

CLIENT / ADMINISTRATOR INFORMATION

	<i>Investigator</i>	<i>Administrative Contact</i>
<i>Name</i>		
<i>Affiliation</i>		
<i>Mailing Address 1</i>		
<i>Mailing Address 2</i>		
<i>Mailing City</i>		
<i>Mailing State</i>		
<i>Mailing ZIP</i>		
<i>Shipping Address 1</i>		
<i>Shipping Address 2</i>		
<i>Shipping City</i>		
<i>Shipping State</i>		
<i>Shipping ZIP</i>		
<i>Telephone 1</i>		
<i>Telephone 2</i>		
<i>Facsimile</i>		
<i>E-Mail</i>		

BASIC PROJECT INFORMATION

<i>Project Title:</i>			
<i>Description of the Project:</i>			
<i>Sample Size (S):</i>		<i>Waves of Data Collection:</i>	
<i>Target Number of Completes (N):</i>			
<i>Target Response Rate (RR):</i>			
<i>Type of Data Collection</i>		<i>Type of Other Activities</i>	
<i>Focus Groups</i>		<i>Tracking</i>	
<i>Cognitive Interviews</i>		<i>Data Entry</i>	
<i>Telephone Interviews</i>		<i>Editing</i>	
<i>Face-to-Face Interviews</i>		<i>Coding</i>	
<i>Mail (Self-Administered) Interviews</i>		<i>Other (describe)</i>	
<i>Web Based Interviews</i>			
<i>Administrative Record Searches</i>			
<i>Other (describe)</i>			

TYPE OF PROPOSAL REQUESTED AND FUNDING PARAMETERS

Formal Proposal		Ballpark Proposal	
Type of Formal			
Federal Government Contract		RFP / RFA / RFQ Number	
	RO!		
	PO1		
	UO1		
	Task Order		
Cooperative Agreement			
Federal Government Grant			
Foundation Funding			
Private Company Funding			
Funding Agency / Foundation / Company Name			
Foundation's Published Indirect Cost Rate			
	Start	End	
Budget Years			
	Direct	Total	
Annual Funding Cap			
Proposed Type of Agreement		Funding Status	
Cost Reimbursement		In Hand	
Fixed Price		For Inclusion With A Proposal	
Time & Materials			
Level of Effort			
Are Other Organizations Submitting Bids for This Work			
Yes			
No		Date Due to Funder	
		Date Needed From SRO	
Estimate of Expected Budget from SRO			

BID DOCUMENTATION	
Cost Documentation	

Direct, Indirect and Total Cost Only		
Single Page Budget – by line by year		
Budget By Task – by line by year		
Other (describe)		
Other Documentation		
Budget Justification		Expanded Technical Documentation
PHS Pages		ISR / SRC Facilities
PHS Bios		ISR / SRC IT Capabilities
Who		ISR Experience
		SRC Experience
		SRO Experience
PHS Other Support		Past Performance Contacts
Who		Number
		Other Client Required Materials
CVs		
Who		

TASKS SRO WILL BE INVOLVED IN	
Task 1	Management
Task 2	Sampling
Task 3	Questionnaire Development
Task 4	CAI Programming
Task 5	Sample Management System Programming
Task 6	Interviewer Hiring and Training
Task 7	Main Data Collection
Task 8	Post Collection Processing
Task 9	Sample Weighting and Estimation
Task 10	Project Deliverables

TASK 1 - MANAGEMENT				
	Level of Involvement			
	None	Low	Medium	High

Level of Project Management				
Level of Assistant Project Management				
Level of Financial Monitoring & Reporting				
	Weekly	Bi-Weekly	Monthly	Quarterly
Frequency of Progress Reports				
Interaction With Principal Investigator & Their Staff				
	None	Low	Medium	High
Involvement In OMB Package Presentation				
Involvement In Client IRB Submission				
Involvement in Informed Consent Development				
Other Management Services (describe):				

