

Survey Research Operations

Monthly Project Report

Sponsored

October 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*
 (ECHO) *Environmental Influences on Child Health Outcomes*
 (EDC Midline) *Every Dollar Counts Program Evaluation Midline Surveys*
 (H&WB) *Health and Wellbeing in Southeast Michigan*
 (HCAP 2020) *Harmonized Cognitive Assessment Protocol, 2020*
 (HCDC, H&C) *Housing & Children*
 (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*
 (LSA Space Survey) *LSA Space Survey*
 (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*
 (SRS 2022) *Social Relations 2022*
 (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*

Sponsored Projects Dashboard

[illegible]

Project Name	(ACL6) Americans' Changing Lives - Wave 6			
Project Mode	Primary: Telephone	Secondary: Face to Face	Total of Modes: 2	
Project Type	Sponsored Projects		Project Status	Current
Budget	Direct Budget:	495,251.00	Indirect Budget:	277,340.00
			Total Budget:	772,591.00
Principal Investigator/Client	Margaret Hicken (University of Michigan, SRC - SEH)			
Funding Agency	National Institutes of Health, National Institute on Aging			
IRB	HUM#:	HUM00153243	Period Of Approval:	Pending
Project Team	Project Lead:	Terri Ann Ridenour		
	Budget Analyst:	Grace Tison		
	Production Manager:	Lisa J Carn		
	Senior Project Advisor:	Shonda R Kruger-Ndiaye		
	Production Manager:			
	Production Manager:	James Koopman		

Proposal #: no data

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

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

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

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

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

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

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

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

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

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

PreProduction Start:	Pretest Start:
Pretest End:	Recruitment Start:
Staffing Completed:	GIT Start:
SS Train Start: 05/20/2021	SS Train End: 08/10/2021
DC Start: 06/17/2021	DC End: 11/29/2021

Other Project Team Members:

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

Other Project Names: "Racial inequalities in health throughout adulthood: The cumulative impact of neighborhood chemical and non-chemical stressors on epigenomic pathways" (aka, "Social epigenomics of racial health inequalities - SERHI")

Sample Mgmt Sys SurveyTrak
Data Col Tool Blaise 4.8
Hardware Desktop
DE Software NA
QC Recording Tool NA
Incentive Yes, R
Administration SRO Group
Payment Type Check, prepaid (\$30 (interview)); Other (Check, prepaid - \$50 (consent to WBD/making home appointment))
Payment Method NA

Report Period	Oct, 2021 (ACL6)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	<p>ACL6 (reboot) data collection continues. At this time, the sample includes 91 ACL participants who have agreed to complete their ACL6 interview. As of today, there are 32 completed interviews and one appointment scheduled. Data collection will end on 11/29/21 and we will transition to project closeout tasks.</p> <p>SRO is currently authorized by the PI to spend up to \$44,200 direct costs (\$69,000 total) to complete 10 additional ACL6 interviews. We have exceeded the number of interviews expected and are within budget. The funding for the reboot will be allocated only after the final, actual costs are known.</p>		

We have continued to monitor production metrics, send updated cost reports and manage expectations. Nick asked 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 budget:

L:\projects\ACL6\02 Budget\Proposal Docs\Reboot Ballpark Estimate

Special Issues

Cost
Nov 05, 2021

Total Cost to Date (Direct + Indirect):	800,159.88
Estimated Cost at Completion (E\$AC):	808,925.06
Total Budget:	772,591.00
Variance (Budget minus E\$AC):	-36,334.06
Reason For Variance:	As of this report, \$27,639 has been spent to-date. The total, projected cost to complete is currently \$36,334.

Projections
Nov 05, 2021

Dollars Projected For Month:	6,471.71
Actual Dollars Used:	4,909.77
Variance (Projected minus Actual):	1,561.94
Reason For Variance:	Projected interviewer hours are higher than actual hours used, based on ACL6 (Reboot) staff's limited availability. Their first priority remains ACL-Life sample management and data collection.

Measures

	Units Complete	RR	HPI
Current Goal:	1,058 (1,526 sample)	80%	5
Goal at Completion:			
Current actual:	761	57%	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-CARI; DRI-CXM; Live monitoring
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post (\$30)
Payment Method	Check through STRak RPay System

Report Period	Oct, 2021 (ACL-LIFE)	Project Phase	Implementing
----------------------	----------------------	----------------------	--------------

Risk Level	<i>Some Concerns</i>
-------------------	----------------------

Monthly Update	We end 38 weeks of data collection on Monday, November 15. That is, 26 weeks in the original design and an additional 12 week extension. We have started project closing tasks, including the documentation of lessons learned and finalization of all sample lines. The PI has also requested a debriefing session with the data collection team, to begin documenting feedback that will inform the methods section of her research papers.
-----------------------	---

Special Issues	Projected overrun continues to grow due to design modifications (i.e. 8-12 week data collection extension and increasing ToA to \$300) and other factors.
-----------------------	---

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	Total Cost to Date (Direct + Indirect):	807,536.99
Nov 05, 2021	Estimated Cost at Completion (E\$AC):	892,252.67
	Total Budget:	812,193.00
	Variance (Budget minus E\$AC):	-80,059.67

Reason For Variance:

Of the \$520,637 total, direct budget, \$517,651 has been spent to-date. We currently project a direct cost overrun of \$51,319 (15%).

Our current projections include the estimated effort required to reach the 80% overall response rate target. We currently have 322 remaining non-final lines and finish data collection on November 15 (the deadline of the 12 week data collection extension).

Here are intervention strategies implemented over the course of data collection to address the PI's main priority to increase response rate:

- Increased ToA (\$50)
- Increased ToA (\$100)
- Increased ToA (\$200)
- Increased final end-game ToA (\$300)
- 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 lower goals / strategies, via Pooja and the production management team
- Continue working to reach weekly goals and aiming to increase overall response rate given the PI's #1 priority and Nick's recommendation of a "kitchen sink approach"

Projections
Nov 05, 2021

Dollars Projected For Month:

85,595.55

Actual Dollars Used:

44,609.95

Variance (Projected minus Actual):

40,985.60

Reason For Variance:

Overall interviewer hours spent in October are lower than our projections.

Measures

	Units Complete	RR	HPI
Current Goal:	960 (n=1,284-83 NS)	80%	5
Goal at Completion:	960	80%	5
Current actual:	742	62%	7.71
Estimate at Complete:	742	62%	7.71
Variance:	218	18%	2.71

Other Measures

Re-Contact RR: 29%

Re-Interview RR: 86%

TLC Interviews: 8

HTR Interviews: 6

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

Oct, 2021 (AFHS)

Project Phase

Implementing

Risk Level

On Track

Monthly Update

October update

Replicate 2 - timeline of mailings ...

Initial screener invite letters were mailed on Thursday 23 September (n=22,381).

Postcard reminder mailed on 30 September (n=22,381).

Second screener reminder was mailed on 11 October. This includes a paper screener (n=21,325).

Final reminder mailing was mailed on 29 October - non-responders are assigned to one of four experimental groups 70% reminder packet is mailed in a Priority mailer + TOA of \$5, 10% Priority mailer+\$0, 10% USPS first class + \$5 and 10% USPS first class+\$0 (n=20,864).

Response at end of October...

1545 completed screener forms Screenner RR 7%

The eligibility rate is currently 69.3%.

Of the 1070 eligible cases, 600 have completed the main interview at a response rate of 56.1% (last week the response rate was 51.5%).

Other items...

Chrissy Evanchek began working on a costing template to help the PI group put together a preliminary design for a larger scale AFHS.

We are monitoring cases are progressing correctly through the study protocol.

Special Issues

Cost

Nov 16, 2021

Total Cost to Date (Direct + Indirect): 2,208,885.97

Estimated Cost at Completion (E\$AC): 2,478,550.49

Total Budget: 2,490,133.00

Variance (Budget minus E\$AC): 11,582.51

Reason For Variance:

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

Projections
Nov 16, 2021

Dollars Projected For Month: 140,806.26
Actual Dollars Used: 189,159.35
Variance (Projected minus Actual): -48,353.09
Reason For Variance: Variance is due to the timing of the invoices from DataForce and also more Respondent payments being made in October than projected.

Measures		Units Complete	RR	HPI
Current Goal:	2000		33.3%	NA
Goal at Completion:	2000		33.3%	NA
Current actual:	600		56%	NA
Estimate at Complete:	1000		68%	NA
Variance:	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 7% (n=1545), current eligibility rate 69% (n=1070), current main RR 56% (n=600)

Project Name	(ALS Controls) ALS Matched Control Recruitment				
Project Mode	Primary: Web				
Project Type	Sponsored Projects	Project Status	Current		
Budget	Direct Budget: 163,550.33	Indirect Budget: 91,589.18	Total Budget: 255,139.51		
Principal Investigator/Client	Steven Goutman (Univ of Michigan - Med School)				
Funding Agency					
IRB	HUM#: HUM00148060	Period Of Approval:			
Project Team	Project Lead: Rebecca Loomis Budget Analyst: Megan Gomez-Mesquita Production Manager: Senior Project Advisor: Peter Rakesh Batra Production Manager: Production Manager:				
Proposal #:	no data				
Description:	This is a web screening project that is mailing letters to an ABS sample of 15,000 HH's in the Midland and Grand Rapids area. The letter contains a link to a 5-10 minute Qualtrics survey that screens eligible Respondents for a study that includes a blood draw. SRO's involvement is only with the Respondent screening and incentive payment for completing the screening questionnaire.				
SRO Project Period	01/2020 - 12/2023				
Data Col Period	09/2020 - 10/2023				
Security Plan	NA				
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="padding: 5px;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>			PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:				
Other Project Team Members:	Dan Zahs (Sampling)				
Other Project Names:					
Sample Mgmt Sys	NA				
Data Col Tool	Other (Qualtrics)				
Hardware	NA				
DE Software	NA				
QC Recording Tool	NA				
Incentive	Yes, R				
Administration	ISR Group (SRC Business Office)				
Payment Type	Check, post (10)				
Payment Method	NA				

Report Period	Oct, 2021 (ALS Controls)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	October 2021: The Michigan Medicine Facebook ad continues to generate interest, spurring the PI team to hire help contacting those who have responded. Recruitment for the larger study is going well and the client continues to be happy. Raphael Nishimura continues to purchase and clean new sample every two months for the ongoing mailings.		
Special Issues			

Cost
Nov 16, 2021

Total Cost to Date (Direct + Indirect): 73,969.95
Estimated Cost at Completion (E\$AC): 176,815.27
Total Budget: 255,139.51
Variance (Budget minus E\$AC): 78,324.24
Reason For Variance: Minor projection updates.

