method

"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")
 SurveyTrak
 Blaise 4.8
 Desktop
 NA
 NA
 NA
 Yes, R
 SRO Group
 Check, prepaid (\$30 (interview)); Other (Check, prepaid - \$50 (consent to WBD/making home appointment))
 NA

Report Period

Sep, 2021 (ACL6)

Project Phase

Implementing

Risk Level

On Track

Monthly Update

ACL6 (reboot) data collection has resumed. At this time, the sample includes 82 ACL participants who have agreed to complete their ACL6 interview. We have now cross-trained 8 interviewers on the ACL6 instrument. As of today, there have been 17 interviews completed.

We're in week 7 of the planned 12 week extension of ACL data collection. The final target date for finishing all ACL-life data collection is now November 15. We have sent multiple messages to the ACL6 PI (Dr. Maggie Hicken), to verify this is consistent with her ACL6 (Reboot) data collect goals. However, we have not received confirmation of her expectations.

As a reminder, we are currently authorized by the PI to spend up to \$44,200 direct costs (\$69,000 total) to complete 10 additional ACL6 interviews. We've exceeded the number of interviews and are within budget. The funding for the reboot will be allocated only after the final, actual costs are known.

We'll continue to monitor production metrics, send updated cost reports and manage expectations. Nick wants us to keep an eye on the "costs vs. benefits," and report to him (and the PI, Maggie) with actual costs accumulated each month. We have done so.

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

Special Issues

Cost

Oct 08, 2021

Total Cost to Date (Direct + Indirect):	795,250.11
Estimated Cost at Completion (E\$AC):	808,977.77
Total Budget:	772,591.00
Variance (Budget minus E\$AC):	-36,386.77
Reason For Variance:	As of this report, \$22,729 has been spent to-date. The total, projected cost to complete is currently \$36,457.

Projections

Oct 08, 2021

Dollars Projected For Month:	7,793.79
Actual Dollars Used:	5,297.56
Variance (Projected minus Actual):	2,496.23
Reason For Variance:	Data management charges due to ACL6 (Tel-only Reboot) activity, including preparing training sample for Iwers, moving finalized lines off of laptops, and other ongoing DBA tasks. Also, we've incurred charges related to requesting new ACL6 ToA checks, sending new study packets, respondent follow up, project coordination, interviewer training, scheduling and interviewing.

Measures

	Units Complete	RR	HPI
Current Goal:	1,058 (1,526 sample)	80%	5
Goal at Completion:			
Current actual:	746	55%	6.7
Estimate at Complete:			
Variance:			

Other Measures

Home Visit Consent

Goal at Completion: 700

Current Actual: 413

Current Undecided: 20

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

Project Mode Primary: Telephone

Project Type Sponsored Projects **Project Status** Current

Budget **Direct Budget:** 520,637.00 **Indirect Budget:** 291,556.00 **Total Budget:** 812,193.00

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

Funding Agency

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

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

Proposal #: no data

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

SRO Project Period 04/2020 - 08/2021

Data Col Period 02/2021 - 08/2021

Security Plan NA

Milestone Dates

PreProduction Start: 04/01/2020

Pretest 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: 11/15/2021

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-CARL; DRI-CXM; Live monitoring
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post (\$30)
Payment Method	Check through STRak RPay System

Report Period	Sep, 2021 (ACL-LIFE)	Project Phase	Implementing
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Risk Level	<i>Some Concerns</i>
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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).
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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.

Here is a full list of intervention strategies implemented thus far:

- Increased ToA (\$50)
- Increased ToA (\$100)
- Increased ToA (\$200)
- Added Locator
- Used MSG batch services to support locating
- Postcard 1 mailing: all non-final sample
- Postcard 2 (SIMY) mailing: all non-final sample
- Postcard 3 (End Game) mailing: all non-final sample + locating leads
- Targeted mailings: addressing concerns/confidentiality letters
- Extend data collection for 8-12 weeks
- Implemented numerous weekly lwer goals / strategies, via Pooja and the production management team
- Continue working to reach goals and aiming to increase overall response rate given the PI's #1 priority and Nick's recommendation of a "kitchen sink approach"

Special Issues	Projected overrun continues to grow due to design modifications (i.e. 8-12 week data collection extension and increasing ToA to \$200) and other factors.
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A full summary of drivers and amounts attributed to each are as follows:

Participant ToA increased from \$30 to \$50 as of 5/12/21; from \$50 to \$100 on 7/8/21; and then from \$100 to \$200 on 8/6/21. (\$63,825)

Data Collection Extension of 12 additional weeks -- from 26 to 38. (\$11,215)

Fringe Benefits increases due to more staff hours being projected than originally budgeted. (\$26,328)

Hybrid Staff model includes both Survey Techs (from the Lab) and Field Interviewers (from the Field); there is a higher rate for Field Interviewers. (\$16,365)

ACL-Life instrument enhancements and life history grid functionality resulted in increased Blaise programming hours for implementing technical solutions, testing and technical support. (\$12,533)

Recharge Rate Increases - CAPI recharge rate for Field Interviewers Hiring & Training increased from \$1.10 to \$1.39; CASIC recharge rate increased from \$1.91 to \$2.50; Field Operations recharge rate increases from proposal \$3.41 to \$3.53 currently; Mobile Device @64.55 per cell phone per month. (\$9,432)

Help Desk support costs are exceeding the initial 40 hours included in the proposal budget. (\$4,626)

Cost
Oct 08, 2021

Total Cost to Date (Direct + Indirect): 762,927.04
Estimated Cost at Completion (E\$AC): 909,328.92
Total Budget: 812,193.00
Variance (Budget minus E\$AC): -97,135.92
Reason For Variance:

Of the \$520,637 total, direct budget, \$489,055 has been spent to-date. We currently project a direct cost overrun of \$77,797 (15%).

We communicated with the PI and financial manager about the IWER rate increase and new fringe rate of 10.4% (up from 7.65%) for Interviewers. We shared the impact report, including both the interviewers rate change and the FB increase. The impact on the IWER projections for the remaining months of extended data collection increased by \$3,215.21. This has contributed to the overall projected overrun on ACL-Life, which has increased by a total of \$4,978 from last month.

Our current projections include the estimated effort required to reach the 80% overall response rate target. We currently have 466 remaining non-final lines and would need to interview 262 of them to hit our target by November 15 (the deadline of the 12 week data collection extension).

Projections
Oct 08, 2021

Dollars Projected For Month: 78,527.13
Actual Dollars Used: 56,362.04
Variance (Projected minus Actual): 22,165.09
Reason For Variance:

The Interviewer hours projected are lower than actuals this month.

Measures

	Units Complete	RR	HPI
Current Goal:	966 (n=1,284-77 NS)	80%	5
Goal at Completion:			
Current actual:	704	58%	7.61
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:

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

Other Project
Names:

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

Sample Mgmt Sys

MSMS

Data Col Tool

Blaise 5; SAQ

Hardware

Desktop

DE Software

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

QC Recording Tool

N/A

Incentive

Yes, R

Administration

SRO Group

Payment Type

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

Payment Method

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

Report Period

Sep, 2021 (AFHS)

Project Phase

Implementing

Risk Level

Some Concerns

Monthly Update

September update

- Testing the protocol and troubleshooting - then retesting.

- Sample was released between 9/20-9/23 (loaded between 8/31-9/7)

- Screener invite letters were mailed on 9/23 (n=22,381)

- When sample was released the Authorisation Service (MSMS) was not updated for 1,999 cases. This means that the log-in credentials provided would not have been recognised and the web screener not accessible for these cases until the issue was resolved on Tuesday 28 September. Of the 1,999 cases affected, 28 attempted to log-in but were not able to do so.

- Reminder postcard mailed to all addresses on Thursday 30 September (n=22,381)

Special Issues

Cost

Oct 08, 2021

Total Cost to Date (Direct + Indirect):

2,019,726.62

Estimated Cost at Completion (E\$AC):

2,365,491.07

Total Budget:

2,490,133.00

Variance (Budget minus E\$AC):

124,641.93

Reason For Variance:

Any underspend will be used by the end of the project on interventions to boost response/test a panel design.

Projections

Oct 08, 2021

Dollars Projected For Month:

68,897.95

Actual Dollars Used:

34,483.82

Variance (Projected minus Actual):

34,414.13

Reason For Variance:

Variance is due to the delayed production launch - respondent TOAs need to be re-distributed across the production period. We also received a credit for uncashed cheques from Rep 1.

Measures

	Units Complete	RR	HPI
<i>Current Goal:</i>	2000	33.3%	NA
<i>Goal at Completion:</i>	2000	33.3%	NA
<i>Current actual:</i>	239	52%	NA
<i>Estimate at Complete:</i>	1000	68%	NA
<i>Variance:</i>	1000	+34.6% (see below)	NA

Other Measures

Reporting main response rate for Rep 2 above and estimates used in the proposal (screener RR details are below)...

Estimates used in the proposal...

Screener RR - 50% (used in the proposal) - Full sample 42,120, goal 50% screener RR to achieve a sample of 12,000 eligible Rs (eligibility rate 57%), achieve main interviews with 4,000 (RR 33.3%).

Rep 1 achieved...

Rep 1 sample (n=19,381), actual screener RR 14% (n=2523), eligible Rs 1489 (eligibility rate 59%), main RR 66% (n=998).

Rep 2 current ...

Rep 2 sample (n=22,381), current actual screener RR 3.6% (n=860), current eligibility rate 68% (n=558), current main RR 52% (n=239)

Project Name (ALS Controls) ALS Matched Control Recruitment

Project Mode Primary: Web

Project Type Sponsored Projects **Project Status** Current

Budget **Direct Budget:** 163,550.33 **Indirect Budget:** 91,589.18 **Total Budget:** 255,139.51

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

Funding Agency

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

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

Proposal #: no data

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

SRO Project Period 01/2020 - 12/2023

Data Col Period 09/2020 - 10/2023

Security Plan NA

Milestone Dates

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

Other Project Dan Zahs (Sampling)

Team Members:

Other Project

Names:

Sample Mgmt Sys NA

Data Col Tool Other (Qualtrics)

Hardware NA

DE Software NA

QC Recording Tool NA

Incentive Yes, R

Administration ISR Group (SRC Business Office)

Payment Type Check, post (10)

Payment Method NA

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

Risk Level On Track

Monthly Update September: This month saw the transition of the ALS Controls SPA from Pete Batra to Meredith House. Meredith met with Pete and Becky to review the tasks regarding the Qualtrics account and survey, and to transfer the account to Meredith. Becky and Meredith met with Megan Gomez-Mesquita to review the budget and timeline. Meredith was introduced to the Michigan Medicine team - Blake and Stacey - who reported receiving approval for an ALS Controls Facebook ad which proceeded to generate interest. Recruitment is going well and the client is pleased with the pace of the project.

Special Issues

Cost
Oct 17, 2021

Total Cost to Date (Direct + Indirect): 66,052.40
Estimated Cost at Completion (E\$AC): 177,168.31
Total Budget: 255,139.51
Variance (Budget minus E\$AC): 77,971.20
Reason For Variance: Minor projection updates.

Projections
Oct 17, 2021

Dollars Projected For Month: 10,001.83
Actual Dollars Used: 9,477.13
Variance (Projected minus Actual): 524.70
Reason For Variance: Minimal 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	(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:	5,363,660.00	Indirect Budget:	1,945,980.73 Total Budget: 7,309,640.73
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:	Veronica Connors-Burge		
	Senior Project Advisor:	Stephanie A Chardoul		
	Production Manager:	Margaret Lavanger		
	Production Manager:	Michelle Smith		
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

Sep, 2021 (BFY)

Project Phase

Implementing

Risk Level*On Track***Monthly Update**

Project updates:

BFY Age 3 data collection continues on goal in week 16 with +13 interviews ahead of the cumulative goals. Unfortunately, one of the NH in NOLA hired and trained in September has resigned due to health issues.

BFY new funds to continue past 3-year interview have been added to the budget. The effort is being kicked off in October 2021. We will stay in touch with the families and update the contact information. SRO will re-contact Rs 3.5 and 6.5 months after the focal child 3rd b-day and then, at 46 months (Age 3 + 10 months) SRC will pass contact information for the families to the research labs which will invite respondents to the Age 4 lab visit. The handoff of the contact information concludes SRC involvement in the Age 0 - 4 part of the project.

Data collection / Sample:

Age 3 results by site through week 7:

	Goal	Actual	+/-
Overall	220	233	
Nebraska	52	63	
New York	75	82	
Minnesota	30	21	
Louisiana	63	67	

Staffing:

Age 3 Staffing:

14 iwers in total

NE: 1 + 1 NH (Trained 9/15)

MN: 2

NY: 6 OS

NOLA: 3 + Resigned: 1 NH (Trained 9/15)

Locators: 2"

Technical system:

Development of BFY Age 3 - 4 follow up was a bit delayed due to programmers availability (working on TAS and HRS), however, BFY can adapt to this by streamlining the initial September / October request.

Earlier in October (10/5) an interviewer reported seeing multiple names in the HH roster. Data Ops confirmed an issue with the preload and reported that 32 lines were affected. Of those 5 interviews were completed and 27 lines needed to be fixed before interviews (however only 7 lines were released and active / others were in the midwave protocol). The fix was issued on 10/8 and work on the lines resumed. However, on Friday 10/15 another interviewer reported a seemingly unrelated issue affecting her ability to deploy the digital consent. Data Ops traced the consent issue back to the original fix for the HH roster. As a result, on 10/18 we had to put 7 active lines on hold until the preload was fixed on 10/19 Tuesday morning.