TASK 2 - SAMPLING				
Sample Size				
Sample Location	National	Detroit Area	Regional (describe)	
Is This a Longitudinal Sample	Yes / No		Last Time The Sample Was Contacted	
Will the Sample Be Released in Replicates	Yes / No		Who Will Develop the Replicates	
Type of Sample				
Ground Listing	Number of PSUs		Number of Segments	
Postal Route Listing	Number of PSUs		Number of Segments	
List Sample	List Provide By Who and Duration Since Last Updated / Contacted			
List Assisted RDD				
RDD				
Other (describe)				
Other Sampling Services	Sample Design		Mapping and/or Geo-coding	
	Sample Purchase		Replicate Development	
	Sample Selection		Sample Tracking	
TASK 3 - QUESTIONNAIRE DEVELOPMENT				
Questionnaire Developed By	Client	SRO Assists Client	SRO	
Questionnaire Formatted By	Client	SRO Assists Client	SRO	

Informed Consent Development	Client Develops	SRO Assists Client	SRO Develops
Focus Groups			
Number of Focus Groups			
Number of Participants Per Focus Group			
Specific Demographic Mix Per Group (Matrix of Cells Per Group)		Yes / No	
Specific Demographics Per Group (Matrix of Cells For Project)		Yes / No	
Length of Focus Groups			
Location of Focus Groups			
Sample Developed From		General Public	List Sample
List Sample from where (age)			
Incentives (Amounts)		Yes / No	()
Services			
Facilitation		Individual Focus Group Audio Recording	
Facilitators Assistance		Individual Focus Group Video Recording	
Participant Recruitment		Individual Focus Group Reporting	
Participant Scheduling		Summary Focus Group Reporting	
Facility Hosting		Audio Tape Transcription	
Development of Facilitators Manual			
Cognitive Interviews			
Number of Cognitive Interviews			
Specific Demographic Mix (Matrix of Cells For Project)		Yes / No	
Length of Cognitive Interviews			
Location of Cognitive Interviews			
Sample Developed From		General Public	List Sample
List Sample from where (age)			
Incentives (Amounts)		Yes / No	()
Services			
Cognitive Interview Conduct		Individual Cognitive Interview Audio Recording	
Participant Recruitment		Individual Cognitive Interview Video Recording	
Participant Scheduling		Summary Focus Group Reporting	
Facility Hosting		Cognitive Interview Coding	
Development of Interviewer Manual		Audio Tape Transcription	

TASK 3 - QUESTIONNAIRE DEVELOPMENT (CONTINUED)

Pre-Testing	Pre-Test 1	Pre-Test 2
Number of Pre-Tests		
Number of Pre-Test Interviews		
Location of Pre-Tests		

Sample Developed From	General Public / List	General Public / List
If List - from where (age)		
Type of Interviews	Face-to-Face / Telephone	Face-to-Face / Telephone
Type of Instrument	CAI / Paper	CAI / Paper
Questionnaire Length (Minutes)		
Questionnaire Length (Questions)		
Languages Itv Conducted In	English / Spanish / Other (specify)	English / Spanish / Other (specify)
Other languages		

TASK 4 - CAI PROGRAMMING

Has the Instrument Already Been Developed	Yes / No	
If Yes – May SRO Have a Copy to Assist in Developing Programming Est.	Yes / No	
Instrument Length (In Minutes)		
Instrument Length (Number of Questions)		
Type and Number of Questions		
Closed End		
Open End		
Other Specify		
Languages Other Than English & Spanish		
Other Language 1		
Other Language 2		
Other Language 3		
Other Language 4		
Skip Pattern Complexity		
None	Moderate	
Simple	Complex	
Interactive Computerized Components	ACASI	
Time Diaries	Cognitive Testing Measures	
Woodcock Johnson Testing	Physical Measures	
Other (describe)	Other (describe)	

TASK 5 - SAMPLE MANAGEMENT SYSTEMS PROGRAMMING

Will There Be Pre-Load Data	Yes / No		
Level of Modifications Required To The Standard Systems	Minor	Moderate	Major
Additional Reports or Report Modules Required (describe):			

