Survey Research Operations

Monthly Project Report

Sponsored

January 2022

Sponsored Projects Dashboard

NonArchived Sponsored Projects

Project	Type	Status	Project Lead	Jan
ACL6	Sponsored	Current	Terri Ann Ridenour	🟢
ACL-LIFE	Sponsored	Current	Terri Ann Ridenour	🟢
AFHS	Sponsored	Current	Rebecca Gatward	🟢
ALS Controls	Sponsored	Current	Rebecca Loomis	🟡
BFY	Sponsored	Current	Piotr Dworak	🟢
C.A.R.E. 2022	Sponsored	Current	Donnalee Ann Grey-Farquharson	🟢
CAMS 2021	Sponsored	Current	Deborah Zivan	🟢
CBII	Sponsored	Current	Maureen Joan O'Brien	🟢
CDS-21	Sponsored	Current	Sarah Crane	🟢
ECHO (Year 6)	Sponsored	Current	Terri Ann Ridenour	🟢
EDC Midline	Sponsored	Current	Barbara Lohr Ward	🟢
EDC-SS Phases 3-4	Sponsored	Current	Karin Schneider	🟢
H&WB	Sponsored	Current	Barbara Lohr Ward	🔴
HCAP 2020	Sponsored	Current	Maureen Joan O'Brien	🟢
HRS 2021 OYMS / COVID Survey	Sponsored	Current	Ian Ogden	🟢
HRS 2022 Panel	Sponsored	Current	Evanthia Leissou	🟡
HRS2022-NewCohort	Sponsored	Current	Evanthia Leissou	🟢
LSA Space Survey	Sponsored	Current	William Keating	🟢
MARS 2	Sponsored	Current	Margaret Lee Hudson	🟢
MI CReSS (Year 2)	Sponsored	Current	Terri Ann Ridenour	🟢
MTF base year 2017-2022	Sponsored	Current	Rebecca Gatward	🟢
MTF HID 22	Sponsored	Current	Donnalee Ann Grey-Farquharson	🟢
MTF Panel (main data collection) 2021	Sponsored	Current	Donnalee Ann Grey-Farquharson	🟢
PSID TAS 2021	Sponsored	Current	Piotr Dworak	🟢
PSID21	Sponsored	Current	Shonda R Kruger-Ndiaye	🟢
SCA 2022	Sponsored	Current	Theresa Camelo	🟢
SRS 2022	Sponsored	Current	Barbara Lohr Ward	🟡
STARRS-LS Waves 3 & 4	Sponsored	Current	Meredith A House	🟡
VCT	Sponsored	Current	Andrew L Hupp	🟢
WCJ -Remote Pilot	Sponsored	Current	Hongyu Johnson	🟢
WMH-Qatar	Sponsored	Current	Sarah Elisa Broumand	🟢

Sponsored Projects

(ACL6) Americans' Changing Lives - Wave 6
(ACL-LIFE) ACLLIFE Life History Interview and Validation (ACLLIFE)
(AFHS) American Family Health Study
(ALS Controls) ALS Matched Control Recruitment
(BFY) Baby's First Years
(C.A.R.E. 2022) Concussion Assessment, Research and Education (CARE) Consortium 2022
(CAMS 2021) HRS 2021 Consumption and Activity Mail Study
(CBII) Mellon College and Beyond II
(CDS-21) PSID Child Development Supplement 2021
(ECHO (Year 6)) Environmental Influences on Child Health Outcomes
(EDC Midline) Every Dollar Counts Program Evaluation Midline Surveys
(EDC-SS Phases 3-4) Every Dollar Counts Semi-Structured, Phases 3-4
(H&WB) Health and Wellbeing in Southeast Michigan
(HCAP 2020) Harmonized Cognitive Assessment Protocol, 2020
(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 - Screening
(LSA Space Survey) LSA Space Survey
(MARS 2) Malaysia Ageing and Retirement Study Wave 2
(MI CReSS (Year 2)) Michigan COVID-19 Recovery Surveillance Cohort Study
(MTF base year 2017-2022) Monitoring the Future - Base Year 2017-2022
(MTF HID 22) MTF High Intensity Drinking 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 2022) Surveys of Consumer Attitudes
(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

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 Jan, 2022 (ACL6)   **Project Phase** Closing

Risk Level *On Track*

Monthly Update ACL6 (reboot / phase 2) data collection wrapped up on November 29. The final reboot sample included 101 ACL participants who had agreed to complete their ACL6 interview. At the end of data collection, there were 39 additional interviews completed. We have started project closeout tasks. Final result codes and call notes have been assigned after Prod/Proj Manager final adjudication of 438 remaining sample lines. All final Blaise survey and SurveyTrak sample management data has been delivered to the client, prior to their data manager's departure (Megan is moving to ICPSR).

As a reminder, SRO was authorized by the PI to spend up to $44,200 direct costs ($69,000 total) to complete 10

additional ACL6 interviews. We have well exceeded the number of interviews expected and are within budget. The funding for the reboot will be allocated by Nick only after the final, actual costs are known.

We monitored production metrics throughout this "Reboot" (phase 2) period, sent updated cost reports and managed 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 did so. On 10/28 the PI agreed that "due to highly diminished returns for the effort of continuing," it was best to end data collection on 11/29.

There are 69 panel members remaining who had recently expressed willingness to be interviewed for ACL6 during the reboot/phase 2 period. Contact attempts were made to reach them, but the interview was not completed by the end of data collection period (December 2021).

The PI asked for a debriefing meeting sometime in January or February, to make sure she understands everything and to mark this accomplishment. We'll work with her to arrange a meeting.

Special Issues

Cost
Feb 16, 2022

Total Cost to Date (Direct + Indirect):	806,483.48
Estimated Cost at Completion (E$AC):	815,996.92
Total Budget:	772,591.00
Variance (Budget minus E$AC):	-43,405.92
Reason For Variance:	As of this report, $25,102 direct costs have been spent to-date. The total, projected cost to complete is currently $27,796.

Projections
Feb 16, 2022

Dollars Projected For Month:	6,200.10
Actual Dollars Used:	6,323.60
Variance (Projected minus Actual):	-123.50
Reason For Variance:	

Measures

	Units Complete	RR	HPI
Current Goal:	1,058 (1,526 sample)	80%	5
Goal at Completion:			
Current actual:	768	58%	6.7
Estimate at Complete:			
Variance:			

Other Measures   Home Visit Consent

Goal at Completion: 700

Current Actual: 413
Current Undecided: 20

Project Name	(ACL-LIFE) ACLLIFE Life History Interview and Validation (ACLLIFE)		
Project Mode	Primary: Telephone		
Project Type	Sponsored Projects		**Project Status** Current
Budget	***Direct Budget:*** 520,637.00	***InDirect Budget:*** 291,556.00	***Total Budget:*** 812,193.00
Principal Investigator/Client	Sarah Burgard (SRC, Population Studies / Sociology / Epidemiology)		

Funding Agency			
IRB	***HUM#:*** HUM00177366	***Period Of Approval:*** 2/5/2021 -	
Project Team	***Project Lead:***	Terri Ann Ridenour	
	Budget Analyst:	Grace Tison	
	Production Manager:		
	Senior Project Advisor:	Shonda R Kruger-Ndiaye	
	Production Manager:		
	Production Manager:	Pooja Varma-Laughlin	

Proposal #: no data

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

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

Milestone Dates

PreProduction Start: 04/01/2020	***Pretest Start:***
Pretest End:	***Recruitment Start:***
Staffing Completed:	***GIT Start:***
SS Train Start: 02/15/2021	***SS Train End:***
DC Start: 02/22/2021	***DC End:*** 12/04/2021

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

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Report Period	Jan, 2022 (ACL-LIFE) **Project Phase** Closing
Risk Level	*On Track*
Monthly Update	We ended 40 weeks of data collection on 12/4. That is, 26 weeks in the original design and an additional 14 week extension. We have started project closing tasks, including the documentation of lessons learned and finalization of all sample lines.
	Nick (SEH) received a UG report and Grace responded by providing Nick with the SRO project-specific justification he incorporated in their ACR submission. Grace quickly responded to this request so Nick could get it approved before the middle of this month (January).
Special Issues	The overrun status of this project is due to design modifications (i.e. 14 week data collection extension and increasing ToA to $300), in addition to 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 and then $300 for endgame offer. ($25,600)
	--Data Collection Extension of 14 additional weeks -- from 26 to 40. ($11,215)
	--Fringe Benefits increases due to more staff hours being projected than originally budgeted. ($26,458)
	--Hybrid Staff model includes both Survey Techs (from the Lab) and Field Interviewers (from the Field); there is a higher rate for Field Interviewers. ($15,654)
	--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. ($9,004)
	--Miscellaneous - other staff hours (Admin, DCO, HR, Meeting Planner, Graphic Designer, SHV) ($8,803)
	--Help Desk support costs are exceeding the initial 40 hours included in the proposal budget. ($4,664)

Cost		
Feb 16, 2022	*Total Cost to Date (Direct + Indirect):*	874,275.39
	Estimated Cost at Completion (E$AC):	875,227.07
	Total Budget:	812,193.00
	Variance (Budget minus E$AC):	-63,034.07

Reason For Variance: Of the $520,637 total, direct budget, $558,871 has been spent to-date. We currently project a final, direct cost overrun of $42,493 (8%).

Our current projections include the effort required to finalize 200+ non-final sample lines, by adding final result codes and final call notes, and carrying out other project closeout tasks.

Although we weren't able to achieve 80% overall response rate target, we were able to complete 88% Re-Interviews and surpass our end game goal by completing 756 interviews.

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
-- Extended data collection for 14 weeks
-- Implemented numerous weekly Iwer goals / strategies, via Pooja and the production management team
-- Continued 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 Feb 16, 2022

Dollars Projected For Month:	2,803.39
Actual Dollars Used:	2,435.55
Variance (Projected minus Actual):	367.84
Reason For Variance:	

Measures

	Units Complete	RR	HPI
Current Goal:	960 (n=1,284-83 NS)	80%	5
Goal at Completion:	960	80%	5
Current actual:	756	62%	7.69
Estimate at Complete:	756	63%	7.69
Variance:	204	17%	-2.69

Other Measures

Re-Contact RR: 30%
Re-Interview RR: 88%

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	01/2019 - 03/2022
Data Col Period	05/2020 - 01/2022
Security Plan	NA
Milestone Dates	

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

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

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Report Period	Jan, 2022 (AFHS)	**Project Phase**	Implementing

Risk Level   *On Track*

Monthly Update	January update
	Response on 1/27
	We have received 3576 completed screener forms (RR 16.4%). The eligibility rate is currently 60%.
	Of the 2138 eligible cases, 1215 have completed the main interview - response rate of 57%.

Special Issues

Cost **Feb 16, 2022**	*Total Cost to Date (Direct + Indirect):*	2,452,821.57
	Estimated Cost at Completion (E$AC):	2,452,821.57
	Total Budget:	2,490,133.00
	Variance (Budget minus E$AC):	-5,802.94
	Reason For Variance:	As we are close to the end of the project we are monitoring costs very closely - we anticipate receiving credit for cheques that are not cashed - I have also been projected respondent payments on the generous side.

Projections **Feb 16, 2022**	*Dollars Projected For Month:*	35,484.05
	Actual Dollars Used:	38,788.06
	Variance (Projected minus Actual):	-3,304.01
	Reason For Variance:	Majority of the variance is from non-salary costs - the final invoice from DataForce did not arrive until February (the cost was projected in January).

Measures

	Units Complete	RR	HPI
Current Goal:	2000 (main IWs)	33.3%	NA
Goal at Completion:	2000	33.3%	NA
Current actual:	1215	48%	NA
Estimate at Complete:	1300	60%	NA
Variance:	700	+27% (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 (elibility 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

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

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

Report Period   Jan, 2022 (ALS Controls)   **Project Phase**   Implementing

Risk Level   *Some Concerns*

Monthly Update   January 2022: Mailings are still paused. Monitoring for qualtrics survey completes continues; there were less completes this month than December, but a few continue to trickle in. The account will stay open at a reduced level to accommodate the process for respondent payments. We will review this status with the PI team on February 1, 2022.