Projections
Nov 16, 2021

Dollars Projected For Month: 9,580.35
Actual Dollars Used: 7,917.55
Variance (Projected minus Actual): 1,662.80
Reason For Variance: Postage costs for the second mailing of the month hit too late, and will be rolled into next 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	(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

Oct, 2021 (BFY)

Project Phase

Implementing

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

Project updates:

BFY Age 3 data collection continues on goal in week 20 with +15 interviews ahead of the cumulative goals.

The Age 3-4 follow up effort started in October 2021. We are reaching out to the families 3 months after the i interview to update the contact information and continue doing so until the Age 4 lab visit conducted by the Pls. SRO is also informally consulting for the BFY research team on the best strategies for projecting hours, planning the lab workload, and reaching out to the respondents to invite them to the lab visits.

Data collection / Sample:

Age 3 results by site through week 7:

	Goal	Actual	+/-
Total	291	306	
NE	72	84	
NY	90	99	
MN	43	41	
LA	86	82	

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 mid-wave follow up is ongoing and should conclude in November. We worked out processes for tracking and following respondents in preparation for the Age 4 lab visit.

Finances:

We are reaching out to the finance group to understand why the overrun increased from \$518K in September to \$547K in October despite monthly underrun ~6K in October.

Special Issues

Cost
 Oct 17, 2021

Total Cost to Date (Direct + Indirect):	5,993,553.13
Estimated Cost at Completion (E\$AC):	7,856,766.07
Total Budget:	7,309,640.73
Variance (Budget minus E\$AC):	-547,125.34
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 were requested to cover -\$518K based on September overrun which reflected savings of about \$66,530 since our last shared overrun estimate in October 2020. However, we are not sure why the overrun increased in October despite monthly underrun and are reaching out to the finance group for clarifications.

Projections
 Oct 17, 2021

Dollars Projected For Month:	112,716.95
Actual Dollars Used:	106,887.05
Variance (Projected minus Actual):	5,829.90
Reason For Variance:	Lower project management and interviewing time. One iwer attrition since the September training for health reasons.

Measures

	Units Complete	RR	HPI
Current Goal:	291	29%	7.0
Goal at Completion:	907	93%	7.0
Current actual:	306	31%	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%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="width: 50%; vertical-align: top;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>				PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:					
Other Project Team Members:	Donnalee Grey-Farquharson, Kathy LaDronka, William Lokers, Hongyu Johnson, Keith Leibetreu, James Koopman					

Other Project**Names:**

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

Report Period Oct, 2021 (C.A.R.E.) **Project Phase** Closing
Risk Level On Track
Monthly Update Data Collection and post data collection work is complete. Once charges are reversed this MPR will be archived.

Project Management:

-Continue on working on new funding budget with the PI team for the next wave.

Data Manager:

- Continue on wrapping up final data cleaning process.

Questionnaire:

- N/A

System

- Continue to work on modifications specifications 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**

Oct 31, 2021
Total Cost to Date (Direct + Indirect): 1,468,559.67
Estimated Cost at Completion (E\$AC): 1,468,559.67
Total Budget: 1,537,084.42
Variance (Budget minus E\$AC): 68,524.75
Reason For Variance: Final Underrun

Projections

Oct 31, 2021
Dollars Projected For Month: 0.00
Actual Dollars Used: 466.01
Variance (Projected minus Actual): -466.01
Reason For Variance:

Charges are for technical development work done in September but hit in October. These charges will be reversed and put on a hardship account for next wave, setup in process.

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	Oct, 2021 (CAMS 2021)	Project Phase	Implementing
----------------------	-----------------------	----------------------	--------------

Risk Level	On Track
-------------------	----------

Monthly Update	<p>During October the team:</p> <ol style="list-style-type: none"> 1. Trained logging staff 2. Made adjustments to logging protocol and system 3. Began sending weekly reports to project staff 4. Prepared list of cases for reminder mailing #1 5. Began delivering SAQs to project staff
-----------------------	--

The reminder mailing was sent on 10/27/2021 to 4563 respondents. 2,286 completed SAQs were logged in

October.

Special Issues**Cost**

Nov 11, 2021

Total Cost to Date (Direct + Indirect): 373,286.73**Estimated Cost at Completion (E\$AC):** 385,849.31**Total Budget:** 399,597.00**Variance (Budget minus E\$AC):** 13,747.69**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

Nov 11, 2021

Dollars Projected For Month: 108,305.52**Actual Dollars Used:** 109,748.58**Variance (Projected minus Actual):** -1,443.06**Reason For Variance:**

Postage costs for returned mail were higher than projected. Originally some returned mail was projected to arrive in September. Returned mail did not begin to arrive until October.

Measures

	Units Complete	RR	HPI
Current Goal:	5256	66.4%	
Goal at Completion:	5256	66.4%	
Current actual:	3472	48.0%	
Estimate at Complete:	4688	64.0%	
Variance:	568	2.4%	

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</td> <td style="padding: 5px;">Pretest Start:</td> </tr> <tr> <td style="padding: 5px;">Pretest End:</td> <td style="padding: 5px;">Recruitment Start: 11/15/2020</td> </tr> <tr> <td style="padding: 5px;">Staffing Completed: 12/15/2020</td> <td style="padding: 5px;">GIT Start:</td> </tr> <tr> <td style="padding: 5px;">SS Train Start: 02/18/2021</td> <td style="padding: 5px;">SS Train End: 02/18/2021</td> </tr> <tr> <td style="padding: 5px;">DC Start:</td> <td style="padding: 5px;">DC End:</td> </tr> </table>			PreProduction Start: 10/15/2020	Pretest Start:	Pretest End:	Recruitment Start: 11/15/2020	Staffing Completed: 12/15/2020	GIT Start:	SS Train Start: 02/18/2021	SS Train End: 02/18/2021	DC Start:	DC End:
PreProduction Start: 10/15/2020	Pretest Start:												
Pretest End:	Recruitment Start: 11/15/2020												
Staffing Completed: 12/15/2020	GIT Start:												
SS Train Start: 02/18/2021	SS Train End: 02/18/2021												
DC Start:	DC End:												
Other Project Team Members:	Peter Batra - Programmer and technical lead, former MCBII Pilot Lead, Laura Yoder - Data Ops, Dave Dybicki - Systems Programmer, Grace Tison, 2nd Budget Analyst												
Other Project Names:													
Sample Mgmt Sys	SMS												
Data Col Tool	Illume												
Hardware	Laptop; [UM cell] Phone												
DE Software	NA												
QC Recording Tool	NA												
Incentive	Yes, R												
Administration	SRO Group												
Payment Type	Check, post (30)												
Payment Method	NA												

Report Period Oct, 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
Nov 16, 2021

Total Cost to Date (Direct + Indirect):	636,850.38
Estimated Cost at Completion (E\$AC):	640,672.08
Total Budget:	643,762.00
Variance (Budget minus E\$AC):	3,089.92
Reason For Variance:	Projected cost to close is in good shape.

Projections
Nov 16, 2021

Dollars Projected For Month:	8,900.24
Actual Dollars Used:	7,919.81
Variance (Projected minus Actual):	980.43
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

<i>PreProduction Start:</i> 06/01/2021	<i>Pretest Start:</i>
<i>Pretest End:</i>	<i>Recruitment Start:</i> 07/12/2021
<i>Staffing Completed:</i> 09/08/2021	<i>GIT Start:</i>
<i>SS Train Start:</i> 10/28/2021	<i>SS Train End:</i> 11/04/2021
<i>DC Start:</i> 11/08/2021	<i>DC End:</i> 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 Oct, 2021 (CDS-21) **Project Phase** Implementing

Risk Level On Track

Monthly Update Iwer training 1 began in late October (10/28-11/4). Production successfully launched on 11/8.

Special Issues

Cost
Nov 05, 2021

Total Cost to Date (Direct + Indirect): 322,945.37
Estimated Cost at Completion (E\$AC): 2,231,938.06
Total Budget: 2,288,240.00
Variance (Budget minus E\$AC): 56,301.93
Reason For Variance:

Projections
Nov 05, 2021

Dollars Projected For Month: 85,800.12
Actual Dollars Used: 67,912.26
Variance (Projected minus Actual): 17,887.86
Reason For Variance:

We projected to spend \$86K direct cost but actually spent \$68K, for a monthly direct cost underrun of \$18K. This underrun is spread across a variety of categories, including: Printing/Duplicating, Supplies, and TSG hours.

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	(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

Oct, 2021 (ECHO)

Project Phase

Implementing

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

[Phase 1: Recruitment and Prenatal Surveys]

Recruitment continues in 7 prenatal clinics. We will deliver a 2-day remote training to the new Interviewer (Recruiter) in early December.

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

Production Stats

To date, 1,236 women have been recruited in clinics. Among those cases, 879 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.

Prenatal Survey 1: 758

Prenatal Survey 2: 554

[Phase 2: 3-Month Data Collection Summary]

Babies born: 741

3-month sample released: 736
 3-month interviews completed: 523
 3-month biospecimen collected: 316
 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 Phase 3 team continues to work on initial planning and documentation of system requirements. Development of a simple sample management system (i.e. SurveyTrak, WebLog) is in progress and will support the administration of age 4 protocols, including REDCap surveys. A project resource (Kasyera) has been added to the team, with limited availability until the new year. An additional project management resource (SSA/SSI) is needed to support all ECHO protocols.

Initial training is underway for project team members whose role requires access to the REDCap system for data collection. In early January, SRO data collection staff (Kasyera) 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. However, only 12 cases are planned for the first 6 months of data collection. The majority of Age 4 sample is expected to begin next summer 2022. 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

We need the special attention of the Phase 1 data manager(s) to resolve the high-level request from the PI (i.e. date stamp data for PN1 and PN2 survey data) and other data issues. An initial draft of date stamp data was sent and we're waiting for review / acceptance from the client.

Cost
Nov 05, 2021

Total Cost to Date (Direct + Indirect): 356,650.16

Estimated Cost at Completion (E\$AC): 356,650.16

Total Budget: 407,722.00

Variance (Budget minus E\$AC): 51,071.84

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

We just received our SRO sub Project/Grant for ECHO Y6 and have provided instructions to our team members and field interviewers to transfer their hours to the new shortcodes.

We (Eva and Terri) will be meeting this week to review the overall Year 6 budget and staff projections. Combined with the Years 1-4 Carry-forward budget, we believe it 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 ~November 2021.

Projections
Nov 05, 2021

Dollars Projected For Month: 0.00

Actual Dollars Used: 22,323.52

Variance (Projected minus Actual): -22,323.52

Reason For Variance: I believe we don't have our Y6 projections loaded in CRS yet. We will provide an update next month.