Special Issues

Cost

Oct 17, 2021

Total Cost to Date (Direct + Indirect): 5,886,666.08

Estimated Cost at Completion (E\$AC): 7,828,310.17

Total Budget: 7,309,640.73

Variance (Budget minus E\$AC): -518,669.44

Reason For Variance:

Several budget changes are reflected. We have added new funding to cover Age 3-4 extension. Pls have also lost one source of funding (\$150K) which was added to the overrun. Funds are requested to cover -\$518K which actually reflects savings of about \$66,530 since our last shared overrun estimate in October 2020. Estimated overrun in 10/2020 was \$435,000 and is now \$368,470 but due to the loss of funding a larger amount still needs to be covered.

Projections

Oct 17, 2021

Dollars Projected For Month: 113,349.71

Actual Dollars Used: 122,558.86

Variance (Projected minus Actual): -9,209.15

Reason For Variance: Direct spend was as projected. Variance is attributed to the indirect costs.

Measures

	Units Complete	RR	HPI
Current Goal:	220	22%	7.0
Goal at Completion:	907	93%	7.0
Current actual:	233	23%	5.7
Estimate at Complete:	907	93%	6.0
Variance:			

Other Measures

Project Name	(C.A.R.E.) Concussion Assessment, Research and Education (CARE) Consortium					
Project Mode	Primary: Telephone	Secondary: Mail	Total of Modes: 2			
Project Type	Sponsored Projects		Project Status	Current		
Budget	Direct Budget:	1,144,724.28	Indirect Budget:	320,931.14		
			Total Budget:	1,537,084.42		
Principal Investigator/Client	Dr. Steven Broglio (U of M Kinesiology) Dr. Michael McCrea (Medical College of Wisconsin) Dr. Thomas McAllister (Indiana University School of Medicine)					
Funding Agency						
IRB	HUM#:	Period Of Approval:				
Project Team	Project Lead:	Donnalee Ann Grey-Farquharson				
	Budget Analyst:	Mary Johnson				
	Production Manager:	Barbara Aghababian-Homburg				
	Senior Project Advisor:	Barbara Lohr Ward				
	Production Manager:					
	Production Manager:					
Proposal #:	no data					
Description:	<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%;"> <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 Sep, 2021 (C.A.R.E.) **Project Phase** Closing
Risk Level On Track
Monthly Update Project Management:
 -Continue on working on new funding budget with the PI team for the next wave.
 -Reviewing the final report to SRC Admin.

 Data Manager:
 - Continue on wrapping up final data cleaning process.
 Questionnaire:
 - N/A

 System
 - Continue to discuss some modifications for the system.

 Data Collection:
 - N/A

 Adjusted Production Stats as of 09/30/2021:
 Overall RR: 35.5%
 Total Released Cases: 11725
 Total Complete IW: 3828
 Total Complete WEB IWs = 3612; CATI Comp IWs= 215

Special Issues

Cost
Sep 30, 2021

Total Cost to Date (Direct + Indirect):	1,468,093.66
Estimated Cost at Completion (E\$AC):	1,468,093.66
Total Budget:	1,537,084.42
Variance (Budget minus E\$AC):	68,990.76
Reason For Variance:	1. Projection will be adjusted to reflect the full work scope for the post-data collection extension. 2. Project has been closed on 08/31/2021. Only the data manager spent a few hours on doing the final data cleaning tasks.

Projections
Sep 30, 2021

Dollars Projected For Month:	3,371.65
Actual Dollars Used:	2,879.20
Variance (Projected minus Actual):	492.45
Reason For Variance:	project has been closed on 08/31/2021. Only the data manager worked on some final data cleaning tasks.

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

Other Measures

Project Name	(CAMS 2021) HRS 2021 Consumption and Activity Mail Study																								
Project Mode	Primary: Mail		Total of Modes: 1																						
Project Type	Sponsored Projects		Project Status	Current																					
Budget	Direct Budget:	293,821.00	Indirect Budget:	105,776.00	Total Budget: 399,597.00																				
Principal Investigator/Client	David Weir (ISR-SRC)																								
Funding Agency																									
IRB	HUM#:	HUM00079949	Period Of Approval:	1/28/2021 - 1/27/20																					
Project Team	Project Lead:	Deborah Zivan																							
	Budget Analyst:	Grace Tison																							
	Production Manager:																								
	Senior Project Advisor:	Nicole G Kirgis																							
	Production Manager:	Evanthia Leissou																							
	Production Manager:																								
Proposal #:	no data																								
Description:	CAMS is part of the Health and Retirement Study (HRS). The goal of CAMS is to gather additional data on household consumption and activities of daily living from participants in the HRS. In 2021, a paper questionnaire will be mailed to approximately 8,000 respondents of which 6,000 will receive the full questionnaire and 2,000 spouse/partners will receive a brief questionnaire.																								
SRO Project Period	05/2021 - 05/2022																								
Data Col Period	09/2021 - 04/2022																								
Security Plan	NA																								
Milestone Dates	<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>09/24/2021</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:	09/24/2021	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:	09/24/2021	DC End:	04/30/2022																						
Other Project Team Members:	Data Manager: Laura Yoder, Jennie Williams Programmer: Ashwin Dey Project Assistant: Jeannie Baker, Janet McBride, Melissa Luker																								
Other Project Names:	CAMS																								
Sample Mgmt Sys	MSMS																								
Data Col Tool	SAQ																								
Hardware	Paper and Pencil																								
DE Software	Other (HRS study staff is responsible for)																								
QC Recording Tool	N/A																								
Incentive	Yes, R; Yes, Other (Spouse)																								
Administration	SRO Group																								
Payment Type	Check, prepaid (\$25 to main R and \$10 to spouse R)																								
Payment Method	Check through STRak RPay System																								

Report Period	Sep, 2021 (CAMS 2021)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	During September the team: 1) Worked with DataForce (fulfillment vendor for mailings) to finalize the sample 2) Tested and made improvements to the survey management system 3) Performed quality control checks of the invitation mailing prepared by DataForce 4) Developed plan to deliver booklets to project staff via ISR duplicating The invitation mailing was sent on 9/27/2021 to 7,302 respondents. No SAQs were returned in September.		

Special Issues

The invitation mailing was delayed by 5 days due to a paper shortage.

Cost

Oct 13, 2021

Total Cost to Date (Direct + Indirect): 263,538.15
Estimated Cost at Completion (E\$AC): 380,512.81
Total Budget: 399,597.00
Variance (Budget minus E\$AC): 19,084.19
Reason For Variance:

The cost of using POUR trackable mail for returned questionnaires has been removed from the budget. In addition, the sample size decreased from 7938 to 7325.

Projections

Oct 13, 2021

Dollars Projected For Month: -5,292.99
Actual Dollars Used: 23,055.35
Variance (Projected minus Actual): -17,762.36
Reason For Variance:

In August, a DataForce invoice for the OYMS project was charged to the CAMS shortcode. A credit for this charge was made to the CAMS shortcode in September. This credit resulted in an overall negative dollar projection for the month of September. In addition, CAMS used fewer staff hours than anticipated because of the delayed field start and a the switch to a different sample management system.

Measures

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

Other Measures

Project Name	(CBII) Mellon College and Beyond II				
Project Mode	Primary: Web Total of Modes: 1				
Project Type	Sponsored Projects	Project Status	Current		
Budget	Direct Budget: 643,762.00	Indirect Budget: 0.00	Total Budget: 643,762.00		
Principal Investigator/Client	Paul Courant (Gerald R Ford School of Public Policy) Kevin Stange (Gerald R Ford School of Public Policy) Susan Jekielek (ICPSR)				
Funding Agency	The Mellon Foundation				
IRB	HUM#: 00173324	Period Of Approval:	10/2020-10/2021		
Project Team	Project Lead: Maureen Joan O'Brien Budget Analyst: Carl S Remmert Production Manager: Lisa J Carn Senior Project Advisor: Nicole G Kirgis Production Manager: James Koopman Production Manager:				
Proposal #:	no data				
Description:	<p>The purpose of the College and Beyond II project is to help educators better understand the importance of students' undergraduate experiences in and out of the classroom to their life-course development. College graduates with an undergraduate degree were invited to participate in a 35-45 minute web survey. Sample was selected from the following universities: The University of Michigan (U-M), Truman State University, the City College of New York (CUNY), Indiana University Bloomington (IU), Georgia College & State University (GCSU), the University of Houston (UH), and the University of California, Irvine (UCI). A pilot was completed in fall 2019. A pilot was completed in 2019 to refine and test the measures used in order to create a questionnaire that could better assess the value of an undergraduate education. The RR goal is ~20% (n=3,000) as well. There is a reminder calling and manual locating effort.</p> <p>R's were invited by letter and email. Each participant will receive a \$30 check as a token of appreciation. SRO is responsible for processing checks. Four open-ended occupation/industry questions are included in the survey. This includes, type of work performed, job duties, job title, and specific business/industry. Responses to the occupation questions will be coded by PDMG and SSL staff. The instrument was programmed using Illume, and the sample management system is Blaise SMS. Each day, all sample is delivered from Illume to Blaise via batch process. All non-final sample will be delivered to iwers for reminder calling or locating. Sample with a finalized result code will not be delivered to iwers.</p>				
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:
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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 Sep, 2021 (CBII) **Project Phase** Implementing

Risk Level On Track

Monthly Update Data collection officially ended on 7/25/2021 with 2,804 completed interviews. While the goal was to complete 3,000, the PI's were happy with this number completed. Part of the reason for this is that lwer effort was put toward reminder calling and locating targeted groups that were harder to reach. Sample balance was more important than yield, to the PI's. 607 surveys were completed after having been contacted by reminder callers. Another contributor to lower yield is the emphasis that has been placed on subgroups throughout reminder calling and manual locating. Occupation/industry coding is completed. 2,751 cases contained occ/industry items to code. Weighting has been completed and a final weighted data file has been delivered. Pieces of the final report have been provided to the Co-PI at her request for ICPSR documentation. The report is being finalized this month.

Special Issues None currently

Cost
Oct 17, 2021

Total Cost to Date (Direct + Indirect):	628,930.57
Estimated Cost at Completion (E\$AC):	640,137.49
Total Budget:	643,762.00
Variance (Budget minus E\$AC):	3,624.51
Reason For Variance:	Projected cost to close is in good shape.

Projections
Oct 17, 2021

Dollars Projected For Month:	19,618.91
Actual Dollars Used:	19,055.58
Variance (Projected minus Actual):	563.33
Reason For Variance:	More respondent payments hit account than anticipated, as well as lwer hours.

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

Other Measures

Project Name (CDS-21) PSID Child Development Supplement 2021

Project Mode Primary: Telephone Total of Modes: 1

Project Type Sponsored Projects **Project Status** Current

Budget **Direct Budget:** 1,466,821.00 **Indirect Budget:** 821,419.00 **Total Budget:** 2,288,240.00

Principal Investigator/Client Narayan Sastry
Paula Fomby

Funding Agency

IRB **HUM#:** HUM00166316 **Period Of Approval:**

Project Team **Project Lead:** Sarah Crane
Budget Analyst: Megan Gomez-Mesquita
Production Manager: Barbara Aghababian-Homburg
Senior Project Advisor: Stephanie A Chardoul
Production Manager: Maryam N Buageila
Production Manager: Kasyera Kowalczyk

Proposal #: no data

Description: A 2021 wave of the Childhood Development Supplement (CDS) is planned for November 2021 – June 2022. CDS 2021 sample is comprised of family units (FUs) with CDS eligible children that completed CDS19 and PSID21. Approximately 2,400 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). Interviews will be completed in English and Spanish. We anticipate multiple releases of sample, based on PSID21 completion. CDS21 sample also includes ~1000 families that are included in TAS21 data collection.

SRO Project Period 05/2021 - 11/2022

Data Col Period 11/2021 - 06/2022

Security Plan NA

Milestone Dates

PreProduction Start: 06/01/2021	Pretest Start:
Pretest End:	Recruitment Start: 07/12/2021
Staffing Completed: 09/08/2021	GIT Start:
SS Train Start: 10/28/2021	SS Train End: 11/04/2021
DC Start: 11/08/2021	DC End: 06/18/2022

Other Project Rachel Orlowski Project Consultant

Team Members: Peggy Lavanger Production Management QC Support
Kallan Larsen Training Coordinator
Kasyera Kowalczyk Project Management Support

Other Project Names:

Sample Mgmt Sys SurveyTrak

Data Col Tool Blaise 4.8

Hardware Laptop; [UM cell] Phone

DE Software NA

QC Recording Tool DRI-CARI

Incentive Yes, R

Administration NA

Payment Type Other (electronic payment)

Payment Method Check through STRak RPay System

Report Period Sep, 2021 (CDS-21) **Project Phase** Implementing

Risk Level On Track

Monthly Update The project team is busy finalizing training materials. IDPM signed off on the Blaise instruments on Friday 10/8. SRO signed off on integrated systems on Thursday 10/14, slightly past our 10/12 deadline due to a last minute critical issue identified during testing. Iwers will begin their home study on Wednesday 10/20.