Special Issues

Cost
Feb 16, 2022

Total Cost to Date (Direct + Indirect):	87,827.30
Estimated Cost at Completion (E$AC):	93,190.92
Total Budget:	255,139.51
Variance (Budget minus E$AC):	161,948.59
Reason For Variance:	Mailings continue to be suspended

Projections
Feb 16, 2022

Dollars Projected For Month:	1,435.07
Actual Dollars Used:	1,526.52
Variance (Projected minus Actual):	-91.45
Reason For Variance:	Mailings continue to be suspended

Measures

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

Other Measures

Project Name	(BFY) Baby's First Years
Project Mode	Primary: Face to Face Total of Modes: 1
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 5,372,133.00 **InDirect Budget:** 1,950,725.73 **Total Budget:** 7,322,858.73
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:

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

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

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

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

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

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

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

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

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

**Other Project
Names:** HHICD Household Income and Childhood Development

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

- -

Report Period Jan, 2022 (BFY)   **Project Phase** Implementing

Risk Level *On Track*

Monthly Update Project updates:

BFY Age 3 data collection continues on track just shy of goal by 1 in week 34 01/16 - 01/22 (567 vs. 568). We continue to face ripples of the hurricane summer in NOLA. Some of our LA respondents are still displaced and in temporary housing and we tread lightly understanding their difficult situations. To assist LA interviewers we swapped the sample which had some effect and improved contact rates. We are also keeping an eye on MN. All other sites are on or ahead of their cumulative and weekly goals.

We are also tracking the Age 3-4 follow up effort which started in October 2021. We are not starting to contact Rs 6 months after their children's 3rd birthday. Thanks to continued effort by iwers and TLs we see improved re-contact / address update rates upwards of 80%. We are finalizing protocols for the 10-month hand-off to the PIs and the lab teams in January. Hand-off to the labs will begin in May 2022.

In January we started rolling out the iwer bonus plans. Iwers will receive a total of $500 spread over the months of Jan through June. We are also sending b-day cards to the Rs and the children and have settled on a small gift / NMI which will be sent to evasive Rs and/or brought in person.

MN Financial Crimes Task Force is investigating a forgery of U-M check. An individual (not R) was arrested and had the U-M issued check to the R in their possession with the amount changed from $50 to $5,500. The check has not been cashed and the U-M Business Office is in contact with the investigating agent. Proceedings are kept confidential.

BFY Research Team has published first results from Age 1 EEG data collection to the muted reaction from the Rs.

We've only heard two reports of Rs which were positive - Rs were happy to participate in the study producing meaningful results. We are monitoring for any negative reactions. More information is available @ https://www.babysfirstyears.com/.

Data collection / Sample:

Age 3 results by site through week 34:

```
        Goal    Actual  +/-
Total 568       567
NE 171    175
NY 151    152
MN 74    71
LA 172    169
```

Staffing (no change):

Age 3 Staffing:
13 iwers in total
NE: 1 + 1 NH (Trained 9/15)
MN: 2
NY: 5 OS
NOLA: 2 (1 resignation)
Locators: 2"

Technical system:

Development of BFY Age 3 - 4 mid-wave follow up has concluded in November - January. We expect some DCA development in March to create the lab hand-off protocols for the Age 4 lab visit.

Finances:
We have been staying under/on the approved overrun. The proposal group in conjunction with UMROP has issued a proposal to cover the outstanding $518K overrun communicated in September 2021. The proposal is being accepted and on its way to receive funding.

Special Issues

Cost
Feb 16, 2022

Total Cost to Date (Direct + Indirect):	6,301,376.59
Estimated Cost at Completion (E$AC):	7,835,935.83
Total Budget:	7,322,858.73
Variance (Budget minus E$AC):	-513,077.10
Reason For Variance:	Note, the cost is still projected to come under the -$518K overrun expected by the PIs. Continuing savings allowed to add some time to iwer hours, management, and support roles in anticipation of Age 3-4 midwave outreach needs beyond June 2022.

Projections
Feb 16, 2022

Dollars Projected For Month:	116,052.16
Actual Dollars Used:	97,905.75
Variance (Projected minus Actual):	18,146.41
Reason For Variance:	Lower project management and interviewing time. Also lower TSG, most of the BFY tech development has been completed in November - January.

Measures

	Units Complete	RR	HPI
Current Goal:	568	57%	7.0
Goal at Completion:	907	91%	7.0
Current actual:	567	57%	5.7
Estimate at Complete:	907	91%	6.0
Variance:			

Other Measures

Project Name	(C.A.R.E. 2022) Concussion Assessment, Research and Education (CARE) Consortium 2022
Project Mode	Primary: Telephone Secondary: Web Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current

Budget   **Direct Budget:** 3,583,669.00   **InDirect Budget:** 931,755.00   **Total Budget:** 4,515,424.00

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#:**   00202691   **Period Of Approval:** 7/23/2021 - open

Project Team

Project Lead:	Donnalee Ann Grey-Farquharson
Budget Analyst:	Mary Johnson
Production Manager:	Sharon K Parker
Senior Project Advisor:	Barbara Lohr Ward
Production Manager:	Hongyu Johnson
Production Manager:	Keith Liebetreu

Proposal #:   no data

Description:

SRO will provide consultation, respondent locating activities and data collection for respondents in the longitudinal Concussion Assessment, Research and Education (CARE) study, with the goal of securing participation from 7,500 unique past-CARE study participants. Participants will complete the same set of study assessments at two time points over the five-year project period. The project follows collegiate athletes post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure. Specifically, SRO decentralized field interviewers will locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.

This budget assumes an overall SRO involvement period of approximately 44 months over two waves. Wave 1 SRO involvement will begin in December 2021 with data collection taking place over approximately 12 months, beginning approximately May 2022. Wave 2 SRO involvement will begin in November 2023 with data collection taking place over approximately 12 months starting in May 2024.

Currently, the total cost for the overall scope of work (based on the currently committed funding from all sources) is estimated at $4,685,914. This includes $3,718,978 direct and $966,936 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders). As additional sources of funding are identified and those resources committed to SRO survey data collection activities, or inversely if a funder withdraws or reduces their level of funding to the project, the scope of work (e.g., the number of interviews to be collected) will increase or decrease respectively.

The estimate of funding contributed by the Department of Defense through the MTEC RFP is $2,277,689. This includes $1,807,689 direct costs and $470,000 indirect costs budgeted at the 26% indirect cost rate. The proposed period of support is September 1, 2021 through August 31, 2025.

SRO Project Period	10/2021 - 08/2026
Data Col Period	03/2022 - 02/2026
Security Plan	NA

Milestone Dates

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

Other Project Team Members: Donnalee Grey-Farquharson, Sharon Parker, Hongyu Johnson, Keith Leibetreu, James Koopman, Minako Edgar, David Ackuaku, Parina Kamdar

Other Project Names:	CARE CSI, CARE SALTOS
Sample Mgmt Sys	Other (non-SRO)
Data Col Tool	Other (non-SRO)
Hardware	Laptop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, R
Administration	UM Group (Kinesiology)
Payment Type	Check, post ($75.00)
Payment Method	Check through other system (UM)

Report Period	Jan, 2022 (C.A.R.E. 2022)	Project Phase	Planning

Risk Level — *On Track*

Monthly Update

Management:
- Continue dialogue with all stakeholders.
- Started preparation on work scopes

Technical Development
-Continue to work with the QG on refining the SMS

Questionnaire Development
-Submitted specs to QG for programming and testing

Hiring and Recruitment
-Actively working with DCO on staff recruitment activities

Special Issues

Cost
Jan 31, 2022

Total Cost to Date (Direct + Indirect):	51,748.92
Estimated Cost at Completion (E$AC):	4,525,013.49
Total Budget:	4,515,424.00
Variance (Budget minus E$AC):	-4,525,013.49
Reason For Variance:	We are currently using a hardship account. Projections will be updated soon.

Projections
Jan 31, 2022

Dollars Projected For Month:	31,103.54
Actual Dollars Used:	20,546.92
Variance (Projected minus Actual):	10,556.62
Reason For Variance:	Projections will be updated and should be reflected in next month's report.

Measures

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

Other Measures

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

Funding Agency

IRB	**HUM#:** HUM00079949	**Period Of Approval:**	1/28/2021 - 1/27/20
Project Team	**Project Lead:** Deborah Zivan		
	Budget Analyst: Grace Tison		
	Production Manager:		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager: Evanthia Leissou		
	Production Manager:		

Proposal #:	no data
Description:	CAMS is part of the Health and Retirement Study (HRS). The goal of CAMS is to gather additional data on household consumption and activities of daily living from participants in the HRS. In 2021, a paper questionnaire will be mailed to approximately 8,000 respondents of which 6,000 will receive the full questionnaire and 2,000 spouse/partners will receive a brief questionnaire.
SRO Project Period	05/2021 - 05/2022
Data Col Period	09/2021 - 04/2022
Security Plan	NA

Milestone Dates

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

Other Project Team Members:	Data Manager: Laura Yoder, 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	Jan, 2022 (CAMS 2021) **Project Phase** Implementing
Risk Level	On Track
Monthly Update	General summary for monthly activities: - Export of address updates to Update Database - Continued thank you postcard mailings - Decreased logging as a result of decrease returned questionnaires - Continued shipping of completed questionnaires to study staff
Special Issues	None.

Cost
Feb 08, 2022

Total Cost to Date (Direct + Indirect):	444,549.22
Estimated Cost at Completion (E$AC):	399,285.15
Total Budget:	399,597.00
Variance (Budget minus E$AC):	311.85
Reason For Variance:	Last month's total project variance was 7636 and this month's variance is 312. In December a check void request in the amount of $5,700 was submitted. Overall check voids were adjusted significantly based on this large check void request resulting in a significant change in the project variance.

Projections
Feb 08, 2022

Dollars Projected For Month:	10,989.52
Actual Dollars Used:	8,748.15
Variance (Projected minus Actual):	2,241.37
Reason For Variance:	Indirect costs, postage and staff hours account for this variance. Across these areas, relatively small differences between projections and actual costs explain the variance.

Measures

	Units Complete	RR	HPI
Current Goal:	5256	66.4%	
Goal at Completion:	5256	66.4%	
Current actual:	4261	59.0%	
Estimate at Complete:	4688	61.0%	
Variance:	568	5.4%	

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: The purpose of the College and Beyond II project is to help educators better understand the importance of students' undergraduate experiences in and out of the classroom to their life-course development. College graduates with an undergraduate degree were invited to participate in a 35-45 minute web survey. Sample was selected from the following universities: The University of Michigan (U-M), Truman State University, the City College of New York (CUNY), Indiana University Bloomington (IU), Georgia College & State University (GCSU), the University of Houston (UH), and the University of California, Irvine (UCI). A pilot was completed in fall 2019. A pilot was completed in 2019 to refine and test the measures used in order to create a questionnaire that could better assess the value of an undergraduate education. The RR goal is ~20% (n=3,000) as well. There is a reminder calling and manual locating effort.

R's were invited by letter and email. Each participant will receive a $30 check as a token of appreciation. SRO is responsible for processing checks. Four open-ended occupation/industry questions are included in the survey. This includes, type of work performed, job duties, job title, and specific business/industry. Responses to the occupation questions will be coded by PDMG and SSL staff. The instrument was programmed using Illume, and the sample management system is Blaise SMS. Each day, all sample is delivered from Illume to Blaise via batch process. All non-final sample will be delivered to iwers for reminder calling or locating. Sample with a finalized result code will not be delivered to iwers.