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

Other Measures

Project Name	(EDC Midline) Every Dollar Counts Program Evaluation Midline Surveys					
Project Mode	Primary: Telephone		Secondary: Face to Face		Total of Modes: 2	
Project Type	Sponsored Projects				Project Status	Current
Budget	Direct Budget:	1,513,016.00	Indirect Budget:	637,157.00	Total Budget:	2,150,173.00
Principal Investigator/Client	Elizabeth Rhodes (OpenResearch Lab) Stephanie Chardoul (Survey Research Operations) Sarah Miller (Universityof Michigan)					
Funding Agency						
IRB	HUM#:	HUM00145626/CR	Period Of Approval:	1/25/2021-1/18/2022		
Project Team	Project Lead:	Barbara Lohr Ward				
	Budget Analyst:	Megan Gomez-Mesquita				
	Production Manager:	Barbara Aghababian-Homburg				
	Senior Project Advisor:	Kirsten Haakan Alcser				
	Production Manager:	Donnalee Ann Grey-Farquharson				
	Production Manager:	Melissa Luker				
Proposal #:	no data					
Description:	The overall project is funded by a consortium (currently consisting of both OpenResearch Lab (Open) and NIH.					

OpenResearch Lab (Open) (formerly Y Combinator Research) and the principal investigators are conducting an evaluation of Every Dollar Counts, a cash assistance gift program being administered by two non-profit organizations: CitySquare, based in Dallas, Texas, and Heartland Alliance, located in Chicago, Illinois (the Community Partners).

The purpose of this study is to explore how the program affects multiple dimensions of recipients' lives. Key outcomes of interest include health, subjective and material well-being, time use, financial health, labor market participation, social and civic engagement, and effects on children. SRO concluded the Baseline interviews in 2020. The EDC Midline will reach out to all Baseline respondents by either telephone or face-to-face over a five-month period in 2022 to request their participation in the Midline interview. This budget assumes an SRO involvement period of 14 months commencing September 2021, with the data collection taking place during a 5-month period, starting March 2022.

SRO assumes approximately 89% of the 3,000 Baseline respondents are located and willing to be interviewed again. SRO cannot guarantee a response rate; however, this is our best estimate of the outcome based on effort. SRO will monitor effort, track project progress, and continually evaluate how the project progress aligns with our budget assumptions. Informed by our experience with panel studies, we feel that an 89% overall response rate is a reasonable expectation given the current design, the resources allocated in the current budget, and the design of the EDC Program (which has allowed for multiple, between-wave contacts and updated contact information for most of the sample).

The SRO budget includes effort to complete face-to-face interviews with approximately 120 (out of 150) "hard to reach" cases identified by Open. The budget assumes approximately 120 of those cases are interviewed in person and are given a \$100 a case token of appreciation for participation in the interview (to be conservative we have included funds for 150 tokens of appreciation). Approximately 1,950 interviewer hours are allocated for these activities (based on an estimated HPI of 10.0 for the interviews and 5.0 for the initial contact attempt/locating). Mileage costs for fieldwork are budgeted at 270 trips that average 52 miles per trip.

All remaining cases will be interviewed by telephone (approximately 2,550 interviews). Telephone interviews will be administered from the SSL and by decentralized field staff. With each respondent, SRO will:

- Confirm continued consent to participate (no actual consent forms will be reviewed with respondents, and no signatures are required at the midline measurement)
- Request contact information for friends and family to help locate the respondent in the future if we cannot reach them
- Administer the questionnaire (approximately 80 minutes in length)

Approximately 14,635 interviewer hours are allocated for these activities (based on estimated HPIs of 5.5 and 6.0 for telephone interviews completed by the SSL and by decentralized field interviewers, respectively).

Post Collection Processing:

- SRO will conduct standard data cleaning and produce a preliminary and final dataset with documentation.

Standard data cleaning does not include customization (such as derived variable or index creation, dataset merging, sample weighting, recoding, or coding of other-specify responses). We will ensure that all components of a case are present with a reference variable (SID, OID) present to allow for merging and data analysis. Our main documentation is conveyed through data dictionaries and questionnaire codebook.

- We have not budgeted for coding any open-ended responses.

Deliverables:

- SRO will provide daily, automated delivery of questionnaire data and sample management system data for cases with a final disposition and sample management system data for all cases that have been released to interviewers.
- Sample management data that will be delivered daily to Open will include the following case-level variables:
 - o Contact attempts ☐ number by type (SMS, phone, email, in-person)
 - ☐ date/time of last attempt
 - o Appointments ☐ date/time of scheduled appointments
 - ☐ dummy variables for the occurrence of broken / missed appointments
 - ☐ how appointment was made (self-scheduler/by interviewer)
 - o Current incentive assigned to the sample line
 - o SRO will work with Open during pre-production to finalize variables and format.
- We will work with Open between completion of active data collection and end of the funding period for Midline to reconcile any outstanding discrepancies in the data.
- SRO will also deliver:
 - o Daily data collection progress reports
 - o A final summary of field methods at the end of data collection
 - o A full survey dataset with all participant contact information at the close of data collection.

SRO Project Period
Data Col Period
Security Plan
Milestone Dates

09/2021 - 10/2022
 03/2022 - 07/2022
 NA

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

Pretest Start:
Recruitment Start:
GIT Start:
SS Train End:
DC End:

Other Project
Team Members:

Kirsten Alscer (SPA), Barbara Ward (Project Lead) , Donnalee Grey-Farquharson (Project Manager) Marsha Skoman (Tech Lead), Jeff Smith (Tech Lead backup), Peter Sparks (Blaise Programmer), Ashwin Dey (Webtrak Programmer), Stephanie Windisch (Data Manager), Barb Homburg (Production manager, Field), William Keating (Production manager, SSL), Megan Gomez-Mesquita (Financial Analyst)
 EDC

Other Project
Names:

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

SurveyTrak
 Blaise 4.8
 Laptop; [UM cell] Phone
 N/A
 Camtasia
 Yes, R
 SRO Group; Other (PI Payment)
 Cash, post (\$100.00); Other (\$50)
 Interviewer payment of cash (reimbursed/reconciled via Tenrox); Other (Electronic payment by PIs)

Report Period

Oct, 2021 (EDC Midline)

Project Phase

Initiation

Risk Level

On Track

Monthly Update

Budget:
 The subPG with the business school is now in place. However, there is a 15% cur in the NIH award/portion of the budget (through the Ross Business School) which will be covered by ORL. We requested \$704,815 direct cost from Ross, and are actually receiving \$604,731 direct cost. So we will need \$100,084 direct cost (plus IDC added on top) additional from ORL.

Scope/change:

Some scope changes are being negotiated. These include customization of the Scheduler and increased Blaise

programming. ORL has agreed to the Scheduler Customization charges and will let us know by 11/30 regarding the increased Blaise scope. These increased budget and costs are not yet projected, nor have any funds extra been received and so neither are reflected in the current budget report.

Programming:

The scope specified only a 15% change from the Baseline instrument but instead there is a 34% change so this will require more effort. With this many changes we are taking the time to streamline the Blaise specs with track changes so that the Programmer will be smooth as possible.

The STRak programming is being spec'd and the data dictionary created in collaboration with the Research team.

The requirements for the Scheduler are also being worked out in collaboration with the ORL team.

Special Issues

Cost

Oct 31, 2021

Total Cost to Date (Direct + Indirect):	26,824.68
Estimated Cost at Completion (E\$AC):	2,113,817.43
Total Budget:	2,150,173.00
Variance (Budget minus E\$AC):	10,333.57
Reason For Variance:	Some costs are still to be projected.

Projections

Oct 31, 2021

Dollars Projected For Month:	31,990.65
Actual Dollars Used:	26,824.68
Variance (Projected minus Actual):	5,165.97
Reason For Variance:	Some programming work delayed to November.

Measures

	Units Complete	RR	HPI
Current Goal: Goal at Completion: Current actual: 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:	Tagh Reid 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	Oct, 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):	1,001,384.00
Estimated Cost at Completion (E\$AC):	2,504,584.00
Total Budget:	2,317,801.68
Variance (Budget minus E\$AC):	-216,782.00
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:	1,315.00
Actual Dollars Used:	285.00
Variance (Projected minus Actual):	1,031.00
Reason For Variance:	Minimum charges 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	(HCAP 2020) Harmonized Cognitive Assessment Protocol, 2020														
Project Mode	Primary: Face to Face		Secondary: Telephone												
Project Type	Sponsored Projects		Project Status	Current											
Budget	Direct Budget:	3,300,000.00	Indirect Budget:	1,188,000.00	Total Budget: 4,488,000.00										
Principal Investigator/Client	Kenneth Langa (SRC) David Weir (SRC)														
Funding Agency															
IRB	HUM#:	HUM00099822	Period Of Approval:												
Project Team	Project Lead:	Maureen Joan O'Brien													
	Budget Analyst:	Richard Warren Krause													
	Production Manager:	Dianne G Casey													
	Senior Project Advisor:	Evanthia Leissou													
	Production Manager:														
	Production Manager:														
Proposal #:	no data														
Description:	Building off the 2016 Harmonized Cognitive Assessment Protocol (SRO #15-0011R01) experience, this project will involve the completion of a face-to-face CAPI interview, designed to provide a dementia assessment of HRS respondents. A sample of 4649 respondents (one per household) who are 65 years of age or older will be selected for this effort. The questionnaire will be administered to respondents after their HRS 2020 interview has been completed. The sample will not be clustered geographically. We propose to staff a team of approximately 32 interviewers. It is expected that this team will carry out well-planned regional trips in order to complete the 3200 in-person interviews. The respondent questionnaire length is expected to be 60 minutes. An informant interview will also be completed for each of the respondents interviewed. The informant questionnaire is expected to be 25 minutes and can be administered by telephone.														
SRO Project Period	01/2020 - 12/2021														
Data Col Period	07/2020 - 08/2021														
Security Plan	NA														
Milestone Dates	<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	Oct, 2021 (HCAP 2020)	Project Phase	Planning
----------------------	-----------------------	----------------------	----------

Risk Level	On Track
-------------------	----------

Monthly Update	There was no activity on HCAP2020 this month. Most effort is being put into HCAP Ireland work. The underrun decreased by approximately 70k last month due to updating Interviewer rates. We will continue to monitor this and tighten up projections as we get closer to production and know more about who our iwers will be (OSers vs NH's) 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.