TL training is Monday 10/25, TTT is 10/26-10/27 and SS training begins Thursday 10/28 (continuing through 10/29, 11/1-11/4).

IVR fixes and testing are on-going. With guidance from Barb Ward, the project team has been updating study protocols to incorporate new policies related to minors in research.

Next up: materials will be translated into Spanish and submitted for IRB approval, with a planned training and launch of Spanish in December.

Special Issues

Cost Oct 13, 2021	Total Cost to Date (Direct + Indirect):	123,459.82
	Estimated Cost at Completion (E\$AC):	2,238,001.13
	Total Budget:	2,288,240.00
	Variance (Budget minus E\$AC):	50,238.87
	Reason For Variance:	

Projections Oct 13, 2021	Dollars Projected For Month:	124,759.90
	Actual Dollars Used:	93,542.42
	Variance (Projected minus Actual):	31,217.48
	Reason For Variance:	The interviewer rate increase *is* incorporated in this cost report, but we also had savings in reducing some projected management hours (mainly Barb's), removing the projection to purchase new interviewer cell phones, and some staff underruns from September that we did not need to roll forward, which combined mostly offset the interviewer rate increase.

Measures

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

Other Measures

Project Name	(DAWN CS) Detroit Area Wellness Program - COVID Supplement				
Project Mode	Primary: Telephone Total of Modes: 1				
Project Type	Sponsored Projects	Project Status	Current		
Budget	Direct Budget: 332,148.00	Indirect Budget: 169,097.00	Total Budget: 501,245.00		
Principal Investigator/Client	Kristine Ajrouch (Life Course Development Program, ISR) Toni Antonucci (Life Course Development Program, ISR) Laura Zahodne (Life Course Development Program, ISR)				
Funding Agency					
IRB	HUM#: HUM00154638	Period Of Approval:			
Project Team	Project Lead: Juan Carlos Donoso Budget Analyst: Parina Kamdar Production Manager: Taghreed Lovell Senior Project Advisor: Kirsten Haakan Alcser Production Manager: Production Manager:				
Proposal #:	no data				
Description:	Conduct 600 phone interviews: 200 white, 200 black, 200 MENA respondents. 200 white Rs and 50 black Rs will come from wave 3 of the Social Relations Study sample. 200 MENA Rs and 150 black Rs will come from newly screened sample. 30 minute instrument, including a section on social relations, short cognitive assessments, experiences during COVID pandemic and socio-demographic questions.				
SRO Project Period	10/2020 - 05/2021				
Data Col Period	12/2020 - 04/2021				
Security Plan	NA				
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> PreProduction Start: 10/01/2020 Pretest End: Staffing Completed: 11/10/2020 SS Train Start: 12/02/2020 DC Start: 12/07/2020 </td> <td style="padding: 5px;"> Pretest Start: Recruitment Start: GIT Start: 11/30/2020 SS Train End: 12/04/2020 DC End: 04/15/2021 </td> </tr> </table>			PreProduction Start: 10/01/2020 Pretest End: Staffing Completed: 11/10/2020 SS Train Start: 12/02/2020 DC Start: 12/07/2020	Pretest Start: Recruitment Start: GIT Start: 11/30/2020 SS Train End: 12/04/2020 DC End: 04/15/2021
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Other Project Team Members:	Ian Ogden, Kasyera Kowalczyk, Lisa Van Havermaet, Ashwin Dae, Jeffrey Smith, David Dybicki, John Gawlas, Brad Goodwin				
Other Project Names:	D-AMP CS				
Sample Mgmt Sys	SurveyTrak				
Data Col Tool	Blaise 4.8				
Hardware	Laptop; [UM cell] Phone				
DE Software	Blaise 4.8 BIA				
QC Recording Tool	DRI-CARI; Camtasia				
Incentive	Yes, R				
Administration	SRO Group				
Payment Type	Check, prepaid (\$25)				
Payment Method	Check through STRak RPay System				

Report Period	Sep, 2021 (DAWN CS)	Project Phase	Implementing
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Risk Level	On Track
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Monthly Update	- Production was stopped on 7/19 - Final production stats: 207 black completes, 202 MENA completes and 140 white completes - We were not able to reach the goals for white respondents due to the low performance of the SRS sample. - The PI team has requested that we go back to complete interviews with 60 white Rs. This will be a supplemental data collection with a different budget, which will be funded with internal funds from the PIs. - Supplemental data collection done. 62 interviews completed
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Special Issues

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

Cost

Total Cost to Date (Direct + Indirect):	475,266.00
Estimated Cost at Completion (E\$AC):	503,465.00
Total Budget:	501,245.00
Variance (Budget minus E\$AC):	-2,221.00
Reason For Variance:	Supplemental data collection for white respondents is being paid with PI funds (no indirect costs). Data collection was completed on 10/13. We are currently projecting an underrun of 9,413 direct. Once the October ET is submitted by regular staff, we will have a final cost report to present to the clients.

Projections

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

Measures

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

Other Measures

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

Sep, 2021 (ECHO)

Project Phase

Implementing

Risk Level*Some Concerns***Monthly Update**

[Phase 1: Recruitment and Prenatal Surveys]

Recruitment continues in 7 prenatal clinics.

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

Production Stats

To date, 1,213 women have been recruited in clinics. Among those cases, 862 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 between now and next August is to complete recruitment of this representative sample and Mike Elliott can begin weighting.

[Phase 2: 3-Month Data Collection Summary]

Babies born: 730
 3-month sample released: 729
 3-month interviews completed: 518
 3-month biospecimen collected: 314
 Average attempts / lw: 7.6

lw length: 55
Response Rate: 72%

[Phase 3: Age 4 Protocols]

Pre-production work continues 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, WebLog) is in progress and will facilitate the administration of age 4 protocols, including REDCap surveys. A project resource (Kasyera) has been added to the team, with limited availability, but has extensive experience with REDCap and proficiency with technical systems development. An additional project management resource (SSA/SSI) is needed to support ECHO Age 4 protocols.

In early 2022, after an initial training on the REDCap system for data collection, 1-2 SRO data collection staff are expected to begin contacting participants eligible for the Age 4 protocols, as they age into the sample. About 81 mothers and children are expected between January 2022-August 2023. The Age 4 protocols include the administration of REDCap surveys and in-home visits, including administration of assessments, obtaining physical measures, and collecting bio-specimens.

Special Issues

Cost
Oct 08, 2021

Total Cost to Date (Direct + Indirect):	334,326.64
Estimated Cost at Completion (E\$AC):	334,326.64
Total Budget:	407,722.00
Variance (Budget minus E\$AC):	73,395.36

Reason For Variance: We ended Project Budget Y5 on August 31 with a significant underrun, which was expected.

We have not received our SRO sub Project/Grant for ECHO Y6. Parina extended shortcodes for Y5, so our team members and field interviewers can charge their hours. However, we'd like to reduce the possibility of effort recertification if possible.

My understanding is that Nancy Oeffner at SRC sent a message to Dean Michalak in Sponsored Programs, asking for an update. She reported that the Year 6 modification is still in financial processing and the new PG isn't reflected in eResearch.

Budget Year 6 began on September 1. We believe the Year 6 budget, combined with the Years 1-4 Carry-forward budget, includes sufficient time for SRO to learn and implement Age 4 protocols (REDCap, in-home visits and biospecimen collection) -- and to support SRO's overall scope of work for Year 6 (Phase 1: Recruitment; Phase 2: 3-month Interview; and Phase 3: Age 4 protocols). However, we'll continue to monitor as we dig into the Y6 scope.

The understanding from our MSU client is that if we (SRC/SRO) need additional funds for our Year 6 budget, we may apply for these Year 5 Carry-forward funds when they become available to MSU (via NIH sponsor) sometime in November 2021.

Projections
Oct 08, 2021

Dollars Projected For Month:	58.35
Actual Dollars Used:	20,324.93
Variance (Projected minus Actual):	-20,266.58

Reason For Variance: SurveyTrak programmer hours projected were higher than actual hours. We've since added another project manager resource to help with Age 4 protocols and develop specifications for the SurveyTrak sample management system.

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

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%; 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: 04/01/2020</td> </tr> <tr> <td style="padding: 5px;">Staffing Completed: 06/01/2020</td> <td style="padding: 5px;">GIT Start:</td> </tr> <tr> <td style="padding: 5px;">SS Train Start: 06/20/2020</td> <td style="padding: 5px;">SS Train End: 07/05/2020</td> </tr> <tr> <td style="padding: 5px;">DC Start: 08/01/2020</td> <td style="padding: 5px;">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	Sep, 2021 (EDC-Semi Structured)	Project Phase	Closing
Risk Level	On Track		
Monthly Update	<p>Interviewing went well. Final version of final report delivered to PI team. HPI under projection. 124/129 interviews completed for a 96% RR.</p> <p>Final cost report totals are listed above. Will archive project shortly.</p>		
Special Issues	None.		

Cost

Total Cost to Date (Direct + Indirect): 375,082.00
Estimated Cost at Completion (E\$AC): 375,082.00
Total Budget: 456,620.00
Variance (Budget minus E\$AC): 81,538.00
Reason For Variance: All training and interviewing completed by phone. Travel/hosting budget was not spent. Iwing slightly under projection due to Pls keeping some of the sample in Phase 2.

Projections

Dollars Projected For Month: 15,000.00
Actual Dollars Used: 12,800.00
Variance (Projected minus Actual): 2,200.00
Reason For Variance: None

Measures

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

Other Measures

Project Name	(H&WB) Health and Wellbeing in Southeast Michigan													
Project Mode	Primary: Face to Face Total of Modes: 1													
Project Type	Sponsored Projects		Project Status	Current										
Budget	Direct Budget:	1,433,860.00	Indirect Budget:	802,964.00 Total Budget: 2,317,801.68										
Principal Investigator/Client	Kristine Ajrouch (Life Course Development Program, SRC) Toni Antonucchi (Life Course Development Program, SRC) Laura Zahodne (Life Course Development Program, SRC)													
Funding Agency														
IRB	HUM#:	HUM00146040	Period Of Approval:	4/9/2020										
Project Team	Project Lead:	Juan Carlos Donoso												
	Budget Analyst:	Parina Kamdar												
	Production Manager:	Theresa Camelo												
	Senior Project Advisor:	Kirsten Haakan Alcser												
	Production Manager:	Ian Ogden												
	Production Manager:	Ian Ogden												
Proposal #:	no data													
Description:	Conduct 600 interviews with recently identified Arab Americans aged 65 or older residing in Southeast Michigan and 330 interviews with Social Relations sample members aged 65 or older. The Arab American sample will be selected based on an in-person household screening. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements. Social Relations respondents will only complete the cognitive interview. An informant interview will also be conducted for all sample members. Interviews will be conducted in English or Arabic. A pretest will be conducted in August 2019 with main data collection occurring from November 2019 through July 2020.													
SRO Project Period	05/2019 - 08/2020													
Data Col Period	11/2019 - 07/2020													
Security Plan	No													
Milestone Dates	<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:	Taghraid 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	Sep, 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

Total Cost to Date (Direct + Indirect):	1,001,099.00
Estimated Cost at Completion (E\$AC):	2,510,214.00
Total Budget:	2,317,801.68
Variance (Budget minus E\$AC):	-222,412.00
Reason For Variance:	The projected overrun increased significantly after new interviewer rates and recharges were calculated, even after we moved approximately 45% of interviewer hours to Interviewer 1 (new hires, not bilingual).

Projections

Dollars Projected For Month:	0.00
Actual Dollars Used:	1,235.00
Variance (Projected minus Actual):	-1,235.00
Reason For Variance:	Hours for interviewer recruitment charged by Mark Baker.

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:														
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	<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:	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	Sep, 2021 (HCAP 2020)	Project Phase	Planning
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Risk Level	On Track
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Monthly Update	There was no activity on HCAP2020 this month. Most effort is being put into HCAP Ireland work. 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.
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Although development of the HCAP Video training for Ireland is complete, after meeting with HCAP Ireland staff, we will need to make very minor edits to some of the video content. In addition, due to licensing issues with Logical Memory and Ravens no longer being allowed to be programmed, we will need to change administration protocols to paper and pencil for these tests. Changes to Brave Man, Logical Memory are underway including changes to videos, scripts, slides, and scoresheets. Additionally, 2 more short videos - Intro and outro - are being finalized. We continue to meet with HCAP Ireland and answer their questions about the cognitive tests and training.