TASK 6 - INTERVIEWER HIRING AND TRAINING

Special Requirements for Interviewers (languages, physical abilities, etc.) (describe)	Yes / No
Study Design / Instrument Intricacies to Be Addresses at Study Specific Training (describe)	Yes / No

TASK 7 - MAIN DATA COLLECTION

Type(s) Of Data Collection	
	Telephone
	Face-to-Face
	Mail
	Web
	Tracking
	Off-Cycle Contacts
	Biological Specimen Collection
	Mixed Mode (Check all that apply)
Number of Waves of Data Collection	

TASK 7 - MAIN DATA COLLECTION (CONTINUED)

TELEPHONE DATA COLLECTIONS

Centralized Data Collection		De-Centralized Data Collection	
Computer Assisted Telephone Interview		Paper & Pencil Telephone Interview	
	Wave 1	Wave 2	Wave 3
Sample Size (S)			
Target Number of Completes (N)			
Target Response Rate (RR)			
Instrument Length (in Minutes)			
Instrument Length (Number of Questions)			

Pre-Notification Letter	Yes / No	Yes / No	Yes / No
Pre-Notification Letterhead	Client / SRO / Joint	Client / SRO / Joint	Client / SRO / Joint
Maximum Number of Call Attempts			
Special Calling Schedule (if yes describe below)	Yes / No	Yes / No	Yes / No
Special Screening Criteria (describe below)	Yes / No	Yes / No	Yes / No
Will Proxy Interviews be Accepted	Yes / No	Yes / No	Yes / No
Increased Verification / QC	Yes / No	Yes / No	Yes / No
Will There Be Incentives	Yes / No	Yes / No	Yes / No
Will They Be Check, Token or Both			
Incentive Amount (Check)			
Token Incentive Provided By	Client / SRO	Client / SRO	Client / SRO
Incentives Mailed / Shipped By	Client / SRO	Client / SRO	Client / SRO
Comments:			

TASK 7 - MAIN DATA COLLECTION (CONTINUED)

FACE-TO-FACE DATA COLLECTIONS

Computer Assisted Personal Interview	Paper & Pencil Personal Interview		
	Wave 1	Wave 2	Wave 3
Sample Size (S)			
Target Number of Completes (N)			
Target Response Rate (RR)			
Instrument Length (in Minutes)			
Instrument Length (Number of Questions)			
Pre-Notification Letter	Yes / No	Yes / No	Yes / No
Pre-Notification Letterhead	Client / SRO / Joint	Client / SRO / Joint	Client / SRO / Joint

Special Screening Criteria (describe below)	Yes / No	Yes / No	Yes / No
Special Interviewing Location (describe below)	Yes / No	Yes / No	Yes / No
Will Proxy Interviews be Accepted	Yes / No	Yes / No	Yes / No
Is There An ACASI Component	Yes / No	Yes / No	Yes / No
Is There A Self-Administered Component	Yes / No	Yes / No	Yes / No
Increased Verification / QC (>10%)	Yes / No	Yes / No	Yes / No
Will There Be Incentives	Yes / No	Yes / No	Yes / No
Will They Be Check, Token or Both	Check / Token / Both	Check / Token / Both	Check / Token / Both
Incentive Amount (Check)			
Token Incentive Provided By	Client / SRO	Client / SRO	Client / SRO
Incentives Mailed / Shipped By	Client / SRO	Client / SRO	Client / SRO
Comments:			

TASK 7 - MAIN DATA COLLECTION (CONTINUED)

MAIL DATA COLLECTION				
Sample Size (S)				
Target Number of Completes (N)				
Target Response Rate (RR)				
Instrument Length (Number of Questions)				
Instrument Length (Number of Pages, Including Covers)				
Will There Be Incentives		Yes / No		
Will They Be Check, Token or Both				
Incentive Amount (Check)				
Token Incentive Provided By		Client / SRO		
Incentives Mailed / Shipped With Which Mailing				
	Time Lapse From Pre-Notification	Number of Pieces Sent	Expected Number of Completed	Method of Mailing