SRO Project Period	10/2020 - 10/2021
Data Col Period	01/2021 - 06/2021
Security Plan	NA

Milestone Dates

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

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

Report Period	Jan, 2022 (CBII) **Project Phase** Closing
Risk Level	*On Track*
Monthly Update	Data collection officially ended on 7/25/2021 with 2,804 completed interviews. While the goal was to complete 3,000, the PI's were happy with this number completed. Part of the reason for this is that Iwer effort was put toward reminder calling and locating targeted groups that were harder to reach. Sample balance was more important than yield, to the PI's. 607 surveys were completed after having been contacted by reminder callers. Another contributor to lower yield is the emphasis that has been placed on subgroups throughout reminder calling and manual locating. Occupation/industry coding is completed. 2,751 cases contained occ/industry items to code. Weighting has been completed and a final weighted data file has been delivered. The final report was completed and has been forwarded to project staff. We expect costs to hit the account for one more month, at a very low rate. The team is aiming for a final project review in March, 2022.
Special Issues	None currently

Cost
Feb 16, 2022

Total Cost to Date (Direct + Indirect):	642,569.18
Estimated Cost at Completion (E$AC):	642,592.05
Total Budget:	643,762.00
Variance (Budget minus E$AC):	1,169.95
Reason For Variance:	Projected cost to close is in good shape.

Projections
Feb 16, 2022

Dollars Projected For Month:	469.30
Actual Dollars Used:	470.53
Variance (Projected minus Actual):	-1.23
Reason For Variance:	Spent more time on completing Final Report.

Measures

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

Other Measures

Project Name	(CDS-21) PSID Child Development Supplement 2021
Project Mode	Primary: Telephone Total of Modes: 1
Project Type	Sponsored Projects

Project Status   Current

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

Principal Investigator/Client   Narayan Sastry
Paula Fomby

Funding Agency

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

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

Proposal #:   no data

Description: A 2021 wave of the Childhood Development Supplement (CDS) is planned for November 2021 – June 2022. CDS 2021 sample is comprised of family units (FUs) with CDS eligible children that completed CDS19 and PSID21. Approximately 2,400 families will be included, with some Core families containing several CDS children. As part of the CDS, families are asked to complete multiple interviews (i.e., coverscreen, PCG interview, Child interview--including an IVR component). Interviews will be completed in English and Spanish. We anticipate multiple releases of sample, based on PSID21 completion. CDS21 sample also includes ~1000 families that are included in TAS21 data collection.

SRO Project Period   05/2021 - 11/2022
Data Col Period   11/2021 - 06/2022
Security Plan   NA

Milestone Dates

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

Other Project Team Members:
Rachel Orlowski   Project Consultant
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	Jan, 2022 (CDS-21)	**Project Phase**	Implementing

Risk Level   *On Track*

Monthly Update   Production is continuing in the field, with strong Iwer hours. Current production week response rates exceed those from CDS19 overall and CDS14 TEL-only, across all instruments (CS, PCG, and Adol). The RR for available IVR lines is 85%.
We are busy planning for upcoming NRFU work, including update and activation of the SRO mapping application. 19

of the 30 staffed Iwers have indicated willingness to complete some doorstep FTF work, and the next amendment will seek approval for updated materials.

Special Issues

Cost
Feb 08, 2022

Total Cost to Date (Direct + Indirect):	940,449.45
Estimated Cost at Completion (E$AC):	2,251,793.13
Total Budget:	2,288,240.00
Variance (Budget minus E$AC):	36,446.87
Reason For Variance:	The project recently updated projected Iwer hours to match actuals from the full team, post T2. Two locators are also working more weekly hours than projected.

Projections
Feb 08, 2022

Dollars Projected For Month:	153,463.00
Actual Dollars Used:	140,914.00
Variance (Projected minus Actual):	12,548.00
Reason For Variance:	This direct cost underrun is mainly due to less interviewer hours worked mid-January than projected, less survey tech hours worked, and small non-salary underruns in areas including printing/duplicating and telephone/cell phones.

Measures

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

Other Measures

Component	goal units completed
Coverscreen	2184
PCG Blaise interview	1966
Child Blaise interview	1307
IVR	1176

Component	RR
Coverscreen	90%
PCG Blaise interview	90%
Child Blaise interview	85%
IVR	90%

Project Name	(ECHO (Year 6)) Environmental Influences on Child Health Outcomes
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 3
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 273,933.00 **InDirect Budget:** 153,403.00 **Total Budget:** 427,336.00

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:**   10/2/2021-8/13/2022

Project Team
Project Lead: Terri Ann Ridenour
Budget Analyst: Parina Kamdar
Production Manager:
Senior Project Advisor: Evanthia Leissou
Production Manager: Ian Ogden
Production Manager: Sharon K Parker

Proposal #:   no data

Description:

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

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

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

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

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

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

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

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

Other Project Team Members:
Ian Ogden: Project Manager
Kasyera Kowalczyk: Project Manager
Parina Kamdar: Financial Analyst
Gregg Peterson: Senior Technical Advisor
Jeff Smith: Technical Lead
Mark Simonson: Data Manager (Phase 1)
Brad Goodwin: Data Manager (Phase 2)
Jennie Williams: Data Manager (Phase 3)
Jeff Smith: SurveyTrak Systems Programmer
Ashwin Dey: Systems Programmer
Hueichun Peng: CAI Programmer-Illume
Peter Sparks: CAI Programmer-Blaise
Shaowei Sun: Biospecimen Logging Application Programmer
Deb Wilson: Help Desk

Other Project Names:

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

Report Period	Jan, 2022 (ECHO (Year 6))
Project Phase	Implementing
Risk Level	*On Track*

Monthly Update

[Phase 1: Recruitment and Prenatal Surveys]

Recruitment continues in 7 prenatal clinics. Terri will deliver another 4-day remote training in March to a Spectrum Recruiter who will begin working as an Interviewer.

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

Production Stats

To date, 1,295 women have been recruited in clinics across the state of Michigan. Among those cases, 913 were still eligible and active study participants at the end of Phase 1 (prenatal period through child birth). The MARCH recruitment target is 1,100 live births. The main priority between now and next August 2022 is to complete recruitment of this representative sample and Mike Elliott can begin weighting. At this time, the study will need to recruit another 200 women to meet their goal of 1,100.

Prenatal Survey 1: 805
Prenatal Survey 2: 610

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[Phase 2: 3-Month Data Collection Summary]
    Babies born: 787
    3-month sample released: 766
    3-month interviews completed: 547
    3-month biospecimen collected: 325
    Average attempts / Iw: 7.8
    Iw length: 46 min.
    Response Rate: 72%


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[Phase 3: Age 4 Protocols]
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Priorities for the in-person data collection are anthropometrics, saliva specimen (DNA) and NIH toolbox and the Age 4 SurveyTrak project is being programmed with these priorities in mind.

Pre-production development work continues on the Age 4 protocols. The Phase 3 technical team still continues to work on system requirements and programming spec. The development of a simple sample management system (i.e. SurveyTrak, WebLog) is in progress and will support the administration of and logging outcomes for age 4 protocols, including REDCap surveys.

Kasyera continues to follow up with those 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-person visits, including administration of assessments, obtaining physical measures, and collecting bio-specimens.

Our Age 4 training is scheduled in Ann Arbor March 16-18. We're working with the MSU team to create the in-person training and adhere to the MSU IRB requirements for all ECHO data collectors. Prior to training, interviewers and team leaders are required to complete about 12 hours of Pre-Training / Self Study activities outlined below.

--Request access to the Learning Management System (LMS)
--Complete consent for a background check as soon as it is received via email.
--Complete the My LINC course titled "UMOR_MRP101 - Minors as Research Participants"
--Complete the assigned modules in the LMS (when access is given) before 3/14.

Special Issues

With the departure of Debra, a long term project management resource (SSA) is needed to support all ECHO protocols, including overseeing prenatal consent QC, sending 3M biospecimen kits, processing all ToAs, etc. Right now Steven S. has agreed to work on supporting 3M tasks until a more long term SSA project resource is in place.

We need the attention of the Phase 1 data manager to resolve the high-level request from the PI -- i.e. adding date stamp data to PN2 survey data and update future deliverables. The client requested these updates by early February. Programming updates for PN1, but PN2 have been made, testing has been carried out and now we're waiting for the Phase 1 data manager's review of test data out to sign off on solution before release to the field (production).

We're eager for TSG Admin to identify a long term Phase 1 data manager resource for ECHO. It has been in the works for nearly two years now.

Cost
Feb 16, 2022

Total Cost to Date (Direct + Indirect):	127,770.33
Estimated Cost at Completion (E$AC):	426,063.82
Total Budget:	427,336.00
Variance (Budget minus E$AC):	1,272.18
Reason For Variance:	We reviewed the overall Year 6 budget together and Parina and Bill updated staff projections. We believe it includes sufficient time for SRO to learn protocols, train Iwers and administer the Age 4 protocols (REDCap, in-person visit, including assessments, anthropometrics 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 begin the in-person visits, a significant part of the Age 4 scope of work.

Projections
Feb 16, 2022

Dollars Projected For Month:	44,850.62
Actual Dollars Used:	32,956.32
Variance (Projected minus Actual):	11,894.30
Reason For Variance:	3-month interviewer hours, respondent ToAs, postage costs and Age 4 in-person protocol costs (e.g. travel and Age 4 Iwer hours) were less than projected. We won't start incurring Age 4 in-person protocol expenses until March. We've updated projections to reflect.

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:*	611,135.00	*Total Budget:*	2,124,151.00

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:	Nicole G Kirgis
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	09/2021 - 10/2022
Data Col Period	03/2022 - 07/2022
Security Plan	NA

Milestone Dates

PreProduction Start:		*Pretest Start:*	
Pretest End:		*Recruitment Start:*	01/01/2022
Staffing Completed:	03/04/2022	*GIT Start:*	02/26/2022
SS Train Start:	02/28/2022	*SS Train End:*	03/31/2022
DC Start:	04/04/2022	*DC End:*	08/14/2022

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)
Other Project Names:	EDC
Sample Mgmt Sys	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	Camtasia
Incentive	Yes, R
Administration	SRO Group; Other (PI Payment)
Payment Type	Cash, prepaid ($50 Goodwill Token); Cash, post ($50); Other ($50 - Kept Appt)
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox); Other (Electronic payment by PIs)

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Report Period	Jan, 2022 (EDC Midline)	**Project Phase**	Initiation
Risk Level	*On Track*		

Monthly Update	During January 2022, SRC activities on the EDC Midline project included the following:

Task 1: Management, Budget and Work Plan
• Participated in weekly project meetings with ORL to discuss scope, cost projections and schedule
o Discussed delay of the training/study launch
• Reviewed monthly project expenses. Updated labor and non-labor projections.
o Added labor projections for programming scope changes and Survey Services Lab interviewer cell phones.
o Provided cost estimate for revisions to the Self-Scheduler
• Updated Blaise specifications for DK/RF programming. Conducted continuous rounds of scenario testing,

provided updates to Blaise programmers
- Reviewed/updated draft data deliverable documentation and preload specifications
- Conducted testing in SurveyTrak and the Self-Scheduler. Updated specifications as necessary.
- Conducted internal meetings to elaborate the field management plan for production
- Conducted meetings to elaborate the training agenda and training plan.

Task 2: Sampling
- No activity this month

Task 3: Questionnaire Development
- Began preparation of Spanish version of questionnaire

Task 4: CAI Programming
- Conducted continued rounds of programming/testing/bug fixes on the questionnaire and post interviews observations. Made updates to the Blaise preload specifications as necessary.