Special Issues

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

**Cost
Oct 17, 2021**

Total Cost to Date (Direct + Indirect):	184,079.80
Estimated Cost at Completion (E\$AC):	4,249,307.18
Total Budget:	4,488,000.00
Variance (Budget minus E\$AC):	238,692.82
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
Oct 17, 2021**

Dollars Projected For Month:	742.22
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	742.22
Reason For Variance:	n/a

Measures

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

Other Measures

Project Name	(HCDC, H&C) Housing & Children					
Project Mode	Primary: Face to Face Total of Modes: 1					
Project Type	Sponsored Projects		Project Status	Current		
Budget	Direct Budget:	9,806,418.00	Indirect Budget:	2,236,640.00 Total Budget: 12,043,058.00		
Principal Investigator/Client	Sandra Newman (Johns Hopkins University) Tama Leventhal (Tufts University)					
Funding Agency	NICHD, HUD, RWJ Foundation, MacArthur Foundation					
IRB	HUM#:	HUM00114794	Period Of Approval:			
Project Team	Project Lead:	Barbara Lohr Ward				
	Budget Analyst:	Parina Kamdar				
	Production Manager:	Veronica Connors-Burge				
	Senior Project Advisor:	Grant D Benson				
	Production Manager:	Becky Kay Scherr				
	Production Manager:	Carlos Andres Macuada Lopez				
Proposal #:	no data					
Description:	<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	Sep, 2021 (HCDC, H&C)	Project Phase	Closing
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Risk Level	<i>On Track</i>
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Monthly Update

During September 2021, SRC activities included the following:

Task 1: Management, Budget and Work Plan

% Task Spent to Date

- Reviewed/monitored project expenses and projections.
- Monitored subcontracts, project invoicing and payments.
- Managed production activities necessary to support Social Security form data collection.
- Final Deliverables:
 - o Delivered data to the ICPSR archive
 - ☐ Reviewed all non-PII datafiles for upload to ICPSR. Revised Wave 2 SAS datasets to eliminate PII. Prepared new Stata datasets.
 - ☐ Assembled technical documentation for Waves 1 and 2
 - ☐ Prepared zip files and uploaded non-PII data for Waves 1 and 2 to the NICHD ICPSR archive.

Task 2: Sampling

% Task Spent to Date

- Revised Wave 1 geocoding file to include Census tract, Census place, MSA and FIPS code. Posted revised file to the SFTP.

Task 3: Questionnaire Development

% Task Spent to Date

- No activity this month

Task 4: CAI Programming

% Task Spent to Date

- No activity this month.

Task 5: Systems Programming

% Task Spent to date

- No activity this month.

Tasks 6, 7: Interviewer Recruitment & Hiring, Training

% Task Spent to Date

- No activity this month

Task 8: Main Data Collection

% Task Spent to Date

- Logged and scanned incoming Social Security forms. Prepared forms for delivery.
- Mailed respondent incentives; reconciled cash/gift card funds.

Task 9: Post Collection Processing

% Task Spent to Date

- No Activity this month

Task 10: Weighting

% Task Spent to Date

- No activity this month

Task 11: Final Data Deliverables

% Task Spent to Date

- See Task 1 Management and Task 2 Sampling for activities

Areas of Concern (changes shown in italics):

Wave 2

- Assuming that SRO has the use of all awarded NICHD funds, the project is projecting an underrun estimated between \$57,000 and \$63,000 in direct costs. The exact figure depends on the response rate to our social security form data collection effort, and the level of effort necessary for archiving data at ICPSR as well as continued requests for data investigation and support from the research team. The underrun results from staffing changes at SRO brought about by the pandemic, the revised verification effort, as well as interviewer efficiency during production interviewing. There are some unknowns, such as the response rate for the administrative records forms and the level of support required for respondents for completion of the records forms. SRO will continue to update the research team on financial status.

Wave 2 Work Scope Changes:

- Notification of new specifications for State Data Consent forms received on February 9th, 2020, requiring revising and reprinting forms, developmental costs, and revised IRB submissions.
- Questionnaire Development – Budgets assumed that final clean copies of all instruments be delivered by early August 2019 to allow for review and programming specification delivery using assigned resources.
- A household screener/exit interview has been developed and will be programmed to facilitate locating children who do not live with the Wave 1 PCG. The instrument will collect contact information for new PCGs (approved by Pls).
- 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.

Special Issues

Cost

Oct 08, 2021

Total Cost to Date (Direct + Indirect): 11,958,759.86

Estimated Cost at Completion (E\$AC): 11,964,465.68

Total Budget: 12,043,058.00

Variance (Budget minus E\$AC): 78,592.32

Reason For Variance:

The projected variance is related to work scope changes due to the switch from FTF to telephone for Wave 2 (COVID-19 related scope change).

Projections

Oct 08, 2021

Dollars Projected For Month: 7,867.20

Actual Dollars Used: 8,392.93

Variance (Projected minus Actual): -525.73

Reason For Variance:

The monthly variance is due to SO R&D fees.

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	(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: 08/31/2021</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: 08/31/2021
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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: 08/31/2021														
Other Project Team Members:	Andrew Hupp, Debbie Zivan Dan Tomlin, Tony Romanowski, Daniah Buageila, Anna Fuqua-Smith, Janet McBride, Jim Rodgers, Laura Yoder, Holly Ackerman, Pam Swanson, Deb Wilson, David Bolt, Matt Hanger, Tricia Blanchard, Lloyd Hemingway, Dianne Casey, Gary Hein.														
Other Project Names:	HRS Antibody, Antibody Project														
Sample Mgmt Sys	MSMS														
Data Col Tool	Other (COVID Antibody Saliva Kit, Paper/Pencil)														
Hardware	Laptop; Desktop; [UM cell] Phone; Paper and Pencil														
DE Software	Other (MSMS)														
QC Recording Tool	N/A														
Incentive	Yes, R														
Administration	SRO Group														
Payment Type	Check, prepaid (\$20)														
Payment Method	Check through STRak RPay System														

Report Period	Sep, 2021 (HRS 2020 ABT)	Project Phase	Closing
Risk Level	On Track		

Monthly Update

All test kits were mailed out by December 20, 2020 and all reminder postcards mailed by January 7, 2021. Reminder calling was conducted through mid-March 2021. Logging and result mailings projected to continue through October 2021.

Minnesota delivered results for all but one respondent as of the end of September. Consent logging, result letter mailings, and respondent support (follow-up to calls and emails) continued through the month.

As of 9/21/21 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: 7,125 (44%)

Refusals: 1,805 (11%)

Deceased: 112 (1%)

Received Vaccine: 420 (2%)

Undeliverable - No Forwarding Address: 111 (1%)

Pending response: 6,715 (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
Oct 08, 2021

Total Cost to Date (Direct + Indirect): 911,824.30

Estimated Cost at Completion (E\$AC): 771,850.14

Total Budget: 817,809.00

Variance (Budget minus E\$AC): 45,958.86

Reason For Variance:

Cost to Date includes the cost of all checks issued for respondent incentives. We increased the percent of expected check voids in projections as the outstanding checks remain high, which is pre-reflected in the cost at completion. 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 through September. CASIC rate change from \$2.01 to \$2.50 has been applied in CRS. The Minnesota lab accepted samples through August 30, 2021 so SRO will continue a low level of activities on this project through October.

Projections
Oct 08, 2021

Dollars Projected For Month: 2,297.90

Actual Dollars Used: 2,217.22

Variance (Projected minus Actual): 80.68

Reason For Variance:

Minimal variance due to postage and duplicating.

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:	10,587	65%	
Current actual:	7,125	44%	
Estimate at Complete:	7,125	44%	
Variance:	3,462	21%	

Other Measures

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:** 980,826.66 **Indirect Budget:** 353,097.34 **Total Budget:** 1,333,924.00

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:** 4/26/2021-4/25/2022

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: [Updated 09/2021]
This project refers to two distinct releases which comprise the 2021 "Off-Year Mail Study" - (1) A Spring effort (n=~14,000, data collection running from June-September, 2021) and (2) a Fall effort (n=~6000, data collection running from October, 2021-March, 2022). Following the model of past off-year mail studies, most HRS panel respondents will be sent a paper booklet, as well as a prepaid incentive by check, and will be asked to complete the paper survey and mail back to Ann Arbor via prepaid return materials. Logging of paper booklets will take place in Ann Arbor, where booklets will be packaged and shipped to an external vendor, DataForce, for scanning and data-export. This study will follow a Dillman-like reminder sequence - initial mailing, followed by up to three reminder mailings (booklet #2, postcard, booklet #3).

An external vendor, DataForce, will handle (1) formatting, printing and mailing of the booklet (in English and Spanish); (2) sending reminder mailings to each batch of sample; and (3) scanning completed booklets and delivering data to SRO for processing and delivery.

The sample size for this project is significantly larger than other "off-year" mail studies such as LHMS. Relatedly, and also unlike past instances of HRS off-year mail studies, this project's sample is not distinct from that of HRS CAMS; all HRS CAMS participants were asked to complete the COVID Survey as part of the Spring effort.

Key differences between the Spring and Fall efforts:
(1) Distinct sample (also from among existing HRS panel)
(2) Several revisions to the questionnaire
(3) Changes to management team

SRO Project Period 03/2021 - 05/2022

Data Col Period 05/2021 - 03/2022

Security Plan NA

Milestone Dates

PreProduction Start: 03/01/2021

Pretest End:

Staffing Completed:

SS Train Start: 06/08/2021

DC Start: 05/28/2021

Pretest Start:

Recruitment Start:

GIT Start:

SS Train End: 06/08/2021

DC End: 03/31/2022

Other Project Team Members:

Technical Leads: Ian Ogden & Jim Rodgers
MSMS Developers: Pam Swanson & Jim Rodgers
Data Manager: Laura Yoder
Project Support 1: Jeannie Baker (Replacing Becky Scherr, as of late-June, 2021)
Project Support 2: Melissa Luker (Spring Only)
Project Support 3 (Locating, Spring Only): Debra Heier
Project Support 4 (RPay & Mailing-Support Only, Spring): Anna Fuqua-Smith
Project Support 5 (RPay & Mailing-Support Only, Fall): Daniah Buageila

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

Report Period	Sep, 2021 (HRS 2021 OYMS / COVID)	Project Phase	Implementing
Risk Level	<i>On Track</i>		
Monthly Update	<p>[Spring Effort - Transitioning to Initial Closeout / Closing Tasks]</p> <p>Returns from the Spring effort (n=~14,000, peak data collection from June-September) have diminished to ~10-15 per week, and it appears the response rate for that sample will settle at almost exactly 60.0%.</p> <p>Approximately 8000 of the Spring COVID respondents are now active in CAMS 2021. (We may see a small bump in COVID Survey returns following the CAMS invitation mailing.)</p> <p>[Fall - Production Launch]</p> <p>The size of the production sample has been finalized at n=5809 (n=64 cases excluded prior to mailing #1); mailout date will be Tuesday, 10/19/2021. Supply & labor issues resulted in a 1-2 week mailout delay (and tight assembly timeline for vendor) - key issues were the vendor seeing significantly longer turnaround on paper products (e.g. envelopes, printed SAQs) due to issues in their supply chain.</p> <p>[From 08/2021 update] Considering whether to (a) implement return-tracking on "A" mailing and/or (b) replace costly and labor-intensive USPS Priority envelopes with a standard envelope with a modified design for the final reminder mailing (i.e. can we replicate the "motivating factor" of a USPS Priority envelope without the cost / logistical implications of a "faster" mail service from which we don't benefit?)</p> <p>[Fall - Staffing & Support]</p> <p>Due to demands on Ian's time, he will be reducing his involvement in the Fall effort by at least half, hopefully handing off significant responsibility to (a) Jeannie Baker and (b) as-yet-identified support resources from the SSL. We are working closely with Lloyd and the SSL to secure sufficient ST resources for both day-to-day logging and day-to-day PM Team support (e.g. exceptions processing); however, ST availability is very, very limited. The resource constraints reflect a significant potential risk which we will be monitoring closely. Some (ultimately minor - see "Technical Systems" update) efficiencies were found, and indeed the sample size is less than 50% that of Spring. We hope these will help us make do with the resources available, but are actively engaging SSL leadership to emphasize our needs.</p> <p>[Fall - Technical Systems]</p> <p>With limited staffing in mind (and inefficiencies in some processing tasks from Spring), three low-effort, high-impact technical and procedural revisions were presented to the technical team for implementation. Unfortunately, the MSMS developer was pulled onto other tasks and was able to implement only one of these. We hope to find a few hours to implement these other changes, which will significantly speed up a key task-area (Locating).</p> <p>[Data-Out - Production & Operational]</p> <p>Delivery of data from Spring SAQs is effectively caught up; we're working to finalize the schema for the Fall Survey.</p>		
Special Issues	<p>(1) In the face of potentially significant staff-resource constraints (management and day-to-day operations), ensuring we maintain the same level of processing throughput, quality and attention to case-level issues we did in for the Spring effort;</p> <p>(2) (Fall Only) Coordinating with HRS 2021 CAMS - (a) information exchange (as CAMS sample was included in the Spring effort); and (b) procedural coordination (two, concurrent, high-volume mail studies using two separate systems).</p>		

Cost
Oct 14, 2021

Total Cost to Date (Direct + Indirect): 1,106,639.37
Estimated Cost at Completion (E\$AC): 1,298,293.17
Total Budget: 1,333,924.00
Variance (Budget minus E\$AC): 35,630.83
Reason For Variance:

[Reminder] The Spring and Fall HRS COVID Survey / OYMS efforts are under the same P/G and costs are tracked jointly; however, the two efforts have distinct sets of shortcodes, so "effort"-level cost monitoring is possible where needed.

We are currently projecting a \$35K underrun. Primary drivers are: (1) Lower-than-expected RR from the Spring effort (which may be the case for the Fall effort as well); (2) Significantly fewer full-time staff (inc. management & day-to-day operations) being available into the fall, and Survey Tech resources are also very limited; additional hours and/or hiring of temporary staff may be needed.