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 almost complete, including changes to videos, scripts, slides, and scoresheets. Additionally, the intro slides 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 Nov 16, 2021

Total Cost to Date (Direct + Indirect):	184,079.80
Estimated Cost at Completion (E\$AC):	4,331,610.32
Total Budget:	4,488,000.00
Variance (Budget minus E\$AC):	156,389.68
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 Nov 16, 2021

Dollars Projected For Month:	741.76
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	741.76
Reason For Variance:	n/a

Measures

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

Other Measures

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

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

Project Type Sponsored Projects **Project Status** Current

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

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

Funding Agency NICHD, HUD, RWJ Foundation, MacArthur Foundation

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

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

Proposal #: no data

Description:

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

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

SRO Project Period

04/2016 - 02/2020

Data Col Period

05/2017 - 09/2018

Security Plan

NA

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

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

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

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

Risk Level	<i>On Track</i>
-------------------	-----------------

Monthly Update	<p>During October 2021, SRC activities included the following:</p> <p>Task 1: Management, Budget and Work Plan</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> Reviewed/monitored project expenses and projections. Monitored subcontracts, project invoicing and payments. Prepared and delivered geocoded files with Census variables Received invoice for long term storage of study supplies. <p>Task 2: Sampling</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> No activity this month <p>Task 3: Questionnaire Development</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> No activity this month <p>Task 4: CAI Programming</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> No activity this month. <p>Task 5: Systems Programming</p> <p>% Task Spent to date</p> <ul style="list-style-type: none"> Received timesheet correction for accidental project charges <p>Tasks 6, 7: Interviewer Recruitment & Hiring, Training</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> No activity this month <p>Task 8: Main Data Collection</p> <p>% Task Spent to Date</p> <p>Task 9: Post Collection Processing</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> Received, logged, and scanned one incoming Social Security form. Delivered to research team via SFTP. Ordered gift card for respondent payment, shipped card to respondent, closed and reconciled gift card fund. <p>Task 10: Weighting</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> No activity this month <p>Task 11: Final Data Deliverables</p> <p>% Task Spent to Date</p> <ul style="list-style-type: none"> No activity this month <p>Areas of Concern (changes shown in italics):</p>
-----------------------	--

Wave 2

- Assuming that SRO has the use of all awarded NICHD funds, the project is projecting an underrun estimated at approximately \$60,000 in direct costs. The underrun results from staffing changes at SRO brought about by the pandemic, the revised verification effort, as well as interviewer efficiency during production interviewing. There are some unknowns, such as the response rate for the administrative records forms and the level of support required for respondents for completion of the records forms. SRO will continue to update the research team on financial status.

Wave 2 Work Scope Changes:

- Notification of new specifications for State Data Consent forms received on February 9th, 2020, requiring revising and reprinting forms, developmental costs, and revised IRB submissions.
- Questionnaire Development – Budgets assumed that final clean copies of all instruments be delivered by early August 2019 to allow for review and programming specification delivery using assigned resources.
- A household screener/exit interview has been developed and will be programmed to facilitate locating children who do not live with the Wave 1 PCG. The instrument will collect contact information for new PCGs (approved by PIs).
- The start of Wave 2 was delayed until April/May 2020 at the request of the research team. This will impact the cost of pre-production, respondent locating, and likely also impact the cost of interviewer hiring and training.
- The sample size is being increased to include the full Wave 1 sample, including households where no children were interviewed at Wave 1.
- The start of Wave 2 is being further delayed by the coronavirus pandemic. This will negatively impact project costs unless there are other offsets. Moving to an exclusively telephone data collection mode may reduce costs, but will also result in fewer completed interviews, both at the household level (due to lower response rate) and individual level (no child assessments). In addition, many of the measures cannot be collected over the phone, including laser tape measurement, physical measures, dried blood spots, interviewer household observations, neighborhood observations, or administration of the Social Security Administration or records-matching forms.
- Social Security forms will be collected via a mail survey (approved by the research team). The data collection will be conducted following a protocol for a traditional mail survey, with a cohort beginning each month.
- A holiday card mailing with a study magnet will be shipped to respondents in December 2020.
- Remediation will be attempted for incomplete Social Security record linkage forms. This will require additional labor and postage to mail forms back to the respondent, as well as an IRB submission for the checklist and correction guide documents to be included in the mailing.
- Telephone data collection will be extended through February 6, 2021.
- Reminder/assistance calling will be conducted for all households receiving a request for SSN-form completion.

Special Issues

Cost
Nov 05, 2021

Total Cost to Date (Direct + Indirect):	11,962,226.30
Estimated Cost at Completion (E\$AC):	11,962,668.30
Total Budget:	12,043,058.00
Variance (Budget minus E\$AC):	80,389.70
Reason For Variance:	Scope changed related to the COVID-19 pandemic resulted in lower than anticipated project costs.

Projections
Nov 05, 2021

Dollars Projected For Month:	3,306.45
Actual Dollars Used:	3,466.44
Variance (Projected minus Actual):	-159.99
Reason For Variance:	Charges for long term storage hit the project.

Measures

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

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:	Kelley Lynn Popielarz				
	Senior Project Advisor:	Evanthia Leissou				
	Production Manager:	Ian Ogden				
	Production Manager:					
Proposal #:	no data					
Description:	<p>[Updated 09/2021]</p> <p>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).</p> <p>An external vendor, DataForce, will handle (1) formatting, printing and mailing of the booklet (in English and Spanish); (2) sending reminder mailings to each batch of sample; and (3) scanning completed booklets and delivering data to SRO for processing and delivery.</p> <p>The sample size for this project is significantly larger than other "off-year" mail studies such as LHMS. Relatedly, and also unlike past instances of HRS off-year mail studies, 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.</p> <p>Key differences between the Spring and Fall efforts:</p> <ul style="list-style-type: none"> (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	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> PreProduction Start: 03/01/2021 Pretest End: Staffing Completed: SS Train Start: 06/08/2021 DC Start: 05/28/2021 </td> <td style="padding: 5px;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: 06/08/2021 DC End: 03/31/2022 </td> </tr> </table>				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
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:	<p>Technical Leads: Ian Ogden & Jim Rodgers</p> <p>MSMS Developers: Pam Swanson & Jim Rodgers</p> <p>Data Manager: Laura Yoder</p> <p>Project Support 1: Jeannie Baker (Replacing Becky Scherr, as of late-June, 2021)</p> <p>Project Support 2: Melissa Luker (Spring Only)</p> <p>Project Support 3: Debra Heier (Locating, Spring Only)</p> <p>Project Support 4 (RPay & Mailing-Support Only, Spring): Anna Fuqua-Smith</p> <p>Project Support 5 (RPay & Mailing-Support Only, Fall): Daniah Buageila</p> <p>Production Manager: Pooja Varma-Laughlin (Spring Only)</p> <p>Production Manager / Scheduler: Kelley Popielarz (Fall Only)</p>					

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

Report Period	Oct, 2021 (HRS 2021 OYMS / COVID 5	Project Phase	Implementing
Risk Level	<i>On Track</i>		
Monthly Update	<p>[Spring Effort - Transitioning to Initial Closeout / Closing Tasks]</p> <p>As of mid-November, returns from the Spring effort have dropped to ~5 per week. SRC-HRS have authorized a volume-based end of Spring data collection: Once there are zero returns for two weeks.</p> <p>[Fall - Data Collection]</p> <p>Data collection and logging are going smoothly. Staff hours and flexibility in scheduling have generally allowed us to keep up with and react to daily intake.</p> <p>Supply chain issues and diminished USPS service have introduced new unpredictability and logistical considerations in our standard mail-study designs. We have experienced several days without mail delivery from the USPS, and our material-consumption for reminders is slightly higher than projections (in the case of Spanish SAQs, requiring a small, but expensive additional print-run). Reduced USPS service standards implemented in Fall, 2021 (resulting in fewer completed questionnaires being delivered prior to scheduled reminders) may be contributing.</p> <p>We have decided not to move forward with a proposed modified design / experiment for the final reminder mailing. This would have entailed the use of a custom envelope intended to 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); the final reminder mailing will go out via USPS Priority. HRS Mail Study reminder protocols are likely ripe for experimentation.</p> <p>[Data-Out & Disposition Coding]</p> <p>Delivery of data from Spring SAQs is current; the data-schema for the Fall survey should be finalized soon and we expect to receive the first delivery of Fall production data on 12/10/2021.</p> <p>For several reasons, we are proposing to the SRC-HRS team that we define "1001" in the 2021 COVID Survey project to refer to "non-blank questionnaire received" (i.e. at least one question answered) and forgo the retroactive recoding of certain cases to "1005" (Accepted Partial Questionnaire).</p>		
Special Issues	<p>(1) [NEW] Potential impact of reduced USPS Service Standards on logging projections, material-consumption and respondent burden.</p> <p>(2) [Existing] (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			
Nov 10, 2021	Total Cost to Date (Direct + Indirect):	1,126,814.23	
	Estimated Cost at Completion (E\$AC):	1,245,595.62	
	Total Budget:	1,333,924.00	
	Variance (Budget minus E\$AC):	88,328.38	

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 an \$88K underrun. Primary drivers are: (1) Lower-than-expected RR from the Spring effort (which may ultimately be the case for the Fall effort as well); (2) Fewer full-time staff (inc. management & day-to-day operations) being available into the fall, shifting various key production tasks to contingent Survey Techs.

Projections
Nov 10, 2021

Dollars Projected For Month:

93,820.32

Actual Dollars Used:

20,174.86

Variance (Projected minus Actual):

73,645.46

Reason For Variance:

In decreasing order of impact: (1) Project initialization costs from DataForce not being billed until November (~\$40K - pushed forward); (2) Indirects coming in below projections (~\$19K), driven primarily by later-than-projected billing from DataForce; (3) A round of check-voids from Spring hitting in October (~\$6K).

Measures

	Units Complete	RR	HPI
Current Goal:	15,700	80.0%	N/A
Goal at Completion:			
Current actual:	10,107	51.6%	
Estimate at Complete:			
Variance:			

Other Measures

Note: As of the October, 2021 MPR entry, production figures above include both the Spring (largely concluded) and Fall (ongoing) efforts.