Task 5: Systems Programming
- Sample Management Systems
o Worked with ORL to further define/refine the logic for automatic and cash payments
o Made edits to sample management system specification. Work with study team to elaborate design of tabs and other functions in SurveyTrak.
o Continued programming/testing on the sample management system
o Prepared preload for testing SurveyTrak and the Self-Scheduler and made preparations for integrated testing
- Self-Scheduler
o Continued work with the programmer and ORL to outline the specifications for and functioning of the self-scheduler
o Continued programming on the framework of the Self-Scheduler
o Programmed email/SMS messages
- Daily Deliverables Specifications
o Continued to elaborate the structure for daily call records and scheduler records deliverables.
o Made edits to draft data deliverables from the sample management system based on feedback from programmers and ORL.

Tasks 6, 7: Interviewer Recruitment & Hiring, Training
- Prepared paperwork to appoint/hire on-staff interviewers, team leaders and production coordinator
- Conducted recruitment interviews for field and Survey Services Laboratory interviewers
- Continued weekly meetings to plan the training agenda, training logistics, etc.
- Prepared RFP for training facilities

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 Requiring Attention:

• Schedule – The development and testing schedule remains tight; programming is progressing. SRO will keep ORL updated on progress.

o In ORL and SRO agreed to delay the launch of interviewer training by two weeks. General interviewing techniques training will be held March 26 – 27, and study specific training will be held March 28-31. Interviewers will begin working April 2, and the first interviews will be taken on April 4.

• Programming

o ORL testing was suspended on January 7, 2022 due to routing bugs in Sections B, C, and D. SRO is working with the programming team to address errors and is assessing the Blaise programming progress.

☐ ORL resumed testing on February 9, 2022

o A change to the self-scheduler was requested and approved on January 14. This change will delay integrated testing with the scheduler by approximately two weeks.

o Programming hours for the sample management system are running higher than anticipated due to issues with the revised household roster, coordination with the self-scheduler and the addition of the QR codes and messages.

• COVID-19/Training Accommodations

o One very experienced team leader will attend training virtually. The TL will function as a round robin leader for any interviewers who may be unable to attend in-person training for any reason. In addition, as much as possible, the training presentations will be recorded.

• COVID-19/Interviewer Equipment – all Survey Services Lab interviewers will be given a cell phone and a laptop. This will enable the interviewers to either work remotely or work in the Lab. There will be an increase in project costs due to this change. The cost for cell phones is $65 per person per month in direct cost. We estimate that the project will need about 37 additional cell phones for the five months of production, resulting in a cost increase of approximately $12,025 in direct cost.

• Funding – The funding allocated from NIH funding to SRO was less than the budgeted amount. ORL has indicated in a brief email message that it will make up the difference in direct costs up to the budgeted (and approved amount), a deficit in indirect costs shows on the financial statement because of the difference in indirect costs between ORL and NIH. The indirect cost difference can be ignored, and will be reconciled at the end of the study. The project will be managed to the direct cost total.

o SRO will need a formal written commitment from ORL to supplement direct cost funding up to the budgeted amount plus any work scope changes.

o SRO will prepare a budget for the difference between the estimated cost-to- complete and NIH funding, as well as the approved work scope changes. A budget will be prepared after interviewer training in order to assess/take into account the actual cost of training (which is expected to be lower than budgeted).

• Interviewer training – Study specific interviewer training was budgeted for five days. The study will not require five full days of in-person training. Projections for training have been initially reduced by the estimated equivalent of one day. The training plan is being developed and may result in further adjustments.

Approved Work Scope Changes

As of January 27, 2022, $36,351 direct cost in work scope changes were approved.

• October 28, 2021 $15,663 in estimated direct costs (approximately 180 programmer hours) was approved for programming related to customization of the Self Scheduler

• November 16, 2021 $5,640 in estimated direct costs (58 programmer hours plus 20 tester hours) was approved for programming over and above the budgeted level of changes

• January 14, 2022 $2,698 in estimated direct costs (25 programmer hours) for updates to the self-scheduler work flow for the confirmation page

• January 24, 2022 $12,350 in estimated direct costs to supply the Survey Services Lab interviewers, team leaders and production manager with cell phones that will allow them to work from the Lab or remotely. This projected expense is added as a COVID-risk mitigation measure.

• Jan 24, 2022 – Interviewer training was delayed by two weeks.

Cost **Feb 08, 2022**	*Total Cost to Date (Direct + Indirect):*	172,525.93
	Estimated Cost at Completion (E$AC):	2,194,246.95
	Total Budget:	2,124,151.00
	Variance (Budget minus E$AC):	-70,095.95
	Reason For Variance:	The projected variance is due to approved work scope changes. We have a commitment from the research team to pay for the work scope increases. Once training costs are known, we will prepare a formal budget to cover the scope increases.

Projections
Feb 08, 2022

Dollars Projected For Month:	70,200.69
Actual Dollars Used:	68,883.69
Variance (Projected minus Actual):	1,317.00
Reason For Variance:	Hours projected for interviewers to assist with QC planning and recruitment were not used.

Measures

	Units Complete	RR	HPI
Current Goal:	2670	89%	5.0 Tel, 10.0 Field
Goal at Completion:	2670	89%	
Current actual:			
Estimate at Complete:			
Variance:			

Other Measures

Project Name	(EDC-SS Phases 3-4) Every Dollar Counts Semi-Structured, Phases 3-4
Project Mode	Primary: Telephone Secondary: Face to Face Total of Modes: 2
Project Type	Sponsored Projects

Project Status Current

Budget   *Direct Budget:*   314,566.00   *InDirect Budget:*   94,369.00   *Total Budget:*   408,935.00

Principal Investigator/Client	Jessica Wiederspan (OpenResearchLab) Elizabeth Rhodes (OpenResearchLab)
Funding Agency	OpenResearchLab
IRB	*HUM#:* HUM00164105 *Period Of Approval:* 1/1/2022-12/31/2022
Project Team	*Project Lead:* Karin Schneider *Budget Analyst:* Megan Gomez-Mesquita *Production Manager:* Barbara Aghababian-Homburg *Senior Project Advisor:* Nicole G Kirgis *Production Manager:* *Production Manager:*
Proposal #:	no data
Description:	Semi-Structured (Qualitative) interviews of a panel of respondents to the larger EDC Baseline/Midline studies. The same respondents are asked to do six qualitative interviews over the course of the three-year EDC program (1-1.5 hour iws). Phases 3 and 4 are separated by eight months. Phase 3 conducted by phone from November 2021 - January 2022. Phase 4 is planned as in-person starting in August 2022 and running through the end of the calendar year. SRO sample is 129 cases. 122 were successfully interviewed for Phase 3 (two cases are presently being confirmed by the ORL (PI) team as incarcerated or deceased). Kirsten Alcser was SPA for Phase 3.
SRO Project Period	10/2021 - 01/2023
Data Col Period	11/2021 - 12/2022
Security Plan	NA
Milestone Dates	

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

Other Project Team Members:	Ashwin Dey, Becky Loomis, Andrea Pearce, Marsha Skoman, Peter Sparks, Stephanie Windisch
Other Project Names:	"Phase 3/4" is often referred to as "Round 3/4"
Sample Mgmt Sys	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	DRI-CXM
Incentive	Yes, R
Administration	SRO Group
Payment Type	NA
Payment Method	Check through other system (API through STrak to PI's payment system)

Report Period	Jan, 2022 (EDC-SS Phases 3-4) **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	Our actual project cost in January came out almost equal to our projected cost for the month. There were some slight over and underruns in January between cost categories, but overall they cancelled out. There are minimal projections over the next few months as the project goes into a hiatus while the EDC Midline interviews are completed. We resume in August.
Special Issues	

Cost
Feb 16, 2022

Total Cost to Date (Direct + Indirect):	120,912.67
Estimated Cost at Completion (E$AC):	410,158.64
Total Budget:	408,935.00
Variance (Budget minus E$AC):	-1,223.64
Reason For Variance:	Only slight over/underruns in some labor categories.

Projections
Feb 16, 2022

Dollars Projected For Month:	23,058.86
Actual Dollars Used:	23,896.59
Variance (Projected minus Actual):	-837.73
Reason For Variance:	Only minimal projections for the next several months.

Measures

	Units Complete	RR	HPI
Current Goal:	129	95	5.0
Goal at Completion:	129	95%	5.0
Current actual:	122		5.1
Estimate at Complete:	122		5.0
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:* 1,466,538.00	*InDirect Budget:* 821,264.00	*Total Budget:* 2,287,802.00

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:	Barbara Lohr Ward
	Budget Analyst:	Parina Kamdar
	Production Manager:	Veronica Connors-Burge
	Senior Project Advisor:	Nicole G Kirgis
	Production Manager:	Taghreid Lovell
	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 - 03/2023
Data Col Period	05/2022 - 12/2022
Security Plan	No
Milestone Dates	

PreProduction Start:	05/01/2019	*Pretest Start:*	11/12/2019
Pretest End:	12/13/2019	*Recruitment Start:*	
Staffing Completed:		*GIT Start:*	
SS Train Start:		*SS Train End:*	
DC Start:		*DC End:*	

Other Project Team Members:	Taghreid Lovell, Veronica Connors-Burge, Lisa Van Havermaet, Steven Sonoras, 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)
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	Jan, 2022 (H&WB)	**Project Phase**	Initiation
Risk Level	*Attention!*		

Monthly Update   During January 2021, SRC activities on the DAWN projects included the following:
Task 1: Management, Budget and Work Plan
- Held biweekly meetings with the DAWN research team
- o Began detailed review of the DAWN studies design in order to prepare rebudgets
- Reviewed monthly expenses. Updated labor and non-labor projections
- Prepared preliminary budget specifications for rebudgets for D-Amp and SRS

• Continued review of D-Amp technical systems documentation in preparation for re-starting the study technical systems. Reviewed outstanding Blaise and SurveyTrak programming issues.
• Interviewer Training
o Continued review and revision of 2020 Spring training agenda. Gathered input from D-Amp team members regarding training time needed for assessments.
☐ Reviewed HRS time estimates for physical measure/biomarker training and adjusted DAWN agenda based on HRS requirements
☐ Prepared spreadsheets to model time and labor required for certifications
☐ Prepared a comparison of DAWN assessments to HCAP assessments
o Refined estimates of interviewer/team leader hours required for training, as well as estimates of regular staff hours required for conducting single or merged trainings
• Continued inventory of study supplies remaining from the 2020 planned launch of D-Amp. Gathered preliminary estimates for purchase of biomarker supplies and other study supplies
• Prepared design for kits. Submitted design to vendor for cost estimate

Task 2: Sampling
• Attended meetings, responded to questions regarding design

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
• Continued work on creating documentation for training on cognitive assessments. Revised pilot training slides.

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:
- Schedule – the studies are behind schedule for a Spring 2022 launch, due to pending decisions on sample design and scope.
o A draft schedule prepared for a June training is extremely aggressive, and requires timely decisions on design in order to meet key deadlines necessary for launch.
o Spring/early summer is peak time for conference facilities in the area due to weddings and graduations. If UM Dearborn is not available, the project may have limited availability and experience higher costs for use of conference facilities.
- Training budgets and projections
o The April 2020 D-Amp training plan was longer than stated six days of study specific training plus ½ day of Arabic training, however the projections did not reflect the actual number of training hours required. The actual training agenda requires 8 days of in-person training, without considering the CDR home study or other home study. In addition, the D-Amp training hours projections covered only 19 interviewers, and not the 25 interviewers planned.
o The SRS 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 which requires 8 days of training including certifications. SRS was budgeted for five days of study specific training, which includes the ½ day of Arabic language questionnaire review.
o The SRS 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 the two-day GIT.
- The SRS project management budget is extremely lean and is not be adequate for a project of this size and complexity.
- The D-Amp projections for project management are insufficient for launch, interviewer training and management/oversight of data collection nor support of interviewers.
- The D-Amp project did not include projections for programming needs, nor did it includes sufficient projections for weekly delivery of data.
- Increases in interviewer pay rates and some recharge rates have led to projections of deficits on both SRS 2022 and D-Amp. The impact on D-Amp is substantial.
- The SRS budget does not include a budget for informant interviews or proxy interviews. This is an area of scope that needs to be reconciled with the current D-Amp survey work scope.
- Saliva samples expiration – Saliva samples purchased for the 2020 launch of D-Amp will expire before the planned 2022 launch. These samples cannot be used per the ISR Biolab and will need to be replaced.