Projections
Oct 14, 2021

Dollars Projected For Month: 269,914.14
Actual Dollars Used: 269,836.91
Variance (Projected minus Actual): -77.23
Reason For Variance:

Costs for the month came in on-track (though some line-items were off from their projections). September, 2021 (in decreasing order of impact): (1) Respondents/Subjects costs were ~\$32K higher than projected (due to the eventual void-rate being incorporated into the initial R/S projections, rather than voids hitting near the end of the project); (2) Serv-of-Others (DataForce): Original projections assumed an earlier mailout date and more DataForce costs hitting in the month of September. Unused Serv-of-Other costs have been pushed forward.

Measures

	Units Complete	RR	HPI
Current Goal:	11,200	80.0%	N/A
Goal at Completion:			
Current actual:	8,264	59.8%	
Estimate at Complete:			
Variance:			

Other Measures

Project Name	(HRS 2022 Panel) Health and Retirement Study 2022																								
Project Mode	Primary: Mixed		Total of Modes: 3																						
Project Type	Sponsored Projects		Project Status	Current																					
Budget	Direct Budget:	12,138,521.00	Indirect Budget:	4,369,869.00	Total Budget: 16,508,390.00																				
Principal Investigator/Client	David Weir (ISR-SRC)																								
Funding Agency																									
IRB	HUM#:	HUM000611128	Period Of Approval:	9/8/2021 to 9/7/2022																					
Project Team	Project Lead:	Evanthia Leissou																							
	Budget Analyst:	Richard Warren Krause																							
	Production Manager:	Andrea Pierce																							
	Senior Project Advisor:	Nicole G Kirgis																							
	Production Manager:	Deborah Zivan																							
	Production Manager:	Jennifer C Arrieta																							
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	01/2021 - 05/2023																								
Data Col Period	04/2024 - 03/2023																								
Security Plan	NA																								
Milestone Dates	<table><tr><td>PreProduction Start:</td><td>01/01/2021</td><td>Pretest Start:</td><td>10/21/2021</td></tr><tr><td>Pretest End:</td><td>11/19/2021</td><td>Recruitment Start:</td><td>08/01/2021</td></tr><tr><td>Staffing Completed:</td><td>01/15/2022</td><td>GIT Start:</td><td>02/21/2021</td></tr><tr><td>SS Train Start:</td><td>02/21/2022</td><td>SS Train End:</td><td>03/02/2022</td></tr><tr><td>DC Start:</td><td>03/07/2022</td><td>DC End:</td><td>06/30/2022</td></tr></table>					PreProduction Start:	01/01/2021	Pretest Start:	10/21/2021	Pretest End:	11/19/2021	Recruitment Start:	08/01/2021	Staffing Completed:	01/15/2022	GIT Start:	02/21/2021	SS Train Start:	02/21/2022	SS Train End:	03/02/2022	DC Start:	03/07/2022	DC End:	06/30/2022
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SS Train Start:	02/21/2022	SS Train End:	03/02/2022																						
DC Start:	03/07/2022	DC End:	06/30/2022																						
Other Project Team Members:	Derek Dubuque (Production Manager), Andrew Hupp Project Manager), Dan Tomlin (Project Manager), Gary Hein (Project Manager),Michelle Smith (Training Coordinator), Maureen O' Brien (Training Coordinator), Daniah Buageila (Lead Project Assistant), Anna Fuqua-Smith (Project Assistant), Janet McBride (Project Assistant), Paul Burton (Stats/Sampling), Debra Heier (Project Assistant), Jeannie Baker (Project Assistant), Melissa Luker (Project Assistant), Anthony Romanowski (Project Manager)																								
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)																								
Payment Method	Check through STrak RPay System; Check through other system (Rpay system set up for MSMS); Interviewer p																								
Report Period	Sep, 2021 (HRS 2022 Panel)		Project Phase	Planning																					
Risk Level	On Track																								
Monthly Update	During the month of September, the team focused on technical development (instrument and sample management system programming and testing), pretest training logistics and presentations, preparing interviewer materials for pretest training, pretest interviewer bulk supplies, the MSMS operational review, staffing, cost projections, and finalizing recruitment incentive scenarios. HRS 2022 Pretest training and data collection is planned for late October																								

2021 (web screener 10/21 and interviewer administered screening and interviewing 11/1). Main training is scheduled for February 2022 with data collection starting March 7, 2022.

Special Issues

Proof of vaccination status was reviewed for pretest interviewers. Protocols were developed for COVID screening of interviewers and respondents (and other household members) for FTF interviewing. COVID safety presentation was developed for interviewer training. PPE required for COVID safe interviewing was researched.

Cost Oct 12, 2021

Total Cost to Date (Direct + Indirect): 448,269.92

Estimated Cost at Completion (E\$AC): 16,402,266.49

Total Budget: 16,508,390.00

Variance (Budget minus E\$AC): 106,123.51

Reason For Variance:

We are projecting an underrun at the salary level as a result of staff assignments vs budgeted categories. Salary underrun is offset by overrun in the non-salary category. CRS is now projecting the contingent fringe benefits with the newly approved 10.4% rate to accommodate ACA costs, the \$400 signing bonus for field staff, and the SurveyTech base rate increase.

Projections Oct 12, 2021

Dollars Projected For Month: 316,171.94

Actual Dollars Used: 252,870.04

Variance (Projected minus Actual): 63,301.90

Reason For Variance:

Panel hours were 831 under projections (salary \$45,681) under in September. Projections have been adjusted for future months.

Measures

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

Other Measures

Project Name	(HRS2022-NewCohort) HRS 2022 - New Cohort												
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 2										
Project Type	Sponsored Projects	Project Status	Current										
Budget	Direct Budget: 17,851,365.00	Indirect Budget: 6,426,491.00	Total Budget: 24,277,856.00										
Principal Investigator/Client	David Weir (SRC) Helen Levy (SRC) Ken Langa (SRC)												
Funding Agency													
IRB	HUM#:	Period Of Approval:											
Project Team	Project Lead:	Evanthia Leissou											
	Budget Analyst:	Richard Warren Krause											
	Production Manager:												
	Senior Project Advisor:	Nicole G Kirgis											
	Production Manager:	Andrew L Hupp											
	Production Manager:												
Proposal #:	no data												
Description:	<p>The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample.</p>												
SRO Project Period	02/2021 - 01/2024												
Data Col Period	03/2022 - 01/2024												
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start:</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:</td> <td style="padding: 5px;">SS Train End:</td> </tr> <tr> <td style="padding: 5px;">DC Start:</td> <td style="padding: 5px;">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:													
Other Project Names:													
Sample Mgmt Sys	SurveyTrak; Other ((Blaise) Case Management App (CMA))												
Data Col Tool	Blaise 5												
Hardware	Laptop; [UM cell] Phone; Paper and Pencil												
DE Software	N/A												
QC Recording Tool	Camtasia; N/A												
Incentive	Yes, R; Yes, INF												
Administration	SRO Group												
Payment Type	Check, post; Cash, post												
Payment Method	Check through STRak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest C												

Report Period	Sep, 2021 (HRS2022-NewCohort)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	<p>Sampling/Listing: Address sorting continued in September. The team finished with the 98 high priority segments in late September identifying 37 segments to be listed. Sorting the 806 non-priority segments started in September and is expected to be completed by mid December. Starting in mid-October, twenty seven field staff to work on listing the 37 segments. Lister training is scheduled for October 16.</p> <p>[Background on segment types: High priority segments (98) and low priority segments (806). The high priority</p>		

segments are those that we may need to list. They are either currently below the minimum measure of size (75) or were in the top 10% of the difference between the Census total and the number of addresses MSG provided.]

IRB: IRB approval received on September 16 for pretest protocols and respondent material.

Pretest: For the pretest we are planning a mode experiment, aiming to identify best ways to reach household members to complete the screener. The experiment design is described on the attached document (2022_PretestDesign_NC.docx). A total of 1500 addresses will be screened to identify eligible respondents for either the EGenX cohort or the Older HRS Cohort Refresher. The goal of the pretest is to complete 100 baseline interviews.

HRS staff prepared and delivered preload for the pretest screener sample. All screening sample will be assigned to eFTF (Face to Face Enhanced) mode. This will allow us to identify issues when requesting in person visits for the interview, and physical measurements and bio-markers (PM-Bio). In addition, the main questionnaire has several modifications in the PM-Bio section and the pretest data collection will help identify edits.

During September, progress was made in programming the screener questionnaire. We are planning to test and be ready to launch the Web self-administered version, in late October, a few days ahead of November 1, when interviewers will start screening addresses. Andrew H wrote a basic rule set for MSMS to manage access to the survey. Andrew is working with Karl and Marsha on a mechanism to get the data from Blaise to SurveyTrak. The plan is to use SurveyTrak to create the mail sample lines and for reporting.

The pretest mode experiment also includes specifications for prepaid or promised incentive; we will either prepay \$2 in cash, included with the invitation letter, or promise \$2, which will be paid via a gift code, sent via email/text with the code, once the screener has been completed. In September, we met with a Tango representative to discuss account set up and management of electronic payments. An impress cash fund was set up for the prepaid cash incentives.

Special Issues

Cost

Oct 12, 2021

Total Cost to Date (Direct + Indirect):	611,918.60
Estimated Cost at Completion (E\$AC):	23,734,341.17
Total Budget:	24,277,856.00
Variance (Budget minus E\$AC):	543,514.83
Reason For Variance:	Projections will be refined as we go. There are a lot of moving pieces and some unknowns at the moment.

Projections

Oct 12, 2021

Dollars Projected For Month:	352,107.75
Actual Dollars Used:	142,736.58
Variance (Projected minus Actual):	209,371.17
Reason For Variance:	Projections are still being refined. The monthly variance was because of salaries that were mostly pushed forward.

Measures

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

Other Measures

Project Name	(MARS 2) Malaysia Ageing and Retirement Study Wave 2				
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 2		
Project Type	Sponsored Projects	Project Status	Current		
Budget	Direct Budget: 187,281.00	Indirect Budget: 67,421.00	Total Budget: 254,702.00		
Principal Investigator/Client	David Weir (UM SRC - HRS)				
Funding Agency	Health and Retirement Study				
IRB	HUM#: NA	Period Of Approval:			
Project Team	Project Lead: Margaret Lee Hudson Budget Analyst: Richard Warren Krause Production Manager: Senior Project Advisor: Evanthia Leissou Production Manager: Kasyera Kowalczyk Production Manager:				
Proposal #:	no data				
Description:	<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; padding: 5px;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="text-align: center; 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:	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 Sep, 2021 (MARS 2) **Project Phase** Implementing

Risk Level Some Concerns

Monthly Update In September our partners at SWRC were recruiting and hiring new interviewers and preparing for another interviewer training in hopes of resuming widespread data collection in October as COVID cases in Malaysia decline and vaccination rates increase. We have worked on updating projections in order to extend data collection through March 2022, with a firm end date.

At SRO, Jay Lin has been working with the team to prepare for his departure from SRO in late October 2021. Transition planning and documentation have been continuing.

Special Issues Data collection is expected to resume in October provided COVID infections continue to become under control in Malaysia and the government and university allow resumption of data collection in person.

Cost
Oct 17, 2021

Total Cost to Date (Direct + Indirect):	214,623.06
Estimated Cost at Completion (E\$AC):	239,269.64
Total Budget:	254,702.00
Variance (Budget minus E\$AC):	15,432.36
Reason For Variance:	Original savings due to cancellation of international travel.

Projections
Oct 17, 2021

Dollars Projected For Month:	6,035.31
Actual Dollars Used:	4,734.92
Variance (Projected minus Actual):	1,300.39
Reason For Variance:	Fewer HelpDesk hours required/charged.