Units Completed & RR by Release (as of 11/16/2021):

	n, IW		RR
Spring	8,310		60.2%
Fall	1,797		31.1%

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>11/01/2021</td></tr><tr><td>Pretest End:</td><td>11/20/2021</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>04/15/2023</td></tr></table>					PreProduction Start:	01/01/2021	Pretest Start:	11/01/2021	Pretest End:	11/20/2021	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:	04/15/2023
PreProduction Start:	01/01/2021	Pretest Start:	11/01/2021																						
Pretest End:	11/20/2021	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:	04/15/2023																						
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	Oct, 2021 (HRS 2022 Panel)	Project Phase	Planning
Risk Level	On Track		
Monthly Update	During the month of October, the team focused on technical development, training coordination, and preparing for pretest data collection. The HRS MSMS operational test and review was conducted October 11 through October 22. A summary will be shared with results from the test. HRS 2022 Pretest training was held from October 25 through October 27 with 24 interviewers. Pretest data collection is scheduled to start on November 1 and end on November		

20. In addition to pretest, we will be asking a sub-set of pre-test interviewers to complete mock web interviews and Spanish interviews November 22 through November 24 to gather instrument (Spanish and Web Self) and MSMS DCA feedback for production.

TL/PC training is scheduled for January 2020. Main training is scheduled for February 2020 with production beginning in early March.

Special Issues

-Potential impact on staffing and recruitment of the vaccination requirement for in person interviewing

Cost
Nov 08, 2021

Total Cost to Date (Direct + Indirect): 632,050.82
Estimated Cost at Completion (E\$AC): 17,210,526.91
Total Budget: 16,508,390.00
Variance (Budget minus E\$AC): -702,136.91
Reason For Variance:

The HRS 2022 Panel project includes the recent base pay increases to field interviewers and survey techs approved by SRC. The base pay rate to field interviewers did not impact the projections as we had already been projecting very near those rates.

In addition, they also include:

\$2/hour differential for all field interviewers and team leaders for this wave.
 An additional \$3/hr on top of the \$2 for those that will do screening.

We applied the new hourly rates in our cost reporting system based on the recruiting situation as it stands now and will adjust once we finish the recruitment process:

-- New hire average rates were determined based on the updated home area rates and how many we are targeting to hire in each home area.

--On-staffers currently assigned to the project have already received the rate increase and were informed of the differentials. We are using the average rate of current on-staffers even though this recruitment effort is ongoing.

--Team leaders' rates were set at an average of the current team leaders assigned to the project already while recruitment of additional team leaders continues.

In addition to pay rate differentials, field staff are offered a production bonus of \$400, paid after certain production goals are met. Projections include the payments of production bonuses.

Also, the projected fringe benefit rate used for contingent employees in SRO increased in November from 7.65% to 10.4%, which added to the overall cost projections.

Projections
Nov 08, 2021

Dollars Projected For Month: 338,089.81
Actual Dollars Used: 183,780.90
Variance (Projected minus Actual): 154,308.91
Reason For Variance:

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:	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample.												
SRO Project Period	02/2021 - 01/2024												
Data Col Period	03/2022 - 01/2024												
Security Plan	NA												
Milestone Dates	<table border="1"> <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:													
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	Oct, 2021 (HRS2022-NewCohort)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	Sampling/Listing: The team finished with the 98 high priority segments in late September identifying 37 segments to be listed. 24 listers were trained in a four hour Zoom training on 10/16 by Theresa, Andrew and Millie. 19 segments were listed in October. Address sorting of the 806 low priority segments continued in October. The staff sorted 185 segments in October. One (field) sorter resigned from the organization. Andrew created a report to see how long the sorting was taking and it was clear that additional resources are needed to try and complete the sorting by mid-December. Andrew trained Mark Nathin (student in DMSS) in October to sorting addresses. There is a training		

planned in November for three additional resources (1-SSL and 2-field).

IRB: Nothing new to report.

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. The 500 control cases that are being worked as normal (by interviewers only) were mailed their invitation on 10/29.

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.

Due to some issues with the interviewer-administered version of the screener, the web version was delayed a bit. There was an initial version to test at the end of October. Due to some issues found during testing web screening will not be launched until early November. The team is considering asking field staff for availability past the current planned end of the pretest to see how many might be available to do some non-response follow-up of the 1,000 cases that do not respond via web. 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 main 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. Andrew set-up the Tango account and completed the paperwork for the ISR Business Office. Due to the delay in the web screener we have instructed the ISR BO to not wire the money to the Tango account since HSIP wants the amount reconciled within 45 days. We will notify the ISR BO in November about wiring the money to pay respondents who are eligible for an electronic gift code.

Special Issues

Cost

Total Cost to Date (Direct + Indirect):	825,781.14
Estimated Cost at Completion (E\$AC):	24,721,879.32
Total Budget:	24,277,856.00
Variance (Budget minus E\$AC):	-444,023.32

Reason For Variance:

The HRS 2022 New Cohort project includes the recent base pay increases to field interviewers and survey techs approved by SRC. The base pay rate to field interviewers did not impact the projections as we had already been projecting very near those rates.

In addition, they also include:

\$2/hour differential for all field interviewers and team leaders for this wave.
An additional \$3/hr on top of the \$2 for those that will do screening.

We applied the new hourly rates in our cost reporting system based on the recruiting situation as it stands now and will adjust once we finish the recruitment process:

-- New hire average rates were determined based on the updated home area rates and how many we are targeting to hire in each home area.

--On-staffers currently assigned to the project have already received the rate increase and were informed of the differentials. We are using the average rate of current on-staffers even though this recruitment effort is ongoing.

--Team leaders' rates were set at an average of the current team leaders assigned to the project already while recruitment of additional team leaders continues.

In addition to pay rate differentials, field staff are offered a production bonus of \$400, paid after certain production goals are met. Projections include the payments of production bonuses.

Also, the projected fringe benefit rate used for contingent employees in SRO increased in November from 7.65% to 10.4%, which added to the overall cost projections.

Projections

Dollars Projected For Month: 501,882.51
Actual Dollars Used: 231,862.54
Variance (Projected minus Actual): 270,019.97
Reason For Variance:

Measures

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

Other Measures

Project Name	(LSA Space Survey) LSA Space Survey																						
Project Mode	Primary: Web Total of Modes: 1																						
Project Type	Sponsored Projects	Project Status	Current																				
Budget	Direct Budget: 7,755.00	Indirect Budget: 0.00	Total Budget: 7,755.00																				
Principal Investigator/Client	Linda Tesar (U-M, LS&A) Daniel Rife (U-M, LS&A)																						
Funding Agency	LS&A internal funds																						
IRB	HUM#:	Period Of Approval:																					
Project Team	Project Lead:	William Keating																					
	Budget Analyst:	Dean E Stevens																					
	Production Manager:																						
	Senior Project Advisor:	Grant D Benson																					
	Production Manager:																						
	Production Manager:																						
Proposal #:	no data																						
Description:	LSA is looking to field a web survey to undergraduate students, graduate students, staff, and faculty in LSA to better understand attitudes around space usage.																						
SRO Project Period	10/2021 - 01/2022																						
Data Col Period	11/2021 - 12/2021																						
Security Plan	NA																						
Milestone Dates	<table> <tr> <td>PreProduction Start:</td> <td>10/18/2021</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>11/03/2021</td> <td>DC End:</td> <td>11/30/2021</td> </tr> </table>			PreProduction Start:	10/18/2021	Pretest Start:		Pretest End:		Recruitment Start:		Staffing Completed:		GIT Start:		SS Train Start:		SS Train End:		DC Start:	11/03/2021	DC End:	11/30/2021
PreProduction Start:	10/18/2021	Pretest Start:																					
Pretest End:		Recruitment Start:																					
Staffing Completed:		GIT Start:																					
SS Train Start:		SS Train End:																					
DC Start:	11/03/2021	DC End:	11/30/2021																				
Other Project Team Members:	Paul Burton																						
Other Project Names:																							
Sample Mgmt Sys	NA																						
Data Col Tool	Other (Qualtrics)																						
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	Oct, 2021 (LSA Space Survey)	Project Phase	Initiation										
Risk Level	On Track												
Monthly Update	We set up the project and created 4 surveys in Qualtrics. Surveys plus contact protocol sent to PI who was reviewing them. We also received sample file of faculty, staff, grad students and undergraduate students. Paul eliminated duplicates according to PI specifications and randomly sampled from the undergraduate file.												
Special Issues	Very tight timeline for development and fielding period												
Cost	<table> <tr> <td>Total Cost to Date (Direct + Indirect):</td> <td>1,245.47</td> </tr> <tr> <td>Estimated Cost at Completion (E\$AC):</td> <td>7,700.00</td> </tr> <tr> <td>Total Budget:</td> <td>7,755.00</td> </tr> <tr> <td>Variance (Budget minus E\$AC):</td> <td>55.00</td> </tr> <tr> <td>Reason For Variance:</td> <td>Less sampling cost than expected</td> </tr> </table>			Total Cost to Date (Direct + Indirect):	1,245.47	Estimated Cost at Completion (E\$AC):	7,700.00	Total Budget:	7,755.00	Variance (Budget minus E\$AC):	55.00	Reason For Variance:	Less sampling cost than expected
Total Cost to Date (Direct + Indirect):	1,245.47												
Estimated Cost at Completion (E\$AC):	7,700.00												
Total Budget:	7,755.00												
Variance (Budget minus E\$AC):	55.00												
Reason For Variance:	Less sampling cost than expected												

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>	0		0	
<i>Goal at Completion:</i>	1242		10	
<i>Current actual:</i>	0		0	
<i>Estimate at Complete:</i>	1242		10	
<i>Variance:</i>	0		0	

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 Oct, 2021 (MARS 2) **Project Phase** Initiation

Risk Level On Track

Monthly Update MARS 2 face to face data collection has resumed. In early October, the University of Malaya resumed full operations and granted approval for the project to conduct fieldwork and travel. The SWRC team held a virtual interviewer training October 4-8 to expand their team and increase production quickly. Some travel restrictions remain in place, so the SWRC team continues to work with the local governments for travel permits when necessary. Interviewers will be following up with respondents who have already completed a telephone survey in order to collect physical measurements, in addition to screening new households.

In anticipation of the resumption of work, SRO and SWRC met to revise the project timeline. Our new expected end of data collection is February 28, 2022 with March 2022 devoted to project wrap-up and final data delivery. We will continue to meet monthly, with the SWRC team sending bi-weekly progress updates and reaching out when they have questions or need support. The SWRC team has reported their next steps are to submit an HCAP proposal, with hopes of beginning that data collection in early 2023.

Special Issues None

Cost
Nov 16, 2021

Total Cost to Date (Direct + Indirect):	220,045.48
Estimated Cost at Completion (E\$AC):	236,972.09
Total Budget:	254,702.00
Variance (Budget minus E\$AC):	17,729.91
Reason For Variance:	Original savings due to cancellation of international travel.

Projections
Nov 16, 2021

Dollars Projected For Month:	8,187.13
Actual Dollars Used:	5,422.42
Variance (Projected minus Actual):	2,764.71
Reason For Variance:	Fewer hours charged for data management, help desk support, and project management (Jay Lin; only worked 3/4 of month).