Cost
Feb 08, 2022

Total Cost to Date (Direct + Indirect):	1,010,766.05
Estimated Cost at Completion (E$AC):	2,527,150.92
Total Budget:	2,287,802.00
Variance (Budget minus E$AC):	-239,348.92
Reason For Variance:	Work scope will be modified to bring the project scope into alignment with the available budget. The project is being rebudgeted to provide an accurate view of cost to complete. Existing projections for the work to complete D-Amp are insufficient in almost all areas.

Projections
Feb 08, 2022

Dollars Projected For Month:	450.26
Actual Dollars Used:	2,410.07
Variance (Projected minus Actual):	-1,959.81
Reason For Variance:	Several incorrect charges hit the project. These charges are being reversed.

Measures

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

Other Measures

Project Name	(HCAP 2020) Harmonized Cognitive Assessment Protocol, 2020
Project Mode	Primary: Face to Face Secondary: Telephone
Project Type	Sponsored Projects

Project Status   Current

Budget	***Direct Budget:***	3,300,000.00	***InDirect Budget:***	1,188,000.00	***Total Budget:*** 4,488,000.00

Principal Investigator/Client   Kenneth Langa (SRC)
David Weir (SRC)

Funding Agency

IRB   ***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

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   Jan, 2022 (HCAP 2020)   **Project Phase**   Planning

Risk Level   *On Track*

Monthly Update   We are targeting early July, 2022 for the HCAP interviewer training and production start, 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.
HCAP 2020 (which will likely be named HCAP 2022) pre-production activities are starting. Just two days ago 2/14,

HCAP sample was flagged in the HRS sample file. We will begin mapping where R's are located so that we can plan for staffing and trainings. We are reviewing all updates that were made to the instruments in preparation for production in 2020 to confirm that all changes are accounted for so we can pick up again on making updates and testing. Internal staffing is being decided on.

Special Issues

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

Cost
Feb 16, 2022

Total Cost to Date (Direct + Indirect):	184,845.25
Estimated Cost at Completion (E$AC):	4,319,860.42
Total Budget:	4,488,000.00
Variance (Budget minus E$AC):	168,139.58
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
Feb 16, 2022

Dollars Projected For Month:	736.57
Actual Dollars Used:	765.45
Variance (Projected minus Actual):	-28.88
Reason For Variance:	Time was charged to the HCAP R24 acct for work with Ireland.

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:	[Updated 09/2021] This project refers to two distinct releases which comprise the 2021 "Off-Year Mail Study" - (1) A Spring effort (n=~14,000, data collection running from June-September, 2021) and (2) a Fall effort (n=~6000, data collection running from October, 2021-March, 2022). Following the model of past off-year mail studies, most HRS panel respondents will be sent a paper booklet, as well as a prepaid incentive by check, and will be asked to complete the paper survey and mail back to Ann Arbor via prepaid return materials. Logging of paper booklets will take place in Ann Arbor, where booklets will be packaged and shipped to an external vendor, DataForce, for scanning and data-export. This study will follow a Dillman-like reminder sequence - initial mailing, followed by up to three reminder mailings (booklet #2, postcard, booklet #3). An external vendor, DataForce, will handle (1) formatting, printing and mailing of the booklet (in English and Spanish); (2) sending reminder mailings to each batch of sample; and (3) scanning completed booklets and delivering data to SRO for processing and delivery. The sample size for this project is significantly larger than other "off-year" mail studies such as LHMS. Relatedly, and also unlike past instances of HRS off-year mail studies, this project's sample is not distinct from that of HRS CAMS; all HRS CAMS participants were asked to complete the COVID Survey as part of the Spring effort. Key differences between the Spring and Fall efforts: (1) Distinct sample (also from among existing HRS panel) (2) Several revisions to the questionnaire (3) Changes to management team The Spring and Fall HRS COVID Survey / OYMS efforts are under the same Project/Grant and costs are tracked jointly; however, the two efforts have distinct sets of shortcodes, so "effort"-level cost monitoring is possible where needed.
SRO Project Period	03/2021 - 05/2022
Data Col Period	05/2021 - 03/2022
Security Plan	NA
Milestone Dates	

PreProduction Start:	03/01/2021	*Pretest Start:*	
Pretest End:		*Recruitment Start:*	
Staffing Completed:		*GIT Start:*	
SS Train Start:	06/08/2021	*SS Train End:*	06/08/2021
DC Start:	05/28/2021	*DC End:*	03/31/2022

Other Project Team Members:	Technical Leads: Ian Ogden & Jim Rodgers
	MSMS Developers: Pam Swanson & Jim Rodgers
	Data Manager: Laura Yoder
	Project Support 1: Jeannie Baker (Replacing Becky Scherr, as of late-June, 2021)
	Project Support 2: Melissa Luker (Spring Only)
	Project Support 3: Debra Heier (Locating, Spring Only)
	Project Support 4 (RPay & Mailing-Support Only, Spring): Anna Fuqua-Smith
	Project Support 5 (RPay & Mailing-Support Only, Fall): Daniah Buageila
	Production Manager: Pooja Varma-Laughlin (Spring Only)
	Production Manager / Scheduler: Kelley Popielarz (Fall Only)
Other Project Names:	HRS 2021 Off-Year Mail Study
	HRS 2021 OYMS (COVID) / OYMSF
Sample Mgmt Sys	SRS 2021 & OMS Mailer
Data Col Tool	NHRS 2021 Spring COVID Survey / Fall COVID Survey
Hardware	HRS 2021 Perspectives on the Pandemic Survey
DE Software	Other (MSMS DCA)
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, prepaid (25.00)
Payment Method	Check through STrak RPay System

Report Period	Jan, 2022 (HRS 2021 OYMS / COVID S **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	[Case Status & "Partials" - SRO Proposal Approved in Mid-January, 2022]

After discussion at several levels, in mid-January, 2022 the SRC-HRS team approved an SRO proposal which made two foundational reporting & monitoring changes to this mail survey: To (1) redefine the 1001 result code to refer to "non-blank questionnaire received" (i.e. at least one question answered) and (2) forgo the retroactive recoding of certain cases to "1005" (Accepted Partial Questionnaire).

This was proposed for a number of reasons and may set precedent for future HRS mail studies. Please see Ian for further details, if desired.

[Spring Release]
Returns from the Spring effort have fallen to only a few per month. As the logging infrastructure for the project remains up and running, the SRC-HRS team have agreed with a proposal to continue logging Spring questionnaires until Fall data collection concludes.

[Fall Release - Data Collection]
Logging and processing activity have reached a volume where SSL Loggers are no longer regularly staffed on the project (though some ad-hoc shifts are possible). The SRC-HRS team have agreed with a proposal to continue data collection until two weeks elapse with zero returns. Given the Spring effort's extended response, it is unclear when this may be - we currently anticipate ending data collection in March or perhaps early-April.

The response for the Fall effort through week 17 remains 4-5 percentage points behind that of the Spring effort at the same point in production. It is unclear whether the Fall release will reach a 60% response.

Special Issues	(1) [Ongoing] Coordinating with the HRS PM Team as 2022 production begins and in anticipation of the COVID-Survey MSMS project remaining active concurrently with HRS 2022 Production.

(2) [Ongoing] Potential impact of reduced USPS Service Standards on response by week, logging projections, material-consumption and respondent burden.

(3) [Ongoing] (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).

Cost
Feb 08, 2022

Total Cost to Date (Direct + Indirect):	1,327,061.58
Estimated Cost at Completion (E$AC):	1,224,236.37
Total Budget:	1,333,924.00
Variance (Budget minus E$AC):	109,687.63
Reason For Variance:	The EAC is currently lower than the total cost to date due to projected credits for unredeemed respondent payments / checks in the future (in May, 2022 and September, 2022).
	We are currently projecting an underrun of ~$110K. Primary drivers are: (1) Lower-than-expected RR from the Spring effort; (2) Likely lower-than-expected RR from the Fall effort; (3) Fewer full-time staff (inc. management & day-to-day operations) being available into the fall, shifting key production tasks to contingent Survey Techs.

Projections
Feb 08, 2022

Dollars Projected For Month:	48,728.01
Actual Dollars Used:	39,512.91
Variance (Projected minus Actual):	9,215.10
Reason For Variance:	Various costs came in below projections; primary contributors: (1) Salary Costs (a fair bit lower than projected due to diminishing returns of completed questionnaires): ~$3K; (2) Indirect Costs: ~$2,400; (3) Processed Check-Voids: ~$2,300 (3) Services-of-Others (DataForce): ~$1K.

Measures

	Units Complete	RR	HPI
Current Goal:	15,700	80.0%	N/A
Goal at Completion:			
Current actual:	11,518	58.9%	
Estimate at Complete:			
Variance:			

Other Measures   Note: Production figures above include both the Spring (largely concluded) and Fall (ongoing) efforts.

Units Completed & RR by Release (as of 2/15/2022):

```
        n, IW  |   RR
Spring | 8,353 |  60.5%
Fall   | 3,165 |  55.0%
```

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	03/2022 - 04/2023
Security Plan	NA

Milestone Dates

PreProduction Start:	01/01/2021	*Pretest Start:*	11/01/2021
Pretest End:	11/23/2021	*Recruitment Start:*	08/01/2021
Staffing Completed:	01/15/2022	*GIT Start:*	02/21/2021
SS Train Start:	02/23/2022	*SS Train End:*	03/03/2022
DC Start:	03/07/2022	*DC End:*	04/15/2023

Other Project Team Members:	Derek Dubuque (Production Manager), Andrew Hupp Project Manager), Kallan Larsen (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 (WBD), $20 (SAQ))
Payment Method	Check through STrak RPay System; Check through other system (Rpay system set up for MSMS); Interviewer p

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Report Period	Jan, 2022 (HRS 2022 Panel) **Project Phase** Initiation
Risk Level	*Some Concerns*
Monthly Update	During the month of January the team focused on technical development, systems testing, IRB submissions, training coordination, sample assignments, preload QC, and TL/PC training. Main training is scheduled for February 23 through March 3 2022 with production beginning March 7, 2022.

Special Issues

-Fifteen interviewers withdrew from the project because of concerns about travel, attending a lengthy in person training and the possibility of conducting in person interviews. Some of these staff are considering attending a training planned for late summer/fall 2022.
- Contingency plans are in place to ensure that staff who develop symptoms during training are able to continue with training via Zoom. A plan is also in place to ensure that food is delivered to these staff.

Cost
Feb 08, 2022

Total Cost to Date (Direct + Indirect):	1,259,372.13
Estimated Cost at Completion (E$AC):	16,511,910.95
Total Budget:	16,508,390.00
Variance (Budget minus E$AC):	-3,520.90
Reason For Variance:	The projected overrun is primarily due to non-salary. CRS is now projecting the contingent fringe benefits with the newly approved 10.4% rate to accommodate ACA costs, the $400 signing bonus for field staff, Field interviewer and SurveyTech base rate increase, an extra day added to February production training, the increase in per mile reimbursement for travel and moving some.

Projections
Feb 08, 2022

Dollars Projected For Month:	407,494.13
Actual Dollars Used:	217,315.05
Variance (Projected minus Actual):	-190,179.08
Reason For Variance:	January was under projections due to a combination of salary and non-salary items. Non-salaried expenses for postage, PM/Bio supplies, hotel/conference, printing, licensed trail making forms procurement, and travel were under. Future projections have been adjusted.