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

Other Measures

Project Name	(MI CReSS) Michigan COVID-19 Recovery Surveillance Cohort Study														
Project Mode	Primary: Web		Secondary: Telephone		Total of Modes: 2										
Project Type	Sponsored Projects			Project Status	Current										
Budget	Direct Budget:	530,543.00	Indirect Budget:	137,941.00	Total Budget: 668,484.00										
Principal Investigator/Client															
Funding Agency															
IRB	HUM#:	Period Of Approval:													
Project Team	Project Lead:	Terri Ann Ridenour													
	Budget Analyst:	Parina Kamdar													
	Production Manager:	Ruth B Philippou													
	Senior Project Advisor:	Nicole G Kirgis													
	Production Manager:														
	Production Manager:														
Proposal #:	no data														
Description:	<p>MI CReSS is a partnership between the University of Michigan School of Public Health (SPH) and the Michigan Department of Health and Human Services. It is a public health surveillance study to learn about Michiganders' experiences with COVID-19 using a representative sample of confirmed cases within the state. Using survey data, they plan to document sociodemographic inequities in COVID-19 testing, treatment, and recovery.</p> <p>SRO's involvement includes the administration of a Follow-up survey for respondents that completed a Baseline survey with the SPH team. Based on the sample information provided, we will be re-contacting approximately 3,995 respondents who have already completed (or are estimated) to complete the Baseline survey to administer the Follow-up survey.</p> <p>The Follow-up survey is estimated to be 45 minutes in length, and Respondents will be encouraged to complete the survey by web. However, SRO Interviewers will contact non-responders and conduct the interview over the telephone if the Respondents do not want to complete the survey on the web.</p>														
SRO Project Period	08/2021 - 09/2023														
Data Col Period	12/2021 - 06/2023														
Security Plan	NA														
Milestone Dates	<table><tr><td>PreProduction Start:</td><td>Pretest Start:</td></tr><tr><td>Pretest End:</td><td>Recruitment Start: 09/16/2021</td></tr><tr><td>Staffing Completed:</td><td>GIT Start:</td></tr><tr><td>SS Train Start: 11/29/2021</td><td>SS Train End: 11/29/2021</td></tr><tr><td>DC Start: 12/13/2021</td><td>DC End:</td></tr></table>					PreProduction Start:	Pretest Start:	Pretest End:	Recruitment Start: 09/16/2021	Staffing Completed:	GIT Start:	SS Train Start: 11/29/2021	SS Train End: 11/29/2021	DC Start: 12/13/2021	DC End:
PreProduction Start:	Pretest Start:														
Pretest End:	Recruitment Start: 09/16/2021														
Staffing Completed:	GIT Start:														
SS Train Start: 11/29/2021	SS Train End: 11/29/2021														
DC Start: 12/13/2021	DC End:														
Other Project Team Members:	<p>Project / Production Assistant: Jason English</p> <p>Parina Kamdar: Financial Analyst</p> <p>Hueichun Peng: Technical Lead / WSMS db Programmer</p> <p>Peter Sparks: CAI Programmer (Blaise 5)</p> <p>Cheng Zhou: Web Component, ADT, Reports</p> <p>LihShwu Ke: DBA Architecture & Data Security</p> <p>Sarah Broumand: Data Manager</p> <p>Gina Cheung: Technical Consultant</p> <p>Deb Wilson: Help Desk</p>														

Other Project**Names:**

Sample Mgmt Sys Web SMS
Data Col Tool Blaise 5
Hardware Laptop; Desktop
DE Software NA
QC Recording Tool NA
Incentive Yes, R
Administration SRO Group
Payment Type Check, post (\$25)
Payment Method NA

Report Period	Sep, 2021 (MI CReSS)	Project Phase	Initiation
Risk Level	Some Concerns		
Monthly Update	Our team members have settled into their project assignments and we continue to work on pre-production goals. We hold weekly meetings with the client, tech team meetings and project meetings to develop protocols and training materials. We are all working to fast track the pre-production/development timeline as much as possible.		
Special Issues	<p>Last month we consulted with CCP staff about the MI CReSS project's crisis protocol that was established for their Baseline interview. We also met the PI and MDHHS representative to discuss the mandated reporting requirements and expectations for SRO's scope of work (MI CReSS Follow up Survey),. The client agreed that our existing CCP Protocol infrastructure (Respondent and Interviewer Support Protocol) will replace what the client refers to as their "Crisis Protocol" used at recruitment / Baseline survey.</p> <p>This week we have a follow up meeting with the client and MDHHS sponsor, to follow up on our discussion about mandated reporting. Barb Ward has reviewed the MI CReSS documentation and will join this meeting, on behalf of the SRO Mandated Reporting team. We will discuss how our (SRO) obligations for Mandated Reporting compare to the clients -- and determine requirements going forward.</p> <p>Here are Barb Ward's questions / comments that were sent in advance of the meeting:</p> <p>--Who is considered part of the "leadership team" referenced in the document. Is that the research team?</p> <p>--This would only fall under the SRO Mandated Reporting protocol if we found elder abuse, child abuse, abuse of an adult disabled or pregnant woman, or abuse of a person who was confined to a nursing home (in general, any vulnerable person). Is the study interviewing nursing home residents (it sounds like yes?) What about prisoners?</p> <p>--A complaint about a doctor's office or doctor's treatment program for COVID19 would not fall under the mandated reporting protocol either, unless it falls under the Michigan law for abuse, neglect, exploitation of a vulnerable person (elder, child, pregnant woman, disabled adult).</p> <p>--Generally the reports we (SRO) handle identify a specific person at risk. An employee making allegations about an employer (even if that employer is a long-term care facility) would not fall under our mandated reporting protocol. Similarly, some of the items classified as "patient mistreatment" may not fall into the classification of abuse or neglect of a vulnerable person. That doesn't mean that we don't have an ethical duty to report those comments, and I'm glad the study has a protocol to handle them.</p>		
Cost			
Oct 08, 2021	Total Cost to Date (Direct + Indirect):	18,622.29	
	Estimated Cost at Completion (E\$AC):	660,162.02	
	Total Budget:	668,484.00	
	Variance (Budget minus E\$AC):	8,321.98	
	Reason For Variance:	We continue to update our projections based on project needs and resource availability.	
Projections			
Oct 08, 2021	Dollars Projected For Month:	15,359.38	
	Actual Dollars Used:	14,189.55	
	Variance (Projected minus Actual):	1,169.83	
	Reason For Variance:	Parina just added the projections to CRS 9/20/21.	

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 (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 Sep, 2021 (MTF base year 2017-2022) **Project Phase** Planning

Risk Level *On Track*

Monthly Update September updates

- Continued with pre production tasks for the Base Year 2022 (Training, technical system updates).
- In addition, a small team continues to work on a back-up solution for the small (if any) number of schools that do not have an internet connection. We have made the decision that this will be a portable server (other options considered are satellite internet, hotspots). I have uploaded (to MPR) the summary document that I created for Richard (PI) - he was pleased with the plan and approved the additional cost .

Special Issues

Cost

Oct 08, 2021	Total Cost to Date (Direct + Indirect):	5,806,285.62
	Estimated Cost at Completion (E\$AC):	6,852,287.29
	Total Budget:	7,316,931.00
	Variance (Budget minus E\$AC):	464,643.71

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
Oct 08, 2021

Dollars Projected For Month:

65,193.86

Actual Dollars Used:

29,831.01

Variance (Projected minus Actual):

35,362.85

Reason For Variance:

Source of variance is due to hardware costs (associated with the 'back-up' solution) being charged in October rather than September.

Measures

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

Other Measures

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 Sep, 2021 (MTF Panel (main data colle **Project Phase** Implementing

Risk Level On Track

Monthly Update Data manager: Continue to monitor progress on data collection effort

Production Data: as of 09/30/2021

Total Sample: 21589

Total completes: 9301

Response Rate: 43.08%

Special Issues

Cost
Sep 30, 2021

Total Cost to Date (Direct + Indirect):	1,027,693.31
Estimated Cost at Completion (E\$AC):	1,117,127.46
Total Budget:	1,135,001.00
Variance (Budget minus E\$AC):	17,873.54
Reason For Variance:	The amount of underrun will be adjusted in October.

Projections
Sep 30, 2021

Dollars Projected For Month:	33,882.61
Actual Dollars Used:	41,617.20
Variance (Projected minus Actual):	-7,734.59
Reason For Variance:	The amount of overrun will be adjusted in October.

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

Other Measures

Project Name (PSID TAS 2021) Transition to Adulthood within its Life Course & Intergenerational Family Context

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

Project Type Sponsored Projects **Project Status** Current

Budget **Direct Budget:** 832,984.00 **Indirect Budget:** 466,471.00 **Total Budget:** 1,299,455.00

Principal Investigator/Client Narayan Sastry (U-M PSC SRC)

Funding Agency NIH

IRB **HUM#:** HUM00112629 **Period Of Approval:** 7/14/2021 - 7/13/202

Project Team **Project Lead:** Piotr Dworak
Budget Analyst: Megan Gomez-Mesquita
Production Manager: Elizabeth Ohryn
Senior Project Advisor: Stephanie A Chardoul
Production Manager: Daric Thorne
Production Manager:

Proposal #: no data

Description: TAS 2021 is the 9th Wave of TAS study, part of the PSID Suite of projects.

Approximately 3,000 youth aged 18 – 28 years who are part of families who participate in the ongoing Panel Study of Income Dynamics (PSID) are invited to take part in a 60-minute web survey. In 2021, all respondents go through the same sequential treatment - non-responders to web survey are called as part of the non-response follow up. Respondents will be offered a up to \$100 for completing the interview which includes a \$75 base payment and possible other interventions. Phone interviews will be completed by a mix of Field and Survey Research Center Survey Services Lab (SSL) interviewers.

SRO Project Period 06/2021 - 07/2022

Data Col Period 09/2021 - 06/2022

Security Plan NA

Milestone Dates

PreProduction Start: 05/01/2021	Pretest Start: 05/01/2021
Pretest End: 08/01/2021	Recruitment Start: 08/30/2021
Staffing Completed: 09/07/2021	GIT Start: 09/15/2021
SS Train Start: 09/30/2021	SS Train End: 10/01/2021
DC Start: 09/30/2021	DC End: 06/18/2021

Other Project

Team Members:

Other Project

Names:

Sample Mgmt Sys MSMS

Data Col Tool Blaise 4.8; Blaise 5

Hardware Laptop; Desktop; [UM cell] Phone

DE Software NA

QC Recording Tool DRI-CARI

Incentive Yes, R; Yes, INF

Administration SRO Group

Payment Type Check, post (75); Other (ePay)

Payment Method Check through other system (PSID RAPS); Other (ePay)

Report Period Sep, 2021 (PSID TAS 2021) **Project Phase** Implementing

Risk Level On Track

Monthly Update TAS is in week 3 of production. In Week 3 192 respondents completed the web survey exceeding the goal of 106 by 86 completes. Cumulatively, week 1 through 3 produced 606 completes exceeding the cumulative goal of 498 by 108 completes. Cumulative completion rate for Release 1 after Week 3 is 42.4% and is ~5pp higher compared to 2019 Release 1 which achieved 37.1% after week 3 (11/24 - 12/1/2019). About half (2.5pp) of the difference might be attributed to the 36 cases who provided cell phone and/or email during the Early Locating outreach and by now

completed the survey -- Early Locating was a new feature of 2021. In 2021, we are also quicker to work with Rs whose survey was locked due to wrong name/age.

At this point, respondents are primarily contacted via email and text messages and sent reminders to complete the web survey. Interviewers are using QR codes to send text messages. There were no CATI completes in week 3. Interviewers started reaching out to some respondents who called in with questions or issues logging in to the survey. As of 10/18 (Monday), we also started assigning cases with no phone numbers (n = 106) to interviewers to start distributed vs. pooled sample work.

Looking ahead, non-responders will receive a web special offer of \$10 and \$20 to complete by Sunday 11/14. We will start the non-response follow up phase on Monday 11/15.

Special Issues

Cost

Oct 17, 2021

Total Cost to Date (Direct + Indirect): 241,958.67
Estimated Cost at Completion (E\$AC): 1,338,344.41
Total Budget: 1,299,455.00
Variance (Budget minus E\$AC): -38,889.56
Reason For Variance: Adjustments to interviewer pay rates.

Projections

Oct 17, 2021

Dollars Projected For Month: 101,190.12
Actual Dollars Used: 89,695.42
Variance (Projected minus Actual): 11,494.70
Reason For Variance: Savings across different roles (mostly TSG)

Measures

	Units Complete	RR	HPI
Current Goal:	498	36%	n/a
Goal at Completion:	2332	88%	n/a
Current actual:	606	44%	n/a
Estimate at Complete:	2332	88%	n/a
Variance:			

Other Measures

Project Name (PSID21) Panel Study of Income Dynamics 2021

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

Project Type Sponsored Projects **Project Status** Current

Budget **Direct Budget:** 4,447,019.00 **Indirect Budget:** 2,440,404.00 **Total Budget:** 6,887,423.00

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	Sep, 2021 (PSID21)	Project Phase	Implementing
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Risk Level	<i>Some Concerns</i>
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Monthly Update	Below is the Production variance to goals for all weeks in September. We missed goal in 3 of the 5 weeks but significantly exceeded it in Wk 28 when the Summer Offer concluded and we offered Web to additional lines.
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WK

25 8/29/2021 - 9/4/2021 -21

26 9/5/2021 - 9/11/2021 1

27 9/12/2021 - 9/18/2021 -1

28 9/19/2021 - 9/25/2021 83

29 9/26/2021 - 10/2/2021 -28

Phase 1 of the hours-based iwer bonus plan is underway.

Interventions in September included:

Wk

25 First Split-off letters mailed on 8/31

28 Offer Web to English CATI First Lines: 9/23 - 10/4, Pause work on non-Imm Recons: 9/23

29 Terminal Bird Rep 1: 9/29 - 10/20, Ring Fence invited to web: 9/29

Work is underway to plan for TB Replicates 2 and 3 assuming Rep 1 is found to be successful. To-date the experimental group's RR is >4x that of the control group's and it seems likely that by the 10/20 conclusion it will be high enough to justify ceasing further contact on NR lines (as promised).

TAS Training took place 9/29 - 10/1. 7 Core iwers will be shared with TAS.

Technical work in September included:

--Template and rules work related to TB Rep 1.

--Troubleshooting related to first Splitoffs.

--A rules correction to help us move lines out of review states without the system timing out.

--On-going TSG and PDMG staff work on the long list of lines with technical issues requiring resolution (including use of the new ADT to BDBx utility to reconstruct iws).

--FPS Data Reconstruction: As of 9/15 SRO delivered everything promised related to the reconstruction, including Kevin's spreadsheet of vars displayed on the same page in Web iw (to be used by Mushtaq to refine the reconstructed data). Per Mushtaq's request we subsequently gave his direct access to the parsed ADT data.

--Implemented MSMS data scooping for security and to address issues with the speed of iwer syncs.