	Mailing		Returns	
Pre-Notification letter	0 Days			
1 st Questionnaire Mailing				
1 st Reminder Postcard				
2 nd Questionnaire Mailing				
2 nd Reminder Postcard				
3rd Questionnaire Mailing				
Telephone Reminder				
Conduct of Interview by Telephone				

Comments:

TASK 7 - MAIN DATA COLLECTION (CONTINUED)

WEB BASED DATA COLLECTION

Sample Size (S)		
Target Number of Completes (N)		
Target Response Rate (RR)		
Instrument Length (in Minutes)		
Instrument Length (Number of Questions)		
Invitation to Participate		
	By E-mail	Yes / No
	By Snail mail	Yes / No
	By Telephone	Yes / No
Reminders		
	By E-mail	Yes / No
	By Snail mail	Yes / No
	By Telephone	Yes / No
	Frequency	

Will There Be Incentives	Yes / No
Will They Be Check, Token or Both	Check / Token / Both
Incentive Amount (Check)	
Token Incentive Provided By	Client / SRO
Incentives Mailed / Shipped By	Client / SRO
Questionnaire Completion in Single or Multiple Sessions	Single / Multiple
Will Completion Require a Review of Responses	Yes / No
Site Maintained (Hosted) By	SRO / Other
Length of Time Site Maintained	
User Support Provided By	SRO / Other
Hours User Support Needs to Be Available	
Comments:	

TASK 7 - MAIN DATA COLLECTION (CONTINUED)

RESPONDENT TRACKING

Sample Size (S)	
National Change of Address Search	
National Death Index	
Social Security Death index	
Insight America (Web Service)	
Contact With Alternate Contact Persons	
Ground Tracking – Face-to-Face	
Other (describe)	

OFF CYCLE RESPONDENT CONTACT (for longitudinal studies)

Sample Size (S)	
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Periodic Mailings (birthday cards, newsletters, calendars etc.)	
	Frequency of Mailings
Periodic Telephone Calls	
	Frequency of Calls
Other (describe)	

BIOLOGICAL SPECIMEN / PHYSICAL MEASURE COLLECTION	
Types:	
	Height
	Weight
	Hips
	Waist
	Balance
	Stride
	Grip Strength
	Blood Pressure
	Lung Capacity
	Blood Spot
	Saliva
	Other
Specifications:	
Supplies & Equipment Purchased By or Provided By	
Biological Specimens Storage / Handling	
	Storage Location
	Interviewer Handling Instructions
Biological Specimen Processing by	
Other (describe)	

TASK 8 - POST COLLECTION PROCESSING				
Type of Activity:				
Data Entry		Average Number of Key Strokes Per Question	Number Done BY Numeric Entry	Number Done By Text Entry
	Number of Closed Ends			
	Number of Open Ends			
	Number of Other / Specify			
Verification % (if < 100%)				
Editing				
	Number of Closed Ends			
	Number of Other / Specify			
Coding				
	Number of Occupation / Industry			
	Number of Open Ends			
	Number Other / Specify			
Check Coding Verification % if > 10%				

Other Types of Post Data Collection Activities (describe)

TASK 9 - WEIGHTING AND ESTIMATION		
Services		
	Calculations and Sample Selection for Double Sampling	
	Calculation of Sample Weights	
	Calculation of Final Response Rate	
	Imputation of Missing Data	
	Other (describe)	

TASK 10 - PROJECT DELIVERABLES						
Copies of Training Materials		Interim Data Delivers				
Copies Of Data Collection Materials		Frequency	Weekly	Monthly	Quarterly	
Documentation of Data Collection Protocols		Final Data Delivery				
Final Report (level of complexity)		When				
Simple	Medium	Complex	Format	SAS	SPSS	ASCII
Data Analysis				Access	Excel	Other
Assistance In Preparation of Reports / Articles		Other Research Related Services				
Hard Copy Record Storage		Archiving				
Stored By SRO	Shipped to Client		Simple	Medium	Complex	
Other (describe)						