Measures

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

Other Measures

Project Name	(HRS2022-NewCohort) HRS 2022 - Screening
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

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	Jan, 2022 (HRS2022-NewCohort) **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	Sampling/Listing: Address sorting wrapped up in January. IRB: An amendment was submitted to the IRB with some production changes. The pretest wrapped up data collection in December. 1,500 total cases

1,291 - screener not completed
209 - screeners completed
  170 -screeners completed via interviewer-administration (in-person + phone)
  39 - screeners completed via self-administration (web + paper)
   41 - Eligible (EGENX + MOC)
   168 - Ineligible
    112 - No eligible respondent
    17 - Pre-Id MGENX

A meeting was held with the PI on January 17, to update of the sample stratification plan. The sampling team is getting together info on the breakdown of the pre-Id cases. Another meeting is scheduled February 16 to hopefully finalize the design.

Sample stratification will be re-done after additional commercial data (MSG) is obtained. There are ~10,000 addresses from the 2016 sample coded as NER due to Age or Year of B (YOB) of R. These addresses will be added to the 2022 sample frame and are expected to yield Older Cohort Minority eligible households. Earlier we had obtained commercial data for only 3,000 of these addresses using only YOB to identify them. Using YOB and Age adds another 7,000 addresses to the frame.

There are pending decisions from the sampling group for the screener before specifications can be finalized. Short timeline to implement changes prior to training system freeze date.

Working with the PIs to finalize the screener observation specifications by 1/12. Programming changes will be for production. Current screener observations are sufficient for training.

Tech/project management team is discussing design improvements for reporting status of the web screener sample.

Special Issues

Cost
Feb 16, 2022

Total Cost to Date (Direct + Indirect):	1,684,938.43
Estimated Cost at Completion (E$AC):	24,901,390.25
Total Budget:	24,277,856.00
Variance (Budget minus E$AC):	-623,534.25
Reason For Variance:	The projected overrun decreased slightly in January (~$30,000). Hours worked overall were less than projected.

Projections
Feb 16, 2022

Dollars Projected For Month:	509,344.69
Actual Dollars Used:	258,067.29
Variance (Projected minus Actual):	251,277.40
Reason For Variance:	--Staff hours in January were lower than projections by 18%.

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. Updated 11/22: Eliminated grad students, staff, and faculty from sample frame. Only undergraduate instrument will be fielded. This was based on feedback from LSA.
SRO Project Period	10/2021 - 01/2022
Data Col Period	11/2021 - 12/2021
Security Plan	NA

Milestone Dates

PreProduction Start:	10/18/2021	**Pretest Start:**	
Pretest End:		**Recruitment Start:**	
Staffing Completed:		**GIT Start:**	
SS Train Start:		**SS Train End:**	
DC Start:	11/29/2021	**DC End:**	12/17/2021

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	Jan, 2022 (LSA Space Survey)	**Project Phase**	Closing
Risk Level	*On Track*		

Monthly Update	All data were submitted in December with no need for further weights or adjustments. While the PIs had originally considered requesting some additional coding of the open ended fields to identify specific buildings, this was no longer needed. We are closing out the project. Since billing was done directly to the shortcode, there is no account to close out.
Special Issues	

Cost
Jan 10, 2022

Total Cost to Date (Direct + Indirect):		0.00
Estimated Cost at Completion (E$AC):		0.00
Total Budget:		7,755.00
Variance (Budget minus E$AC):		0.00
Reason For Variance:		

Projections
Jan 10, 2022

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

Measures

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

Other Measures

Project Name	(MARS 2) Malaysia Ageing and Retirement Study Wave 2
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 187,281.00 **InDirect Budget:** 67,421.00 **Total Budget:** 254,702.00
Principal Investigator/Client	David Weir (UM SRC - HRS)

Funding Agency Health and Retirement Study

IRB	**HUM#:** NA	**Period Of Approval:**
Project Team	**Project Lead:**	Margaret Lee Hudson
	Budget Analyst:	Richard Warren Krause
	Production Manager:	
	Senior Project Advisor:	Evanthia Leissou
	Production Manager:	Kasyera Kowalczyk
	Production Manager:	

Proposal #:   no data

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

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

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

Other Project Team Members:

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

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

Report Period	Jan, 2022 (MARS 2)

Project Phase Implementing

Risk Level *On Track*

Monthly Update

The SWRC team is working hard to reach their goals and complete data collection by the end of March 2022. December brought rain and flooding to Malaysia, which affected a number of cities/states resulting in slower than anticipated production. However, production is rebounding in 2022. The team is focusing on completing interviews with panel respondents and returning to complete physical measurements with those who have already completed an interview via telephone.

There are three items about which I am reaching out to HRS PI David Weir for feedback:
1. Continued guidance for the SWRC team on their grant application for HCAP (e.g., sharing the HCAP aims).
2. As MARS Wave 2 data collection wraps up, the SWRC team is preparing for their first experience with preparing and analyzing longitudinal data. They would like to request our assistance with some training and support of analysis. I am requesting to have a few key HRS staff (e.g., Julia Roach) meet with our SRO data manager to help identify key steps in data preparation? In addition, we are looking at summer workshops/classes to suggest to the SWRC team for training on longitudinal data analysis? There are two relevant 2022 Summer Institute classes to consider.
3. Finally, our current MOU with SWRC is through March 2023. The SWRC team desires to continue the established relationship beyond this date, either by extending the current MOU or creating a new one.

Special Issues

Cost
Feb 16, 2022

Total Cost to Date (Direct + Indirect):	227,383.85
Estimated Cost at Completion (E$AC):	235,446.81
Total Budget:	254,702.00
Variance (Budget minus E$AC):	19,255.19
Reason For Variance:	The majority of the variance is to due not having the originally planned international travel expenses in 2020.

Projections
Feb 16, 2022

Dollars Projected For Month:	2,959.30
Actual Dollars Used:	2,355.88
Variance (Projected minus Actual):	603.42
Reason For Variance:	No HelpDesk hours were charged this month as no computer support was required by the SWRC team. Additionally, the data manager only charged 70% of his projected hours due to not having tasks that required the hours.

Measures

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

Other Measures

Project Name	(MI CReSS (Year 2)) 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:** 341,017.00 **InDirect Budget:** 88,663.00 **Total Budget:** 429,680.00
Principal Investigator/Client	
Funding Agency	
IRB	**HUM#:** HUM00181068 **Period Of Approval:** Exempt
Project Team	**Project Lead:** Terri Ann Ridenour
	Budget Analyst: William Lokers
	Production Manager: Ruth B Philippou
	Senior Project Advisor: Nicole G Kirgis
	Production Manager:
	Production Manager:
Proposal #:	no data

Description: 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.

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.

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.

SRO Project Period	08/2021 - 09/2023
Data Col Period	01/2022 - 07/2023
Security Plan	NA

Milestone Dates

PreProduction Start:		**Pretest Start:**	
Pretest End:		**Recruitment Start:**	09/16/2021
Staffing Completed:		**GIT Start:**	
SS Train Start:	11/29/2021	**SS Train End:**	12/02/2021
DC Start:	01/26/2022	**DC End:**	07/07/2023

Other Project Team Members:
Bill Lokers: Financial Analyst
Hueichun Peng: Technical Lead / WSMS db Programmer
Peter Sparks: CAI Programmer (Blaise 5)
Cheng Zhou: Web Component, ADT, Reports
LihShwu Ke: DBA Architecture & Data Security
Sarah Broumand: Data Manager
Gina Cheung: Technical Consultant
Deb Wilson: Help Desk

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	Jan, 2022 (MI CReSS (Year 2))	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update

We delivered another remote, two day Interviewer training this month. Staffing for this project has been challenging.

Production started on January 26. The updated Arabic and Spanish instrument specs were delivered, programmed and tested. We're in the process of training the bilingual Iwers on both instruments.

The PI requested an updated project Year 3 (FY22 / 23) budget to submit to the sponsor (MDHHS). (See: SRO # 21-0067R01C1).

The budget included the cost estimate for adding 650 sample cases (i.e. Release 13-14), shifted data collection timeline and additional scope of work. The proposal team worked on that request and the budget materials were submitted to the PI on 2/4/22. (See file path: L:\projects\MI CReSS\02 Budget\Proposal Docs\Updated Year 3)

Here are some of the other assumptions for Year 3 budget:
--Incorporate 650 sample lines into our existing MI CReSS follow up protocol
--Data collection on these additional sample lines would start ~ March 2023 and conclude July 2023
--Include full protocol: all mailings, all effort, data collection, etc.
--Include the additional mailings (hard-copy reminder letter and thank you card)

Special Issues

Cost
Feb 16, 2022

Total Cost to Date (Direct + Indirect):	110,494.17
Estimated Cost at Completion (E$AC):	442,613.49
Total Budget:	429,680.00
Variance (Budget minus E$AC):	-12,933.49
Reason For Variance:	Of the $341,015 direct Year 2 budget, $101,408 has been spent to-date. We currently project a direct cost overrun of $12,993.

The current projections reflect the latest sample release numbers expected in Year 2 and shifted data collection timeline. The projections include the additional scope of work (e.g. increase of hours for programming the Proxy instrument routing in Blaise, cost to design, update and print the Resource Guide and the additional hard-copy reminder mailings). We've also included cost projections for potential suspected abuse cases requiring mandated reporting.

Projections
Feb 16, 2022

Dollars Projected For Month:	57,965.61
Actual Dollars Used:	35,901.60
Variance (Projected minus Actual):	22,055.01
Reason For Variance:	Interviewer hours and respondent ToAs shifted to February, as we launched data collection at the end of the month.

Measures

	Units Complete	RR	HPI
Current Goal:	1,755	80%	
Goal at Completion:	1,755	80%	
Current actual:	290	50%	
Estimate at Complete:			
Variance:			

Other Measures

This budget assumes we will attain an 80% response rate for respondents completing the follow-up survey (~1,755 completed cases). This is assuming that SRO receives high quality respondent contact information from the PIs/research team and that phone follow-up is implemented with non-responders to the web survey. We estimate approximately 1,755 baseline respondents will complete the follow-up survey. We have budgeted for 1,053 respondents (60%) to complete the self-administered web survey and for approximately 702 respondents (40%) to complete the survey with an interviewer over the telephone.

Project Name	(MTF base year 2017-2022) Monitoring the Future - Base Year 2017-2022
Project Mode	Primary: Class SAQ Total of Modes: 1
Project Type	Sponsored Projects

Project Status Current

Budget	***Direct Budget:*** 4,701,300.00 ***InDirect Budget:*** 2,615,631.00 ***Total Budget:*** 7,316,931.00
Principal Investigator/Client	Richard Miech (Survey Research Center)
Funding Agency	National Institute on Drug Abuse, one of the National Institutes of Health.
IRB	***HUM#:*** 00131235 ***Period Of Approval:*** 2/3/2021 - 2/2/2022
Project Team	***Project Lead:*** Rebecca Gatward
	Budget Analyst: Mary Johnson
	Production Manager: Margaret Lavanger
	Senior Project Advisor: Gregg Peterson
	Production Manager:
	Production Manager:
Proposal #:	no data

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

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

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

(b) panels of high school graduates aged 19-30, 35, 40,45, 50, 55, and 60 (surveyed by mail). Panel members aged 19-30 are sent a questionnaire every other year/asked to complete a web survey and the older sample members are sent questionnaires (mail and web) at five-year interval. The MTF panel study has three parts - early in the year a newsletter is mailed to panel members. If the newsletter is returned (undelivered) locating effort targets these panel members and others who have not participated for X years. The web panel launches (web) in spring and in around June a telephone non-response effort begins for those invited to participate. The panel members are recruited from the 12th graders who participate in the base year study.

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

Milestone Dates

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

Other Project Team Members:

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

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

Report Period	Jan, 2022 (MTF base year 2017-2022)	**Project Phase** Planning
Risk Level	On Track	

Monthly Update

Main tasks in January...
- Prepared and conducted Interviewer training sessions (each interviewer attended three sessions (3 hrs)). We also held two HOPs for interviewers. We redesigned the training this year - including more home study. We will cover the more involved parts of the protocol during conference calls once production begins.
-Testing the portal, illune surveys, WebSMS and SurveyTrak.
- Other pre-production tasks.
- 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. Focus of the team is on creating a SQL database for downloading the data from the portable server and load testing.