As of 10/5 the project decided not to transition to SQL Server. This decision was made at the recommendation of the Blaise Admins, with TSG Admin and SRO Project Leadership and will be shared with PSID PIs/Staff as needed. Testing resources, especially DM resources were a key factor.

The list of Technical issues affecting iwers' work has not changed from last month.

Special Issues

**Cost
Sep 30, 2021**

Total Cost to Date (Direct + Indirect): 5,142,839.57
Estimated Cost at Completion (E\$AC): 7,374,533.41
Total Budget: 6,887,423.00
Variance (Budget minus E\$AC): -487,110.41
Reason For Variance:

Our current projected direct cost overrun increased by \$81K from last month, up to \$303K. The huge majority of this increase is due to the interviewer rate increase (\$63,519), but we also had small increases for staff during project close out, including DMSS and data management.

**Projections
Sep 30, 2021**

Dollars Projected For Month: 564,058.90
Actual Dollars Used: 537,372.17
Variance (Projected minus Actual): 26,686.73
Reason For Variance:

In September, we projected to spend \$361K direct cost, and actually spent \$347K, for a monthly direct cost underrun of \$14K. This underrun was mainly due to field interviewer underruns, largely because of CRS projected interviewer rates being updated earlier than their effective dates.

Measures

	Units Complete	RR	HPI
Current Goal:	7402	69.7%	7.1
Goal at Completion:	9694	84%	7.5
Current actual:	7397	69.7%	7.1
Estimate at Complete:	9694	83.5%	7.8
Variance:	0	0	.3

Other Measures

All Measures are reported through the last completed week (through 10/16). Our goals are reassessed each week, with variance in weekly performance leading to updates to future weeks. Rachel or Shonda can share assessments of current production to original goals upon request.

Note: Per a 8/18 PI meeting decision, we lowered the overall target yield and RR, and raised the target HPI. These targets are still optimistic.

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 Sep, 2021 (SCA 2021) **Project Phase** Initiation

Risk Level On Track

Monthly Update SCA SEPT began as scheduled on WED 8/25 and ended as scheduled on MON 09/27. We completed 612 IWs (325/184/103), 12 IWs above our goal of 600 (320/180/100). The current cost reports reflect the increase in ST salary effective 10/3/21, thru the end of the data collection year.

Special Issues**Cost**

Oct 08, 2021

Total Cost to Date (Direct + Indirect): 827,195.47
Estimated Cost at Completion (E\$AC): 1,127,337.85
Total Budget: 1,122,582.00
Variance (Budget minus E\$AC): -4,755.85
Reason For Variance: ST salary increases effective 10/3/2021

Projections

Oct 08, 2021

Dollars Projected For Month: 94,983.58
Actual Dollars Used: 89,553.96
Variance (Projected minus Actual): 5,429.62
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>	612		2.99
<i>Estimate at Complete:</i>	612		2.99
<i>Variance:</i>	+12		-.01

Other Measures

Project Name	(SCIP 2021) Sustainability Culture Indicators Project												
Project Mode	Primary: Not Available												
Project Type	Sponsored Projects	Project Status	Current										
Budget	Direct Budget: 136,813.00	Indirect Budget: 0.00	Total Budget: 136,813.00										
Principal Investigator/Client	John Callewaert, PI (SRC, Graham Sustainability Institute) Robert Marans, Co-PI (SRC) Noah Webster, Co-PI (SRC)												
Funding Agency													
IRB	HUM#: HUM00204955	Period Of Approval:	9/2021-9/2026										
Project Team	Project Lead: Maureen Joan O'Brien Budget Analyst: Carl S Remmert Production Manager: Senior Project Advisor: Andrew L Hupp Production Manager: Production Manager:												
Proposal #:	no data												
Description:	The overall goal Sustainability Cultural Indicators Project (SCIP), a joint project of the Institute for Social Research (ISR) and the Graham Environmental Sustainability Institute (Graham), is to measure changes in sustainability and carbon-neutrality related knowledge, commitments, and practices in the University of Michigan (U-M) community over time. The principle component of SCIP is a large-scale annual survey, to be conducted with U-M students, faculty, and staff from all U-M Campuses: Ann Arbor, Flint, and Dearborn.												
SRO Project Period	09/2021 - 09/2026												
Data Col Period	10/2021 - 12/2021												
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start: 08/15/2021</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:</td> <td style="padding: 5px;">SS Train End:</td> </tr> <tr> <td style="padding: 5px;">DC Start: 10/13/2021</td> <td style="padding: 5px;">DC End: 12/15/2021</td> </tr> </table>			PreProduction Start: 08/15/2021	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start: 10/13/2021	DC End: 12/15/2021
PreProduction Start: 08/15/2021	Pretest Start:												
Pretest End:	Recruitment Start:												
Staffing Completed:	GIT Start:												
SS Train Start:	SS Train End:												
DC Start: 10/13/2021	DC End: 12/15/2021												
Other Project Team Members:	Maureen O'Brien - Project Lead, application programming, sample loading, questionnaire distribution Minako Edgar - Sample prep, data management, data delivery, GIS analysis Raphael Nishimura - Weighting Carl Remmert - budget support analyses												
Other Project Names:													
Sample Mgmt Sys	Project specific system (Qualtrics)												
Data Col Tool	Other (Qualtrics)												
Hardware	NA												
DE Software	N/A												
QC Recording Tool	N/A												
Incentive	Yes, R												
Administration	NA												
Payment Type	Other (Amazon)												
Payment Method	Other (via Email)												

Report Period	Sep, 2021 (SCIP 2021)	Project Phase	Initiation
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Risk Level	On Track
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Monthly Update	Qualtrics programming was finalized this month. Student, Faculty, and Staff sample files were requested from the three U-M Campuses – Flint, Dearborn, and Ann Arbor. Dearborn and Ann Arbor provided sample seamlessly, while it took finessing for Flint to agree to provide the sample, even though the Chancellor has stated the campus is on board. The Chancellors sent pre-invitation emails to the full campus on 10/8 and 10/13. We have worked with Flint staff to provide it, and they are currently working on the sample files. Data collection launched on 10/13 for Ann Arbor, earlier than planned, due to another campus-wide surveys occurring in late October. Dearborn will launch on
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10/21 and Flint will launch as soon as we receive sample. So far with less than a week since release, the RR is already 14% for Ann Arbor with an overall 27% RR goal. We will begin sending reminder emails soon.

Special Issues

No issues at this time to report.

Cost

Oct 18, 2021

Total Cost to Date (Direct + Indirect): 4,326.26

Estimated Cost at Completion (E\$AC): 85,896.88

Total Budget: 136,813.00

Variance (Budget minus E\$AC): 50,916.12

Reason For Variance: Project was over-funded, small number of staff on project who are not able to charge all hours.

Projections

Oct 18, 2021

Dollars Projected For Month: 11,047.96

Actual Dollars Used: 4,326.26

Variance (Projected minus Actual): 6,721.70

Reason For Variance: Small number of staff on project who are not able to charge all hours.

Measures

	Units Complete	RR	HPI
Current Goal:	4,761	27%	
Goal at Completion:	6,207		
Current actual:	3,117	14%	
Estimate at Complete:	6,207		
Variance:			

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: 12,809,390.00										
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	STARRS-LS Continuation
Names:	
Sample Mgmt Sys	MSMS
Data Col Tool	Blaise 5
Hardware	Laptop; Desktop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	Other (Blaise CARI)
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post (\$50-\$100)
Payment Method	Check through other system (MSMS)

Report Period	Sep, 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 seven replicates (7,380 sample lines) and completed 5,513 interviews as of October 1. <input type="checkbox"/> We continued bi-weekly meetings with the ODUSA to coordinate Safety Plan and respondent locating activities. <input type="checkbox"/> The Year 1 subaward closeout report and final invoice were sent to HJF. <input type="checkbox"/> The analysis of the areas in our budget where spending is more than anticipated was completed and sent to the PIs. <input type="checkbox"/> James and Meredith attended the September 14 GSC meeting. We awaited the due-outs from the meeting. We expect the following (among other items) will be discussed: <ul style="list-style-type: none"> <input type="checkbox"/> U-M will rebudget Wave 4 for 18 months instead of 24. <input type="checkbox"/> U-M will budget for W4 Public Use (ICPSR). This is new scope/not in the current budget. <input type="checkbox"/> U-M will pursue 157 SHOS-A Cases as part of the LS sample. This is also new scope/not in the current budget. <input type="checkbox"/> The production team held multiple meetings to discuss procedures for recruitment of SHOS-A cases. <input type="checkbox"/> IRB: <ul style="list-style-type: none"> <input type="checkbox"/> We received USUHS concurrence for a STARRS-LS Continuation amendment. <input type="checkbox"/> We completed work on the privacy notice which will be submitted to the IRB next month. <input type="checkbox"/> The September quarterly Enclave user review was completed. <input type="checkbox"/> The Enclave team worked on renewals for several software packages and toward server hardware replacement for the Enclave Windows infrastructure. <input type="checkbox"/> We continued work on biomarker group requests for assistance, including transferring PPDS-T1 data and metadata to Great Lakes Cluster. <input type="checkbox"/> A request for a budget for adding the Wave 4 data to public use holdings was sent to ICPSR.
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Special Issues

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

- ORIO monitoring:
 - o In Wave 3, we experienced an increase in frequency of ORIO reports for protocol deviations or respondent complaints related to the Safety Plan follow-up by Chaplains. As has happened in the past, the U-M IRB may want to discuss this increase with us in order to identify mitigation strategies. We have notified the IRB that the ODUSA is planning briefings with the Chaplain Corps to reinforce the Safety Plan procedures and confidentiality requirements.
 - Note that there have been no additional ORIOs reported since last month's report, and all outstanding ORIOs have been acknowledged by the U-M and USUHS IRBs with no further questions.
 - 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 shared an analysis of the areas in our budget where we are projecting a deficit with the PIs.
- Wave 3 Challenges
 - o Wave 3 consent review and approval process – these risks were described in a September 30, 2020 memo to the ODUSA.
 - The DHA Privacy Board has approved the DSA modification for the MHS HIPAA form; however, we will not receive any sort of VA prior approval. With the VA, we could be in a situation where we employ a VA HIPAA authorization form that ends up not being acceptable to the VA when it comes time to request health records data for linkage. While unlikely, it's also possible the approved MHS HIPAA form might not be acceptable to the providers of those data.
 - The risk related to the VA not having reviewed the HIPAA form prior to production was highlighted in the June 15 GSC meeting when a question was raised as to whether the VHA HIPAA consent language would allow access to VBA data.
- Enclave Support
 - o We continue to monitor priorities for Enclave support. We balance the primary Enclave support work with a number of more complex biomarker data support requests, which are outside of the reduced Enclave team scope in the STARRS-LS contract. We prioritize the primary work above other requests in accordance with project goals and to remain within budget/scope. As a result, the biomarker data support requests can take longer to service. As long as requestors are ok with this arrangement, we can continue to manage the work and priorities in this fashion.
 - Scope additions
 - o There are a few cost estimates for new scope that have yet to be made (Table 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

Total Cost to Date (Direct + Indirect):	3,059,976.00
Estimated Cost at Completion (E\$AC):	13,243,374.00
Total Budget:	12,809,390.00
Variance (Budget minus E\$AC):	-433,984.00
Reason For Variance:	After this month's updates, our projected deficit for the total five-year project increased somewhat (\$433,984 from last month's \$411,903). We will continue to monitor production rates and costs and update the projections accordingly.

Projections

Dollars Projected For Month:	243,808.00
Actual Dollars Used:	213,954.00
Variance (Projected minus Actual):	29,854.00
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 - 04/2021				
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****Data Col Tool****Hardware****DE Software****QC Recording Tool****Incentive****Administration****Payment Type****Payment Method**

MSMS
 Blaise 5
 Desktop; Other (Webcam, USB headset)
 N/A
 N/A
 Yes, R
 SRO Group; Other (CloudResearch (TurkPrime))
 Cash, prepaid (\$2); Other (ABS=\$2 giftcode -> prepaid; \$20/\$22 giftcode -> post)
 Imprest Cash Fund from ISR Business Office; Other (TurkPrime (now CloudResearch))

Report Period

Sep, 2021 (VCT)

Project Phase

Closing

Risk Level

On Track

Monthly Update

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

JSSAM has accepted the interviewer effects paper. The team has reviewed the proofs and sent them back. 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).

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.

Laura needs to do a final MSMS data set.

Special Issues**Cost**

Total Cost to Date (Direct + Indirect):	362,043.54
Estimated Cost at Completion (E\$AC):	376,192.58
Total Budget:	377,455.00
Variance (Budget minus E\$AC):	809.42

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

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 (WCJ -Remote Pilot) Woodcock-Johnson Remote Administration Pilot

Project Mode Primary: Telephone

Project Type Sponsored Projects **Project Status** Current

Budget **Direct Budget:** 65,472.00 **Indirect Budget:** 36,667.00 **Total Budget:** 102,139.00

Principal Investigator/Client Narayan Sastry (U of M/ISR/SRC)
Paula Fomby (U of M/ISR/SRC)

Funding Agency

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

Project Team **Project Lead:** Hongyu Johnson
Budget Analyst: Megan Gomez-Mesquita
Production Manager: Veronica Connors-Burge
Senior Project Advisor: Stephanie A Chardoul
Production Manager:
Production Manager:

Proposal #: no data

Description: The goal of this project is to remotely administer the Woodcock Johnson Tests of Cognitive Abilities, in the form of a Pilot test, to Respondents in their home. A tablet computer will be used to electronically display the pages of the Woodcock Johnson assessment tool to the Respondent while an SRO interviewer communicates via a video link (Zoom) on a laptop. The tablet will be sent to the Respondent's home in advance of the administration, including a pre-paid return mailer to be shipped back to us.