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	Oct, 2021 (MI CReSS)	Project Phase	Initiation
Risk Level	Some Concerns		
Monthly Update	<p>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 hard to fast track the pre-production/development timeline as much as possible.</p> <p>On 11/18 we will freeze the instrument and systems for our trainings that begin the week of November 29 (right after the Thanksgiving holiday break).</p>		
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			
Nov 05, 2021	Total Cost to Date (Direct + Indirect):	43,877.18	
	Estimated Cost at Completion (E\$AC):	654,507.91	
	Total Budget:	668,484.00	
	Variance (Budget minus E\$AC):	13,976.09	
	Reason For Variance:	We continue to update our projections based on project needs and resource availability.	
Projections			
Nov 05, 2021	Dollars Projected For Month:	36,161.87	
	Actual Dollars Used:	25,254.89	
	Variance (Projected minus Actual):	10,906.98	
	Reason For Variance:	All TSG project team members worked less hours than projected based on availability. We continue to address challenges with resource availability.	

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

Risk Level	On Track
-------------------	----------

Monthly Update	<p>October updates</p> <ul style="list-style-type: none"> - Continued with pre production tasks for the Base Year 2022 (Training, technical system updates). - We have begun to hold weekly team (SRO) meetings to monitor progress against tasks and share information. - Hueichun is working with CMT to load a server with the latest version of illume and create/test new production environment. - 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		
Nov 16, 2021	<p>Total Cost to Date (Direct + Indirect):</p> <p>Estimated Cost at Completion (E\$AC):</p> <p>Total Budget:</p> <p>Variance (Budget minus E\$AC):</p> <p>Reason For Variance:</p>	<p>5,841,009.37</p> <p>6,862,701.96</p> <p>7,316,931.00</p> <p>454,229.04</p> <ul style="list-style-type: none"> - 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 (2020-2021) - 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 (2021-2022) Current projections assume a 50/50 split between remote and in-person survey administrations in schools. We will not know until January 2022 if a school prefers the survey to be conducted in-person or remote. A change in the balance between remote and in-person will have affect interviewer hours and travel costs - the over run could be larger than currently projected.

Projections		
Nov 16, 2021	<p>Dollars Projected For Month:</p> <p>Actual Dollars Used:</p> <p>Variance (Projected minus Actual):</p> <p>Reason For Variance:</p>	<p>54,260.73</p> <p>34,723.75</p> <p>19,536.98</p> <p>Illume license fees were due to be paid in October but these will now be paid in November. Salary costs were slightly lower than projected.</p>

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

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 Oct, 2021 (MTF Panel (main data collec **Project Phase** Implementing

Risk Level On Track

Monthly Update Data manager: The data collection ended on 10/31/2021.

Production Data: as of 10/31/2021
 Total Sample: 21589
 Total completes: 9406
 Response Rate: 43.57%

Special Issues

Cost
Oct 31, 2021

Total Cost to Date (Direct + Indirect):	1,043,648.80
Estimated Cost at Completion (E\$AC):	1,101,354.32
Total Budget:	1,135,001.00
Variance (Budget minus E\$AC):	33,646.68
Reason For Variance:	The amount of underrun will be adjusted in November.

Projections
Oct 31, 2021

Dollars Projected For Month:	30,976.81
Actual Dollars Used:	37,609.24
Variance (Projected minus Actual):	-6,632.43
Reason For Variance:	The amount of overrun will be adjusted in November.

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:** 832,983.88 **Indirect Budget:** 466,470.97 **Total Budget:** 1,299,454.85

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 Oct, 2021 (PSID TAS 2021) **Project Phase** Implementing

Risk Level On Track

Monthly Update In Week 7 TAS exceeded the cumulative goal of 787 by 240 interviews for a total of 1027 interviews and 62.2% completion rate. The 2021 completion rate outpaces 2019 by around 9pp.

As of 11/14 Release 1 (n = 1428) has completed its 6-week long web-phase during which around 3/4 of the sample with appropriate contact info has received email and text messages but no outbound calls from the interviewers. The

remaining quarter of the sample with insufficient contact information has been assigned to interviewers to call family members and CPs to obtain contact info for R. Interviewers are making good progress on the more difficult assigned sample as of 11/6 it was about 20% completed.

Release 1 completed the Web Special Offer in which Rs were offered extra tokens of \$10 or \$20 at random for completing by 11/14. Approximately 200 respondents completed during that time representing a 34% response rate for this initiative.

Release 2 (n = 224) was launched on 10/27, it is now receiving email/text reminders and will enter Web Special Offer on 11/29 and non-response follow up before the holidays.

TAS filed and had received an approval for an ORIO. The TAS sample releases include Rs who turn 18 during 2003 but may not turn 18 until after the releases are activated. TAS accidentally sent invitations and reminders to Rs who were not yet 18 which resulted in 23 respondents completing before turning 18. TAS proposed and accepted remedy included re-consenting Rs once they turn 18. Of 11 respondents who turned 18, so far 5 were reconsented and had no concerns with their early participation.

Release 3 (n = 460) was delivered by the PSID staff a bit earlier than expected and may be released on 12/1 which would be 2 weeks earlier than expected.

Technical systems are working well with intermittent slowness of DCA and some reoccurring instances requiring sync reset. Programming continues to clean up some bugs but most of the MSMS protocol is operating smoothly including review processes and the new ways of coordinating the study protocol.

Special Issues

Cost
Nov 16, 2021

Total Cost to Date (Direct + Indirect):	363,330.96
Estimated Cost at Completion (E\$AC):	1,365,138.65
Total Budget:	1,299,454.85
Variance (Budget minus E\$AC):	-65,683.80
Reason For Variance:	Adjustments to interviewer pay rates.

Projections
Nov 16, 2021

Dollars Projected For Month:	115,187.71
Actual Dollars Used:	121,372.29
Variance (Projected minus Actual):	-6,184.58
Reason For Variance:	Some incorrectly billed time was billed back to TAS thus producing an overrun.

Measures

	Units Complete	RR	HPI
Current Goal:	787	47.6%	n/a
Goal at Completion:	2332	88%	n/a
Current actual:	1027	62.2%	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	Oct, 2021 (PSID21)	Project Phase	Implementing
----------------------	--------------------	----------------------	--------------

Risk Level	<i>Some Concerns</i>
-------------------	----------------------

Monthly Update Below is the Production variance to goals for all weeks in October. We missed goal in 3 of the 4 weeks.

WK

30	10/3/2021 - 10/9/2021	6
31	10/10/2021 - 10/16/2021	-4
32	10/17/2021 - 10/23/2021	-4
33	10/24/2021 - 10/30/2021	-21

Phase 1 of the hours-based iwer bonus plan continued. The PIs approved Phase 2 on 11/11.

Interventions in October included:

Wk

30 Switched Eng CATI First to Phone/Web--batch email w/ link sent
 30 Sent batch email and text to Term Bird Rep 1 Controls (n<326)
 30 Sent Mode Switch letter to Mode Switched cases (n~602)
 32 Concluded Terminal Bird Rep 1: (9/29 -)10/20
 32 Sent Splitoff email invites to SO batches being worked to-date and still non-final: 10/22 - 11/1
 33 Launched Terminal Bird Rep 2: 10/27 (- 11/17)
 33 English Splitoff Texts sent to SO batches being worked to-date and still non-final

As Terminal Bird Replicate 1 concluded successfully, TB Replicates 2 and 3 were planned.

CDS and HRS trainings diverted some resources from PSID Core: CDS Training: 10/28 - 11/4, HRS Training: 10/25 - 10/27

Technical work in October included:

--Use of the new ADT to BDBx utility to reconstruct iws
 --Work on processes to reset interviews
 --Production of 68ID report
 --Development of processes to collect missing lw Obs
 --Tech updates required to interventions (e.g. TB Rep 1 End and 2 templates)
 --Data delivery processes stalled frequently during daily runs.

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

Special Issues

Cost	Total Cost to Date (Direct + Indirect):	5,689,229.36
Oct 31, 2021	Estimated Cost at Completion (E\$AC):	7,375,195.66
	Total Budget:	6,887,423.00
	Variance (Budget minus E\$AC):	-487,772.66
	Reason For Variance:	We have a small decrease to the projected overrun due to lower interviewer hours. However, this was partially offset by higher TSG hours. Note: FTF planning is underway and we have not yet added travel cost projections.

Projections
Oct 31, 2021

Dollars Projected For Month:

561,909.42

Actual Dollars Used:

546,389.79

Variance (Projected minus Actual):

15,519.63

Reason For Variance:

In October, we projected to spend \$360K direct cost and actually spent \$353K, for a monthly direct cost underrun of \$7K. There were a variety of small underruns in Telephone and Post Collection Processing hours, offset slightly by small TSG overruns.

Measures

	Units Complete	RR	HPI
Current Goal:	7933	73.7%	7.4
Goal at Completion:	9033	84%	7.7
Current actual:	7911	73.5%	7.4
Estimate at Complete:	9033	83.5%	7.8
Variance:	0	0	.3

Other Measures

All Measures are reported through the last completed week (through 11/13). 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 Oct, 2021 (SCA 2021) **Project Phase** Initiation

Risk Level On Track

Monthly Update SCA OCT began as scheduled on WED 9/29 and ended as scheduled on MON 10/25. We completed 604 IWs (324/180/100), 4 IWs above our goal of 600 (320/180/100) at a cumulative hpi of 3.06. 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**

Nov 05, 2021

Total Cost to Date (Direct + Indirect): 927,945.98
Estimated Cost at Completion (E\$AC): 1,125,482.69
Total Budget: 1,122,582.00
Variance (Budget minus E\$AC): -2,900.69
Reason For Variance: ST salary increases effective 10/3/2021

Projections

Nov 05, 2021

Dollars Projected For Month: 106,770.86
Actual Dollars Used: 100,750.51
Variance (Projected minus Actual): 6,020.35
Reason For Variance: Reduced hpi

Measures

	Units Complete	RR	HPI
Current Goal:	600		3.0
Goal at Completion:	600		3.0
Current actual:	604		3.06
Estimate at Complete:	604		3.06
Variance:	+4		+.06

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><tr><td>PreProduction Start:</td><td>08/15/2021</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>10/13/2021</td><td>DC End:</td><td>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	Oct, 2021 (SCIP 2021)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	All three campuses are now in production. Ann Arbor has met all goals. Dearborn and Flint are both very close. We will not send any more reminders to Ann Arbor sample. One final reminder may be sent to Dearborn, as they still are not quite at goal. All reminder emails are distributed through Qualtrics. The \$5 incentive has been introduced there. Flint is due for a 3rd reminder that will go out next week, unless we meet goal prior to then. The \$5 incentive was introduced at the last (2nd) email reminder. \$100 lottery winners are selected only one per day, in order to comply with the state of Michigan lottery laws. Amazon gift codes will go out to winners once all are selected. One in		

100 respondents will have the chance to win a \$100 gift code. \$5 incentives will go out this week to all respondents who qualify and have completed. The overall RR for all students, faculty, and staff from the three campuses is currently 26.1. Ann Arbor RR is 27.2 with all subgroups except staff at or above goal. Dearborn RR is 25.3, and Flint RR is 29.2. The PI's are very happy with the outcome thus far. Data collection will end before the Thanksgiving break. Weighting will begin once we return in December.