Special Issues

Cost
Feb 15, 2022

Total Cost to Date (Direct + Indirect):	6,006,290.04
Estimated Cost at Completion (E$AC):	6,787,235.97
Total Budget:	7,316,931.00
Variance (Budget minus E$AC):	529,695.03
Reason For Variance:	- Wave 1 (2017-18) & Wave 2 (2018-19) - 50 supplemental school admins (not budgeted)

- Wave 2 travel costs were higher than budgeted due to staff availability.
- Wave 3 (2019-2020) - 500 additional tablets were purchased. The cost of these and other necessary equipment was not budgeted.
- Wave 4 (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. During January we began working through reviewing school preference to have an interviewer visit their school to conduct the survey administration or not. We will compare school preference with location of intervuewers assigned to MTF and other factors to decide on type of survey administration. A change in the balance between remote and in-person will affect interviewer hours and travel costs - the over run could be larger than currently projected.

Projections
Feb 15, 2022

Dollars Projected For Month:	186,725.51
Actual Dollars Used:	74,973.75
Variance (Projected minus Actual):	111,751.76
Reason For Variance:	The variance is across salary and non-salary costs. Interviewer and TL hours were lower than projected and Non-salary variance was mainly due to over projection of travel costs in January,

Measures

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

Other Measures

Project Name	(MTF HID 22) MTF High Intensity Drinking 2022
Project Mode	Primary: Web Total of Modes: 1
Project Type	Sponsored Projects

		Project Status	Current

Budget	*Direct Budget:*	301,160.00	*InDirect Budget:*	167,822.00	*Total Budget:*	468,982.00

Principal Investigator/Client	Megan Patrick (University of Michigan)
Funding Agency	
IRB	*HUM#:* 00159183 ***Period Of Approval:*** 2/2/2022
Project Team	*Project Lead:* Donnalee Ann Grey-Farquharson
	Budget Analyst: Parina Kamdar
	Production Manager: Hongyu Johnson
	Senior Project Advisor: Kirsten Haakan Alcser
	Production Manager:
	Production Manager:
Proposal #:	no data
Description:	2022 will be Wave 4 Data Collection.

SRO's work on this project includes administering multiple web surveys to a sample of respondents who participated as 12th graders in Monitoring the Future's (MTF) Base Year study. Using a starting sample of approximately 2000 respondents from MTF, SRO will administer a data collection "burst" consisting of one 30-minute survey and 14 days of 7-minute surveys every 12 months for 4 years. SRO will conduct all surveys as self-administered web surveys, with no telephone contact to respondents. SRO will coordinate all electronic contact with respondents (email and text message), but will not handle any paper mailings, respondent management or the payment of respondent incentives. SRO's activity will start in November 2021, with the first data collection burst in February 2022, lasting through to the third week of April 2022. Deliverables include final copies of the questionnaires (including programming source code), clean and documented data sets from each of the data collection bursts, and a methodological report on protocols.

SRO Project Period	10/2021 - 07/2022
Data Col Period	02/2022 - 04/2022
Security Plan	NA
Milestone Dates	

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

Other Project Team Members:	Kirsten Alcser, Donnalee Grey-Farquharson, Hueichun Peng, Hongyu Johnson, Minako Edgar
Other Project Names:	
Sample Mgmt Sys	Web SMS
Data Col Tool	Illume
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, R
Administration	ISR Group (MTF Study Satff)
Payment Type	Check, post (varies $40 - $100); Other (Tango Card)
Payment Method	Imprest Cash Fund from ISR Business Office; Other (Tango Card)

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Report Period	Jan, 2022 (MTF HID 22)	**Project Phase**	Planning
Risk Level	*On Track*		
Monthly Update	Management:		

- Started the SRO project team structure.
- Set up shortcodes and CRS system
- Coordinated with the Study Team staff on Round2 testing plan

Technical system:
- Set up the 2022 SMS for testing
- worked with the Study team staff on setting up Round 2 testing environment
- setting up testing data delivery environment

Special Issues

Cost
Jan 31, 2022

Total Cost to Date (Direct + Indirect):	279,711.09
Estimated Cost at Completion (E$AC):	352,358.52
Total Budget:	468,982.00
Variance (Budget minus E$AC):	116,623.48
Reason For Variance:	This is the 4th year of the continuous study. The underrun amount is a carry over over the past 3 years. The amount will be adjusted in Feb.2022.

Projections
Jan 31, 2022

Dollars Projected For Month:	12,635.80
Actual Dollars Used:	12,005.67
Variance (Projected minus Actual):	630.13
Reason For Variance:	The study staff team started setting up the sample management system (SMS) and testing plan. The underrun amount will be adjusted in Feb.2022

Measures

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

Other Measures

Project Name	(MTF Panel (main data collection) 2021) Monitoring the Future Panel (web) 2021
Project Mode	Primary: Web Total of Modes: 1

Project Type	Sponsored Projects		**Project Status**	Current

Budget	*Direct Budget:*	729,094.00	*InDirect Budget:*	405,907.00	*Total Budget:*	1,135,001.00

Principal Investigator/Client   John Schulenberg (UM-SRC)

Funding Agency

IRB   *HUM#:*   HUM-0013R02   *Period Of Approval:*   In continuing Review

Project Team
- *Project Lead:*   Donnalee Ann Grey-Farquharson
- *Budget Analyst:*   Mary Johnson
- *Production Manager:*
- *Senior Project Advisor:*   Gregg Peterson
- *Production Manager:*   Rebecca Gatward
- *Production Manager:*

Proposal #:   no data

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

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

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

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

Milestone Dates

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

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

Report Period	Jan, 2022 (MTF Panel (main data collec **Project Phase** Closing
Risk Level	*On Track*
Monthly Update	Project Management:

SRO team have been working with the MTF research team on preparing MTF Panel (Main data collection) 2022 since November 2021. The current cost report figures are still reflected in the MTF Panel 2021 budget due to pending on finalizing 2022 budget.

SRO team have been working on refining SMS and getting ready for testing and production phases.

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Data manager:

-The data collection ended on 10/31/2021.

During this month, only the data manager and the study team members worked on data cleaning and delivery efforts, in addition SRO project team worked on survey questionnaire specification documents editing for year 2018 through 2021.

-Management staff have been actively working on SMS refinement and Survey Questionnaire reviewing to prepare MTF Illume 2022 activities.

Production Data: as of 10/31/2021

Total Sample: 21589

Total completes: 9406

Response Rate: 43.57%

Special Issues

Cost
Jan 31, 2022

Total Cost to Date (Direct + Indirect):	1,129,248.06
Estimated Cost at Completion (E$AC):	1,182,525.45
Total Budget:	1,135,001.00
Variance (Budget minus E$AC):	-47,524.45
Reason For Variance:	The overrun amount is due to pending on finalizing 2022 budget. it will be adjusted in Feb 2022.

Projections
Jan 31, 2022

Dollars Projected For Month:	27,832.06
Actual Dollars Used:	26,573.45
Variance (Projected minus Actual):	1,258.61
Reason For Variance:	The amount of underrun will be adjusted in Feb. 2022

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)

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Report Period   Jan, 2022 (PSID TAS 2021)   **Project Phase**   Implementing

Risk Level   *On Track*

Monthly Update   In Week 19 1/30/22 - 2/5 TAS continues to exceeded the cumulative goal of 1360 by 240 interviews for a total of 1600 interviews and 77.5% completion rate. In the last few weeks production did not meet the weekly goals which need adjustment, however, at this point the project PIs prefer to leave original goals as stated.

TAS is expecting its final Release 4 towards the end of February 2022. Releases 1 (completion = 80.4%), 2

(completion = 73%) and 3 (completion = 62.4%) are all now in the non-response follow-up (NRFU) phase wherein interviewers call the sample and we scaled down the sequenced reminders / text messages.

Despite slow progress and high completion rate, based on conversations with the PIs, we are holding off any end-game interventions until later in the year. But we are mailing a request to FES families asking to pass the survey link information to the target TAS R and to ask them to complete the TAS interview. TAS swapped reminder email subjects for shorter messages with emojis and we noticed a 8pp increase in open rates from 36% to 44%.

The final sequence of interventions will be carried out in April or May and will include welcome-to and welcome-back outreach to new TAS and recons, and more traditional end-game / study ending announcements and incentive increases. We are also preparing for in-person locating work although the details are still under determination.

Active TAS Staff: 27
SSL: 8 Interviewers and 3 TLs (who also are scheduled for interviewing shifts)
Field: 13 Interviewers and 2 TLs
2 Locators (one also a TAS iwer in the SSL)

Technical systems have been working well in the past months. The MSMS server migration took a bit longer and, after the update, we are experiencing some issues with reports / ODS replication. The issues are being addressed now by TSG.

Special Issues

Cost
Feb 08, 2022

Total Cost to Date (Direct + Indirect):	680,873.53
Estimated Cost at Completion (E$AC):	1,333,632.53
Total Budget:	1,299,454.85
Variance (Budget minus E$AC):	-34,177.68
Reason For Variance:	Lower TSG, management, and field iwer hours in January.

Projections
Feb 08, 2022

Dollars Projected For Month:	136,770.63
Actual Dollars Used:	120,623.42
Variance (Projected minus Actual):	16,147.21
Reason For Variance:	Lower TSG, management, and field iwer hours.

Measures

	Units Complete	RR	HPI
Current Goal:	1360	65.7%	n/a
Goal at Completion:	2332	88%	n/a
Current actual:	1600	77.3%	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 Start:**	09/28/2020
Pretest End:	10/25/2020	**Recruitment Start:**	10/15/2020
Staffing Completed:	12/02/2020	**GIT Start:**	
SS Train Start:	02/24/2021	**SS Train End:**	03/05/2021
DC Start:	03/18/2021	**DC End:**	12/31/2021

Other Project Team Members:

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

Report Period	Jan, 2022 (PSID21)	**Project Phase**	Implementing
Risk Level	On Track		

Monthly Update

January work included:

--The assignment of a final state to each sample line for which an interview was not collected. This process was lengthier and more costly than anticipated, despite considerable effort of the team to ensure we understood the best way the process could be carried out with our technical systems.

--Final adjudication of partial interviews (59) and of Web interviews suspended in the RPay section, so eligible to be finalized as 1001s.

--Generation of final splitoffs, coded out non-interview.

--Debriefing with Field/SSL staff via a debriefing feedback form and an Iwer/TL/PC debriefing.

--An SRO Tech Team Debriefing.

--Consolidation of info from the debriefings with observations from the Management Team and PIs into a list of key tech development needs for 2023. The PIs also asked SRO to re-investigate whether an online technical system design (similar to TAS') might meet Core's needs and address the significant, ongoing issues with syncs and data accuracy.

--Delivery of final Blaise and raw MSMS data sets, then delivery of final MSMS dataset cleaned and curated by DMSS.

Special Issues

Cost
Jan 31, 2022

Total Cost to Date (Direct + Indirect):	7,192,491.86
Estimated Cost at Completion (E$AC):	7,296,907.66
Total Budget:	6,887,423.00
Variance (Budget minus E$AC):	-409,484.66
Reason For Variance:	The project has prepared a spreadsheet summarizing the key drivers of cost variance from the rebudget to actuals. Feel free to request it if you'd like more detail than shared below.

Categorization of Cost Variance: Actual vs. Rebudget

The most significant drivers of the overrun were Field Staff Costs, TSG Costs, and Management Costs.

The reason for the overruns vary by category.

Higher salaries were the driver of the Field Staff overrun, not higher hours. Field Staff and SurveyTech costs and hours can also be assessed together since the work they completed was largely the same. Even when assessed together, the hours required were lower than budgeted and the costs were higher.