The current effort includes 2 components:

- 1) Technical system development and testing
- 2) Pre-test (n=20 families) to test system and feasibility

Currently, we are still working on the technical system development and testing (Component 1). We are planning to start the Pre-test (Component 2) in early 2022 (~02/01/2022-02/28/2022).

SRO Project Period 07/2021 - 03/2022

Data Col Period 02/2022 - 03/2022

Security Plan NA

Milestone Dates

PreProduction Start: 07/01/2021

Pretest End: 03/01/2022

Staffing Completed:

SS Train Start:

DC Start:

Pretest Start: 02/01/2022

Recruitment Start:

GIT Start:

SS Train End:

DC End:

Other Project

Team Members:

Stephanie Chardoul - SRO SPA
Sarah Crane - Survey Director (Project Consultant)
Helen (Hongyu) Johnson - Lead Project Manager
Ann Vernier - SRO staff
Veronica Connors-Burge - Production Manager
Youhong Liu - Blaise Programmer
John Gawlas - HelpDesk
David Bolt - HelpDesk
Russ Stark - SSL Staff

Other Project**Names:**

Sample Mgmt Sys NA
Data Col Tool NA
Hardware Laptop; Desktop; Tablet; [UM cell] Phone
DE Software NA
QC Recording Tool NA
Incentive NA
Administration NA
Payment Type NA
Payment Method NA

Report Period Sep, 2021 (WCJ -Remote Pilot) **Project Phase** Initiation

Risk Level On Track

Monthly Update

Project Management:

- The project has a new project lead who is working directly under the guidance of the project consultant to move the project forward.
- Continue to communicate with the PI team and the SRO Admin team on budget

Technical System Development and Testing (Component 1):

- Continue to develop and modify Blaise 4.8 programming to fit tablet setting
- Continue to develop technical security protocol on devices

Special Issues

Cost

Cost Sep 30, 2021

Total Cost to Date (Direct + Indirect):	3,851.72
Estimated Cost at Completion (E\$AC):	96,967.74
Total Budget:	102,139.00
Variance (Budget minus E\$AC):	5,171.26
Reason For Variance:	the project is under development

Projections

Projections Sep 30, 2021

Dollars Projected For Month:	7,887.92
Actual Dollars Used:	3,851.72
Variance (Projected minus Actual):	4,030.20
Reason For Variance:	the project is under development

Measures	Units Complete	RR	HPI
Current Goal: Goal at Completion: Current actual: 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	Sep, 2021 (WMH-Qatar)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	The SRC team continues to review the code for all QC indicator flags to ensure they are correct. Testing flags with some test data created internally.		
Special Issues	None		

Cost
Sep 30, 2021

Total Cost to Date (Direct + Indirect): 71,266.78
Estimated Cost at Completion (E\$AC): 72,380.06
Total Budget: 74,928.00
Variance (Budget minus E\$AC): 2,547.94
Reason For Variance: Saving dollars for unexpected support during production.

Projections
Sep 30, 2021

Dollars Projected For Month: 1,285.80
Actual Dollars Used: 1,730.30
Variance (Projected minus Actual): -444.50
Reason For Variance: minor variance in hours, will rebalance if needed

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

September 2021



Developmental Initiatives

TSME 22 Blaise 5 Testing

TSME21 RCLS

TSME22 Day in the Life Videos

TSME22 DCO Tech System Support FY22

TSME22 QC-Systems

TSME22 Self-Scheduling Interface for MSMS

TSME22 ST International

Developmental/Initiative Projects Dashboard

NonArchived Development Initiative and No-DataCol Projects												
Project	Type	Status	Project Lead	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
<i>TSME 22-Blaise 5 Testing (423562)</i>	Initiatives	Current	Gina-Qian Yang Cheung	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<i>TSME R-PAY SYSTEM RE-WRITE(483257)</i>	Initiatives	Current	Jeffrey L Smith	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>TSME SRO SYS MAINTENANCE-GENERAL (483910)</i>	Initiatives	Current	Jeffrey L Smith	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>TSME21-RCLS (425196)</i>	Initiatives	Current	Jim Rodgers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<i>TSME22 Day in the life of Video</i>	Initiatives	Current	Vivienne Y Outlaw	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<i>TSME22 DCO Tech System Support FY22</i>	Initiatives	Current	Vivienne Y Outlaw	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<i>TSME22-QC-Systems (483249)</i>	Initiatives	Current	Sarah Elisa Broumand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<i>TSME22-SelfSchedUI (483424)</i>	Initiatives	Current	Andrew L Hupp	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<i>TSME22-ST international (483227)</i>	Initiatives	Current	Gina-Qian Yang Cheung	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Project Name	(TSME 22-Blaise 5 Testing (423562)) TSME 22-Blaise 5 Testing (423562)				
Project Mode	Primary: Not Available				
Project Type	Developmental Initiatives		Project Status	Current	
Budget	Direct Budget:	30,000.00	Indirect Budget:	0.00	Total Budget: 30,000.00

Principal Investigator/Client

Funding Agency

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

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

Budget Analyst: Janelle P Cramer

Production Manager:

Senior Project Advisor:

Production Manager:

Production Manager:

Proposal #: no data

Description: this project for testing Blaise new features

SRO Project Period 08/2021 - 06/2022

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	Sep, 2021 (TSME 22-Blaise 5 Testing (Project Phase	Implementing
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Risk Level On Track

Monthly Update nothing worked

Special Issues no resources

Cost

Oct 08, 2021 **Total Cost to Date (Direct + Indirect):** 1,881.92

Estimated Cost at Completion (E\$AC): 33,960.13

Total Budget: 30,000.00

Variance (Budget minus E\$AC): -3,960.13

Reason For Variance: minor work

Projections
Oct 08, 2021

Dollars Projected For Month: 461.33
Actual Dollars Used: 405.69
Variance (Projected minus Actual): 55.64
Reason For Variance: minor work

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

PreProduction Start:

Pretest End:

Staffing Completed:

SS Train Start:

DC Start:

Pretest Start:

Recruitment Start:

GIT Start:

SS Train End:

DC End:

Other Project

Team Members:

Other Project Respondent Lookup

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 Sep, 2021 (TSME21-RCLS (425196)) **Project Phase** Implementing

Risk Level On Track

Monthly Update No new work this month.

Special Issues

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

Projections

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

Measures

Units Complete	RR	HPI
<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	(TSME22 Day in the life of Video) TSME22-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 07/2021 - 06/2022

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 Sep, 2021 (TSME22 Day in the life of V **Project Phase** Implementing

Risk Level On Track

Monthly Update With the return to campus work began and a timeline was developed for this project to get it completed before the end of the calendar year.

Special Issues

Cost **Total Cost to Date (Direct + Indirect):** 0.00

Oct 14, 2021 **Estimated Cost at Completion (E\$AC):** 0.00

Total Budget: 18,000.00

Variance (Budget minus E\$AC): 0.00

Reason For Variance:

Projections
Oct 14, 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 (TSME22 DCO Tech System Support FY22) TSME22-DCO Tech System Support (483248)

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:** 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 07/2021 - 06/2022

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 Max Malhotra

Team Members: Shaowei Sun

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 Sep, 2021 (TSME22 DCO Tech System **Project Phase** Implementing

Risk Level On Track

Monthly Update Officially deployed the change from NickName (entered by users into Fred) to the Display name set downloaded from UM db. Notification has been sent to technical system programmers who are importing or using the NickName. It is expected we will relabel this old variable by end of 2021.
Modified individual reports for the Display Name revisions.
DCO tested the new e-file module on Test Server.
Modified the project staff list as requested by SurveyTrak (Marsha) to be used in ST import.
Discussed Inventory report specs.
Add the function to suppress the Email notification to HD for project assignment closure.

Special Issues Due to the amount of time and changes needed to support our DCO systems we are currently projecting an overrun.

Cost Oct 15, 2021	<i>Total Cost to Date (Direct + Indirect):</i>	7,827.10
	<i>Estimated Cost at Completion (E\$AC):</i>	30,688.56
	<i>Total Budget:</i>	30,000.00
	<i>Variance (Budget minus E\$AC):</i>	-688.56
	<i>Reason For Variance:</i>	na

Projections Oct 15, 2021	<i>Dollars Projected For Month:</i>	8,039.37
	<i>Actual Dollars Used:</i>	3,380.66
	<i>Variance (Projected minus Actual):</i>	4,658.71
	<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 (TSME22-QC-Systems (483249)) TSME22-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: Project used to maintain and further develop Current QC systems such as OLIVE

SRO Project Period 07/2022 - 06/2022

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: Shaowei Sun, Mark Simonson, LihShwu Key, Andrew P, Hueichun Peng, Larry Daher

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 Sep, 2021 (TSME22-QC-Systems (483: **Project Phase** Implementing

Risk Level On Track

Monthly Update Team working on developing specification document for adding the inter-rater reliability function in OLIVE.

Special Issues

Cost *Total Cost to Date (Direct + Indirect):* 6,402.19

Sep 30, 2021 *Estimated Cost at Completion (E\$AC):* 29,891.90

Total Budget: 30,000.00

Variance (Budget minus E\$AC): 108.10

Reason For Variance: na

Projections
Sep 30, 2021

Dollars Projected For Month: 2,052.43
Actual Dollars Used: 1,921.68
Variance (Projected minus Actual): 130.75
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	(TSME22-SelfSchedUI (483424)) Self-Scheduling Interface for MSMS												
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:	Andrew L Hupp											
	Budget Analyst:	Megan Gomez-Mesquita											
	Production Manager:												
	Senior Project Advisor:												
	Production Manager:												
	Production Manager:												
Proposal #:	no data												
Description:	This technical initiative will continue the work of the respondent facing scheduling interface that wasn't able to be completed the prior fiscal year. In the prior fiscal the basic scheduling tool was created. The current remaining work centers around creating the manager side interface to be able to set parameters and the resulting data MSMS will need to provide the Blaise scheduler. Most of the development work is on the MSMS side to build and interface and the aggregation of data to pass to Blaise to use to determine which appointment slots can be shown on the screen. This budget is for the Blaise side of the work, not the MSMS portion.												
SRO Project Period	07/2021 - 06/2020												
Data Col Period													
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start:</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:</td> <td style="padding: 5px;">SS Train End:</td> </tr> <tr> <td style="padding: 5px;">DC Start:</td> <td style="padding: 5px;">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	James Rodgers - Tech Lead												
Team Members:	Holly Ackerman - Developer (MSMS API and other appointment related work)												
	Peter Sparks - Developer (R facing page)												
Other Project													
Names:													
Sample Mgmt Sys	NA												
Data Col Tool	Blaise 5												
Hardware	NA												
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	Sep, 2021 (TSME22-SelfSchedUI (483424))	Project Phase	Planning
Risk Level	On Track		
Monthly Update	Peter is making edits to Spanish based on feedback from the PSID Spanish testing Camila is conducting.		
	Nothing to report yet on the work to be done.		
Special Issues			

Cost	<i>Total Cost to Date (Direct + Indirect):</i>	0.00
	<i>Estimated Cost at Completion (E\$AC):</i>	0.00
	<i>Total Budget:</i>	10,000.00
	<i>Variance (Budget minus E\$AC):</i>	0.00
	<i>Reason For Variance:</i>	

Projections	<i>Dollars Projected For Month:</i>	0.00
	<i>Actual Dollars Used:</i>	0.00
	<i>Variance (Projected minus Actual):</i>	0.00
	<i>Reason For Variance:</i>	

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	(TSME22-ST international (483227)) TSME22 - ST international (483227)														
Project Mode	Primary: Not Available														
Project Type	Developmental Initiatives			Project Status	Current										
Budget	Direct Budget:	40,000.00	Indirect Budget:	0.00	Total Budget: 40,000.00										
Principal Investigator/Client															
Funding Agency															
IRB	HUM#:	Period Of Approval:													
Project Team	Project Lead:	Gina-Qian Yang Cheung													
	Budget Analyst:	Janelle P Cramer													
	Production Manager:														
	Senior Project Advisor:														
	Production Manager:														
	Production Manager:														
Proposal #:	no data														
Description:	this is a continued effort for ST international work														
SRO Project Period	01/1996 - 01/1996														
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:	many members														
Other Project Names:	ST international (483227)														
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	Sep, 2021 (TSME22-ST international (483227))	Project Phase	Initiation
Risk Level	On Track		
Monthly Update	very limited work		
Special Issues			
Cost			
Oct 08, 2021	Total Cost to Date (Direct + Indirect):	3,780.79	
	Estimated Cost at Completion (E\$AC):	39,759.73	
	Total Budget:	40,000.00	
	Variance (Budget minus E\$AC):	240.27	
	Reason For Variance:	minor work	

Projections
Oct 08, 2021

Dollars Projected For Month: 2,353.14
Actual Dollars Used: 1,513.10
Variance (Projected minus Actual): 840.04
Reason For Variance: minor work

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