Special Issues

The PIs are requesting the underrun amount back, so they can fund a graduate student to do analyses on the data. We are working with SRO and the PI BA to accommodate this request, ensuring all projections are as tight as possible.

**Cost
Nov 16, 2021**

Total Cost to Date (Direct + Indirect):	10,157.69
Estimated Cost at Completion (E\$AC):	75,842.77
Total Budget:	136,813.00
Variance (Budget minus E\$AC):	60,970.23
Reason For Variance:	Project was over-funded, small number of staff on project who are not able to charge all hours.

**Projections
Nov 16, 2021**

Dollars Projected For Month:	11,047.96
Actual Dollars Used:	5,612.95
Variance (Projected minus Actual):	6,721.70
Reason For Variance:	Small number of staff on project who are not able to charge all hours. - Will finish updating monthly costs once BA provides information needed.

Measures

	Units Complete	RR	HPI
Current Goal:	6,860	27%	
Goal at Completion:	6,860		
Current actual:	6,636	26.1	
Estimate at Complete:	6,860		
Variance:			

Other Measures

Project Name	(SRS 2022) Social Relations 2022																								
Project Mode	Primary: Face to Face		Total of Modes: 1																						
Project Type	Sponsored Projects		Project Status	Current																					
Budget	Direct Budget:	2,881,925.00	Indirect Budget:	1,613,877.00	Total Budget: 4,495,802.00																				
Principal Investigator/Client	Toni Antonucci (ISR) Kristine Ajrouch (ISR) Laura Zahodne (ISR)																								
Funding Agency	NIH																								
IRB	HUM#:		Period Of Approval:																						
Project Team	Project Lead:		Barbara Lohr Ward																						
	Budget Analyst:		Parina Kamdar																						
	Production Manager:		Veronica Connors-Burge																						
	Senior Project Advisor:		Kirsten Haakan Alcser																						
	Production Manager:		Ian Ogden																						
	Production Manager:		Lisa Van Havermaet																						
Proposal #:	no data																								
Description:	Conduct 3400 interviews with respondents aged 35 years or older residing in the tri-county area of Southeast Michigan (Wayne, Oakland and Macomb counties) and 244 interviews with Social Relations sample members aged younger than 65 years of age. The project involves screening up to 6900 new sample lines., with one selected respondent per household. 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 (height, weight, blood pressure, grip strength) and saliva collection. The SRS 2022 project will use the same instrument programmed for the D-Amp project, with the only new programming being that for a screener. The screener will be translated into Arabic. No informant or proxy interview is included in the project scope. Interviews will be conducted in English or Arabic.																								
SRO Project Period	09/2021 - 05/2023																								
Data Col Period	05/2022 - 03/2023																								
Security Plan	NA																								
Milestone Dates	<table><tr><td>PreProduction Start:</td><td>09/01/2022</td><td>Pretest Start:</td><td></td></tr><tr><td>Pretest End:</td><td></td><td>Recruitment Start:</td><td>01/15/2022</td></tr><tr><td>Staffing Completed:</td><td></td><td>GIT Start:</td><td></td></tr><tr><td>SS Train Start:</td><td></td><td>SS Train End:</td><td></td></tr><tr><td>DC Start:</td><td></td><td>DC End:</td><td>03/31/2023</td></tr></table>					PreProduction Start:	09/01/2022	Pretest Start:		Pretest End:		Recruitment Start:	01/15/2022	Staffing Completed:		GIT Start:		SS Train Start:		SS Train End:		DC Start:		DC End:	03/31/2023
PreProduction Start:	09/01/2022	Pretest Start:																							
Pretest End:		Recruitment Start:	01/15/2022																						
Staffing Completed:		GIT Start:																							
SS Train Start:		SS Train End:																							
DC Start:		DC End:	03/31/2023																						
Other Project Team Members:	Ian Ogden, Lisa Van Havermaet, Steven Sonoras, Veronica Connors-Burge, Taghreed Lovell, Jeff Smith (Tech Lead), others TBD																								
Other Project Names:	Social Relations 2022, DAWN																								
Sample Mgmt Sys	SurveyTrak																								
Data Col Tool	Blaise 4.8																								
Hardware	Laptop; [UM cell] Phone; Paper and Pencil																								
DE Software	Other (Weblog)																								
QC Recording Tool	DRI-CARI																								
Incentive	Yes, R																								
Administration	SRO Group																								
Payment Type	Cash, prepaid (\$70)																								
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)																								

Report Period	Oct, 2021 (SRS 2022)	Project Phase	Planning
----------------------	----------------------	----------------------	----------

Risk Level	Some Concerns
-------------------	---------------

Monthly Update

During October 2021, SRC activities included the following:

Task 1: Management, Budget and Work Plan

- Updated labor and non-labor projections, incorporated new hourly rates for interviewers and projection for ACA

spending

- Began review of training agenda, considering plans for merging projects and conducting a single training for both D-Amp and SRS.
- Continued work to finalize staffing for the project
- Stored donated study supplies
- Began review of D-Amp technical systems documentation in preparation for re-starting the study technical systems.

Task 2: Sampling

- Began initial work to develop a merged sample (SRS plus D-Amp)

Task 3: Questionnaire Development

- No activity this month

Task 4: CAI Programming

- Discussed project staffing, programming needs

Task 5: Systems Programming

- Discussed project staffing, programming needs

Tasks 6, 7: Interviewer Recruitment & Hiring, Training

- Discussed joint training plans for D-Amp and SRS
- Conducted outreach and set up site visit for UM Dearborn
- Began reviewing D-Amp pilot training powerpoint slides and creating training documentation

Task 8: Main Data Collection

- No activity this month

Task 9: Post Collection Processing

- No activity this month

Task 10: Weighting

- No activity this month

Task 11: Final Data Deliverables

- No activity this month

Special Issues

Areas of Concern (changes shown in italics):

- The budget was prepared prior to understanding the full D-Amp work scope, and training is under-budgeted compared to the current understanding of the project work scope. SRS was budgeted for five days of training, inclusive of Arabic training. The current D-Amp training is six+ days of training plus ½ day of Arabic training, resulting in a scope/budget mismatch. This unanticipated cost could be offset by lower facility costs due to using the training facility at UM Dearborn, as well as not having interviewers stay in a hotel during training.
- The project budget anticipated the use of 17 on-staff interviewers and 30 new hires. Due to timing (delays due to the COVID-19 pandemic), the project will not have the use of on-staff interviewers. This will increase training costs since more new hires will need to go through GIT.
- The SRS budget does not include informant interviews or proxy interviews. This is an area of scope that needs to be reconciled with the current D-Amp survey work scope.
- The project management budget is extremely lean and may not be adequate for a project of this size and complexity.

Cost
Nov 15, 2021

Total Cost to Date (Direct + Indirect):	20,663.21
Estimated Cost at Completion (E\$AC):	4,556,563.89
Total Budget:	4,495,802.00
Variance (Budget minus E\$AC):	-60,761.89
Reason For Variance:	Cost increases related to increases in interviewer rates and the ACA resulted in an overrun.

Projections
Nov 15, 2021

Dollars Projected For Month:	17,346.34
Actual Dollars Used:	8,071.20
Variance (Projected minus Actual):	9,275.00
Reason For Variance:	Pre-production activities did not start, pending decisions by the research team on merging SRS and D-Amp.

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	(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	Oct, 2021 (STARRS-LS Waves 3 & 4)	Project Phase	Implementing
----------------------	-----------------------------------	----------------------	--------------

Risk Level	<i>Some Concerns</i>
-------------------	----------------------

Monthly Update	<ul style="list-style-type: none"> <input type="checkbox"/> We have released eight replicates (8,416 sample lines) and completed 6,080 interviews as of November 3. <input type="checkbox"/> We created a special report that shows safety plan activations against interviews by week and shared it with the ODUSA in response to their questions about safety plan activation numbers. <input type="checkbox"/> We continued bi-weekly meetings with the ODUSA to coordinate Safety Plan and respondent locating activities. <input type="checkbox"/> We learned that USUHS would like to receive the Year 3 budget by November 19. <input type="checkbox"/> We began updating the document that describes U-M's projected overrun. When completed, the updated document will be shared with the PIs. <input type="checkbox"/> We worked on budgeting activities that arose from the September 14 GSC meeting: <ul style="list-style-type: none"> <input type="checkbox"/> Rebudget Wave 4 for 18 months instead of 24. <input type="checkbox"/> Budget for creating W4 public use deliverables. This is new scope/not in the current budget. <input type="checkbox"/> Budget for adding SHOS-A Cases to the LS sample. This is also new scope/not in the current budget. <input type="checkbox"/> We worked on the sample file for SHOS-A cases and coordinated locating activities with the ODUSA. <input type="checkbox"/> IRB: <ul style="list-style-type: none"> <input type="checkbox"/> A STARRS-LS Continuation amendment, which includes the Privacy Notice and addition of SHOS-A Cases to LS sample, was submitted to the U-M IRB. <input type="checkbox"/> We consulted with the IRB about the upcoming realignment of the ODUSA with the OASA (M&RA) and timing of implementation of the change and notification to the IRB. <input type="checkbox"/> We started planning for the Annual Security Training Renewal for the Enclave. <input type="checkbox"/> We began coordinating with the ODUSA on the Annual Security Controls Review. <input type="checkbox"/> The Enclave team worked on server hardware replacement for the Enclave Windows environment, updates to Great Lakes Cluster infrastructure, and on issues related to delays in the background check process. <input type="checkbox"/> We continued work on biomarker group requests for assistance, including transferring NSS-NC data to Boston Children's Hospital.
-----------------------	---

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.
 - To date, our projected costs for Waves 3 and 4 are higher than anticipated (see Table 4). Areas for the increased cost estimates include a longer survey instrument time for CATI, and increased hours for programming instrument changes. In addition, this month, our projected costs were augmented by an increase in SRO interviewer base pay rates. We are monitoring the situation closely and are updating our analysis of the areas in our budget where we are projecting a deficit. When completed, this updated document will be shared with the PIs.
- Wave 3 Challenges
 - o Wave 3 consent review and approval process – these risks were described in a September 30, 2020 memo to the ODUSA.
 - The DHA Privacy Board has approved the DSA modification for the MHS HIPAA form; however, we will not receive any sort of VA prior approval. With the VA, we could be in a situation where we employ a VA HIPAA authorization form that ends up not being acceptable to the VA when it comes time to request health records data for linkage. While unlikely, it's also possible the approved MHS HIPAA form might not be acceptable to the providers of those data.
 - The risk related to the VA not having reviewed the HIPAA form prior to production was highlighted in the June 15 GSC meeting when a question was raised as to whether the VHA HIPAA consent language would allow access to VBA data.
- Enclave Support
 - o We continue to monitor priorities for Enclave support. We balance the primary Enclave support work with a number of more complex biomarker data support requests, which are outside of the reduced Enclave team scope in the STARRS-LS contract. We prioritize the primary work above other requests in accordance with project goals and to remain within budget/scope. As a result, the biomarker data support requests can take longer to service. As long as requestors are ok with this arrangement, we can continue to manage the work and priorities in this fashion.
- Scope additions
 - o There are a few cost estimates for new scope that have yet to be made (Table 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):	3,298,545.00
Estimated Cost at Completion (E\$AC):	13,409,052.00
Total Budget:	12,809,390.00
Variance (Budget minus E\$AC):	-599,662.00
Reason For Variance:	

. Our projected deficit for the total five-year project increased considerably this month (to \$599,662 from last month's \$433,984) due to an increase in SRO interviewer base pay rates. After conducting a review of SRO area rates with market area rates, SRO found that on average it was underpaying interviewers. In addition, other firms that employ interviewers are employing aggressive hiring strategies. In order to retain existing staff, recruit new hires and remain competitive within the market, SRO received approval from SRC to move forward with updating its interviewer base pay rates. Projects, including STARRS, learned of the rates increase at the end of September and the full impact on the budget became available in late October. We are updating the document that describes U-M's projected overrun and will share it with the PIs when completed.

Projections

Dollars Projected For Month:	269,438.00
Actual Dollars Used:	238,569.00
Variance (Projected minus Actual):	30,869.00
Reason For Variance:	

Variance mostly due to how projections for respondent payments hit our accounts.

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	(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

Oct, 2021 (VCT)

Project Phase

Closing

Risk Level

On Track

Monthly Update

POQ has rejected the first findings paper. The team is reviewing the comments, will be making edits and submitting to a different journal.

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):	362,194.41
Estimated Cost at Completion (E\$AC):	377,219.48
Total Budget:	377,455.00
Variance (Budget minus E\$AC):	235.52

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:

77.35

Variance (Projected minus Actual):

-77.35

Reason For Variance:

Kallan charged time for a meeting to discuss the reviews from POQ.

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 Oct, 2021 (WCJ -Remote Pilot) **Project Phase** Initiation

Risk Level *On Track*

Monthly Update

Project Management:

- Continue to communicate with the PI team and the SRO Admin team on budget
- Started getting related materials from other projects as references.
- Continue the dialogue between the TSG admin, programmers, and the project team.

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
- Continue to test the instrument

Special Issues

Cost

Oct 31, 2021

Total Cost to Date (Direct + Indirect):	11,111.95
Estimated Cost at Completion (E\$AC):	94,263.95
Total Budget:	102,139.00
Variance (Budget minus E\$AC):	7,875.05
Reason For Variance:	the project is in developmental phase- preparing for the pretest. The amount of the underrun will be adjusted in November.

Projections

Oct 31, 2021

Dollars Projected For Month:	11,516.24
Actual Dollars Used:	7,054.54
Variance (Projected minus Actual):	4,461.70
Reason For Variance:	the project is in developmental phase- preparing for the pretest. The amount of the underrun will be adjusted in November.

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	Oct, 2021 (WMH-Qatar)	Project Phase	Closing
Risk Level	On Track		
Monthly Update	The SRC team wrapping up work on this task.		
Special Issues	None		

Cost
Nov 16, 2021

Total Cost to Date (Direct + Indirect): 71,722.54
Estimated Cost at Completion (E\$AC): 72,219.82
Total Budget: 74,928.00
Variance (Budget minus E\$AC): 2,708.18
Reason For Variance: Saving dollars for unexpected support during production.

Projections
Nov 16, 2021

Dollars Projected For Month: 615.41
Actual Dollars Used: 455.76
Variance (Projected minus Actual): 159.65
Reason For Variance: no more tasks assigned.

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

October 2021



Developmental Initiatives

TSME 22-Blaise 5 Testing

TSME22-Day in the Life Videos





























































TSME22-DCO Tech System Support

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	Oct
TSME 22-Blaise 5 Testing (423562)	Initiatives	Current	Gina-Qian Yang Cheung										
TSME22 Day in the life of Video	Initiatives	Current	Vivienne Y Outlaw										
TSME22 DCO Tech System Support FY22	Initiatives	Current	Vivienne Y Outlaw										
TSME22-QC-Systems (483249)	Initiatives	Current	Sarah Elisa Broumand										
TSME22-SelfSchedUI (483424)	Initiatives	Current	Andrew L Hupp										
TSME22-ST international (483227)	Initiatives	Current	Gina-Qian Yang Cheung										

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 Oct, 2021 (TSME 22-Blaise 5 Testing (423562)) **Project Phase** Initiation

Risk Level On Track

Monthly Update Not too much work has been done

Special Issues

Cost *Total Cost to Date (Direct + Indirect):* 2,920.10

Nov 05, 2021 *Estimated Cost at Completion (E\$AC):* 34,307.96

Total Budget: 30,000.00

Variance (Budget minus E\$AC): -4,307.96

Reason For Variance: No resources

Projections
Nov 05, 2021

Dollars Projected For Month: 461.13
Actual Dollars Used: 1,038.18
Variance (Projected minus Actual): -577.05
Reason For Variance: No resources

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:* 12,500.00 *Indirect Budget:* 0.00 *Total Budget:* 12,500.00

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 Oct, 2021 (TSME22 Day in the life of Vi **Project Phase** Implementing

Risk Level On Track

Monthly Update In October about 80% of the filming was completed and editing work was started. The remainder of the filming will be done before the end of the calendar year with plans to completed the project in early Jan 2022.

Special Issues

Cost *Total Cost to Date (Direct + Indirect):* 3,509.76

Nov 16, 2021 *Estimated Cost at Completion (E\$AC):* 8,359.35

Total Budget: 12,500.00

Variance (Budget minus E\$AC): 4,140.65

Reason For Variance: It is not key known the total time for final editing and voice over.

Projections
Nov 16, 2021

Dollars Projected For Month: 3,086.10
Actual Dollars Used: 3,215.02
Variance (Projected minus Actual): -128.92
Reason For Variance: more time spent filming and editing than anticipated

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 Oct, 2021 (TSME22 DCO Tech System **Project Phase** Initiation

Risk Level Some Concerns

Monthly Update Create consolidated Inventory report (joining inventory records in Fred and in Mike's db)
Add special features for suppressing automatic emails from project closure
Met to discuss the FOTI 2022 work specs

Special Issues

Cost *Total Cost to Date (Direct + Indirect):* 10,005.61

Nov 16, 2021 *Estimated Cost at Completion (E\$AC):* 30,757.41

Total Budget: 30,000.00

Variance (Budget minus E\$AC): -757.41

Projections
Nov 16, 2021

Reason For Variance:

DCO support for the first of the year check-in and updates to support project needs were greater than supported by the budget.

Dollars Projected For Month:

2,099.15

Actual Dollars Used:

2,178.51

Variance (Projected minus Actual):

-79.36

Reason For Variance:

DCO support for the first of the year check-in and updates to support project needs were greater than anticipated

Measures

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

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 Oct, 2021 (TSME22-QC-Systems (4832 **Project Phase** Implementing

Risk Level On Track

Monthly Update Team working on developing specification document for adding the inter-rater reliability function in OLIVE. Currently key members are busy with PROD project work and the plan is to rebalance the hours to start working on QC system task and spending the funds in January.

Special Issues

Cost *Total Cost to Date (Direct + Indirect):* 7,750.95

Oct 31, 2021 *Estimated Cost at Completion (E\$AC):* 28,037.01

Total Budget: 30,000.00

Variance (Budget minus E\$AC): 1,962.99

Reason For Variance: na

Projections
Oct 31, 2021

Dollars Projected For Month: 3,188.70
Actual Dollars Used: 1,348.76
Variance (Projected minus Actual): 1,839.94
Reason For Variance: Team members have been busy with other PROD project priorities. Will rebalance hours.

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

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

Other Project 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 Oct, 2021 (TSME22-SelfSchedUI (4834 **Project Phase** Planning

Risk Level On Track

Monthly Update Peter made edits to Spanish based on feedback from the PSID Spanish testing Camila is conducting.

Nothing to report yet on the work to be done. The remaining work on the self-scheduler is dependent on MSMS work prior. Andrew will discuss with the SRO MSMS dev priority review group about where this development is in priority (right now it's not high). Andrew will project time for Peter towards the end of the fiscal year for now.

Special Issues

Cost

Total Cost to Date (Direct + Indirect): 919.55
Estimated Cost at Completion (E\$AC): 9,927.32
Total Budget: 10,000.00
Variance (Budget minus E\$AC): 72.68
Reason For Variance:

Projections

Dollars Projected For Month: 0.00
Actual Dollars Used: 84.57
Variance (Projected minus Actual): 84.57
Reason For Variance: Peter charged ~1 hour of time for a Spanish self-scheduler issue.

Measures

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

Other Measures

Project Name	(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	Oct, 2021 (TSME22-ST international (4	Project Phase	Initiation
Risk Level	On Track		
Monthly Update	worked on some ST international changes		
Special Issues			
Cost			
Nov 05, 2021	Total Cost to Date (Direct + Indirect):	5,453.80	
	Estimated Cost at Completion (E\$AC):	39,061.37	
	Total Budget:	40,000.00	
	Variance (Budget minus E\$AC):	938.63	
	Reason For Variance:	minor changes for ST international work, bug fixes	

Projections
Nov 05, 2021

Dollars Projected For Month: 2,351.30
Actual Dollars Used: 1,673.01
Variance (Projected minus Actual): 678.29
Reason For Variance: NONE

Measures

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

Other Measures