The hours and cost of Management both overran, however, the driver was the hours.

The TSG overrun was also driven more by hours, than costs.

Overall, the overrun was partly offset by a significant underrun in Survey Tech costs, driven by lower hours, plus smaller underruns in Supplies/Printing, SRO Support Staff, and Postage/Shipping.

Projections
Jan 31, 2022

Dollars Projected For Month:	371,108.83
Actual Dollars Used:	389,307.24
Variance (Projected minus Actual):	-18,198.41
Reason For Variance:	Currently we're projecting a direct cost overrun of $262K, which is a $25K increase from last month. This is mostly due to higher than projected interviewer hours in January for closeout work (particularly the code out team's assignment of final states to each non-final line). We also increased projections for Occ/Ind coding after having assessed costs to-date and the scope of the non-final work. It's important to note that while our projected variance has increased this month, it decreased last month (by more than the amount of this increase).

Measures

	Units Complete	RR	HPI
Current Goal:	9025	84%	7.5
Goal at Completion:	9025	84%	7.5
Current actual:	9244	85.7%	7.5
Estimate at Complete:	9244	85.7%	7.5
Variance:	-219	-1.7	0

Other Measures   Goals reflected revised targets established during production, not original targets.

Project Name	(SCA 2022) Surveys of Consumer Attitudes
Project Mode	Primary: Telephone Total of Modes: 1
Project Type	Sponsored Projects

Project Status Current

Budget	*Direct Budget:* 1,251,758.00 *InDirect Budget:* 0.00 *Total Budget:* 1,251,758.00
Principal Investigator/Client	Richard Curtin (SCA) Tuba Suzer-Gurtekin (SCA)

Funding Agency

IRB

HUM#:   *Period Of Approval:*

Project Team

Project Lead:	Theresa Camelo
Budget Analyst:	Dean E Stevens
Production Manager:	Lisa J Carn
Senior Project Advisor:	Shonda R Kruger-Ndiaye
Production Manager:	
Production Manager:	

Proposal #:	no data
Description:	The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations. The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 600 interviews.
SRO Project Period	12/2021 - 12/2022
Data Col Period	01/2022 - 12/2022
Security Plan	NA

Milestone Dates

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

Other Project Team Members:

Other Project Names:

Sample Mgmt Sys	NA
Data Col Tool	Blaise 4.8
Hardware	Laptop; Desktop; [UM cell] Phone
DE Software	NA
QC Recording Tool	DRI-CXM
Incentive	Not used
Administration	N/A
Payment Type	N/A
Payment Method	N/A

Report Period	Jan, 2022 (SCA 2022)

Project Phase   Initiation

Risk Level	*On Track*
Monthly Update	SCA JAN22 began as scheduled on MON 12/27/2021 - four days earlier than in previous years (usually the monthly study begins on JAN 2 but this year that would've only allowed 10 days for prelim, too short a period to obtain the required 420 interviews), and ended as scheduled on MON JAN 24. We completed 602 (322/180/100) IWs for the month (2 above the 600: 320/180/100 goal) - at a cumulative HPI of 2.85 (0.15 below the budgeted goal of 3.0).

Special Issues   None to note

Cost
Feb 16, 2022

Total Cost to Date (Direct + Indirect):	89,832.94
Estimated Cost at Completion (E$AC):	1,219,098.19
Total Budget:	1,251,758.00
Variance (Budget minus E$AC):	32,659.81
Reason For Variance:	Reduced HPI

Projections
Feb 16, 2022

Dollars Projected For Month:	85,246.98
Actual Dollars Used:	88,193.65
Variance (Projected minus Actual):	-2,946.67
Reason For Variance:	Reduced HPI

Measures

	Units Complete	RR	HPI
Current Goal:	600		3.0
Goal at Completion:	600		3.0
Current actual:	602		2.85
Estimate at Complete:	602		2.85
Variance:	2		-0.15

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:** Nicole G Kirgis **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

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, Taghreid 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	Jan, 2022 (SRS 2022)	**Project Phase**	Initiation
Risk Level	*Some Concerns*		
Monthly Update	During January 2021, SRC activities on the DAWN projects included the following: Task 1: Management, Budget and Work Plan • Held biweekly meetings with the DAWN research team o Began detailed review of the DAWN studies design in order to prepare rebudgets		

- Reviewed monthly expenses. Updated labor and non-labor projections
- Prepared preliminary budget specifications for rebudgets for D-Amp and SRS
- Continued review of D-Amp technical systems documentation in preparation for re-starting the study technical systems. Reviewed outstanding Blaise and SurveyTrak programming issues.
- Interviewer Training
o   Continued review and revision of 2020 Spring training agenda. Gathered input from D-Amp team members regarding training time needed for assessments.
    Reviewed HRS time estimates for physical measure/biomarker training and adjusted DAWN agenda based on HRS requirements
    Prepared spreadsheets to model time and labor required for certifications
    Prepared a comparison of DAWN assessments to HCAP assessments
o   Refined estimates of interviewer/team leader hours required for training, as well as estimates of regular staff hours required for conducting single or merged trainings
- Continued inventory of study supplies remaining from the 2020 planned launch of D-Amp. Gathered preliminary estimates for purchase of biomarker supplies and other study supplies
- Prepared design for kits. Submitted design to vendor for cost estimate

Task 2: Sampling
- Attended meetings, responded to questions regarding design

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
- Continued work on creating documentation for training on cognitive assessments. Revised pilot training slides.

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:

• Schedule – the studies are behind schedule for a Spring 2022 launch, due to pending decisions on sample design and scope.

o A draft schedule prepared for a June training is extremely aggressive, and requires timely decisions on design in order to meet key deadlines necessary for launch.

o Spring/early summer is peak time for conference facilities in the area due to weddings and graduations. If UM Dearborn is not available, the project may have limited availability and experience higher costs for use of conference facilities.

• Training budgets and projections

o The April 2020 D-Amp training plan was longer than stated six days of study specific training plus ½ day of Arabic training, however the projections did not reflect the actual number of training hours required. The actual training agenda requires 8 days of in-person training, without considering the CDR home study or other home study. In addition, the D-Amp training hours projections covered only 19 interviewers, and not the 25 interviewers planned.

o The SRS 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 which requires 8 days of training including certifications. SRS was budgeted for five days of study specific training, which includes the ½ day of Arabic language questionnaire review.

o The SRS 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 the two-day GIT.

• The SRS project management budget is extremely lean and is not be adequate for a project of this size and complexity.

• The D-Amp projections for project management are insufficient for launch, interviewer training and management/oversight of data collection nor support of interviewers.

• The D-Amp project did not include projections for programming needs, nor did it includes sufficient projections for weekly delivery of data.

• Increases in interviewer pay rates and some recharge rates have led to projections of deficits on both SRS 2022 and D-Amp. The impact on D-Amp is substantial.

• The SRS budget does not include a budget for informant interviews or proxy interviews. This is an area of scope that needs to be reconciled with the current D-Amp survey work scope.

• Saliva samples expiration – Saliva samples purchased for the 2020 launch of D-Amp will expire before the planned 2022 launch. These samples cannot be used per the ISR Biolab and will need to be replaced.

Cost
Feb 08, 2022

Total Cost to Date (Direct + Indirect):	59,387.47
Estimated Cost at Completion (E$AC):	4,691,825.92
Total Budget:	4,495,802.00
Variance (Budget minus E$AC):	-196,023.92
Reason For Variance:	The project is being rebudgeted to provide a more accurate prediction of the cost to complete. Work scope will be modified to bring the project back in line with available funds. SRS only included a budget for 5 days of study specific training. Eight days of study-specific training are required, as well as GIT for all interviewers (only 30 interviewers budgeted for GIT).

Projections
Feb 08, 2022

Dollars Projected For Month:	21,703.00
Actual Dollars Used:	16,509.25
Variance (Projected minus Actual):	5,193.75
Reason For Variance:	The study is on hold pending a rebudget. Only a small number of staff are currently engaging in work on the project. Projections have been updated.

Measures

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

Other Measures

Project Name	(STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects

			Project Status	Current	
Budget	*Direct Budget:*	8,196,521.00	*InDirect Budget:* 4,590,892.00	*Total Budget:*	12,809,390.00

Principal Investigator/Client	James Wagner (University of Michigan) Robert Ursano (Uniformed Services University of the Health Scienc) Murray Stein (University of California San Diego)
Funding Agency	Department of Defense
IRB	*HUM#:* HUM00180765 *Period Of Approval:* 6/3/2020 - 6/2/2021

Project Team

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

Proposal #: no data

Description:

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

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

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

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

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

Milestone Dates

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

Other Project Team Members:

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

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

Report Period	Jan, 2022 (STARRS-LS Waves 3 & 4)	**Project Phase**	Implementing
Risk Level	*Some Concerns*		

Monthly Update

- We have released ten replicates (10,686 sample lines) and completed 7,328 interviews as of February 3.
- We continued to troubleshoot the issue of STARRS emails being flagged and ending up in respondents' spam folders. We also continued to investigate areas that might have led to a lower response than normal in Replicate 8.
- We prepared for SHOS-A recruitment calling interviewer training; we specified, programmed and tested changes to our sample management system for handling the recruitment of SHOS-A cases.
- We continued bi-weekly meetings with M&RA to coordinate Safety Plan and respondent locating activities. A quarterly call with the Chief of Chaplains was scheduled for March 2022.
- The ICPSR quarterly report on public data access applications was sent to USUHS.
- We continued to await a formal GSC memo reflecting the 18-month data collection period (including Wave 4 data released for public use), decisions regarding the SHOS-A cohort and adding biospecimen data availability information to ICPSR.
- We actively planned for and/or worked on 18-month Wave 4 (including public data release) and SHOS-A; we have not started any activities on the work to add biospecimen data flags at ICPSR. Note that U-M will need to prepare a formal budget for the biospecimen flags, as only a ballpark was provided previously.
- We assisted in answering a question Dr. Ursano had about how the STARRS ICPSR data were deidentified. We reached out to our ICPSR partners and requested further information on their disclosure risk review process.
- Detailed line item explanations/calculations for the Year 3 budget were sent to USUHS.
- IRB:
o The ORIO for the technical problem, which led to multiple emails being sent to two respondents, was acknowledged by USUHS.
- We received completed Annual Security Training Renewals and provided support to the users/analysts completing them.
- U-M worked to produce artifacts required by AAG for the Annual Security Controls Review.
- Raw Wave 3 data through Replicate 8 were delivered to Harvard.
- The Enclave team worked on installation of R packages in the Linux and Windows environments, issues related to the background check process, and transfer of suicide attempt data to the Great Lakes Cluster.

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

☐   To date, our projected costs for Waves 3 and 4 are higher than anticipated. Areas for the increased cost estimates include a longer survey instrument time for CATI and associated costs for recruiting and interviewing respondents, increased hours for programming instrument changes, and an increase in SRO interviewer base pay rates. We continue to monitor the situation closely.

☐   Wave 3 Challenges

o   The email issue (respondents not receiving our emails in their Inboxes) is gradually improving. We are happy to see Replicate 9's recovery, but it is not yet clear whether it will recover completely with a response rate in line with previous replicates. We had already experienced a somewhat lower response than normal with Replicate 8, prior to the email problem. We have investigated a number of areas that might have led to that lower rate, but have not yet found anything conclusive. The performance of upcoming replicates should be telling. We will continue to monitor closely and investigate issues as appropriate.

o   Wave 3 consent review and approval process – these risks were described in a September 30, 2020 memo to M&RA.

☐   The DHA Privacy Board has approved the DSA modification for the MHS HIPAA form; however, we will not receive any sort of VA prior approval. With the VA, we could be in a situation where we employ a VA HIPAA authorization form that ends up not being acceptable to the VA when it comes time to request health records data for linkage. While unlikely, it's also possible the approved MHS HIPAA form might not be acceptable to the providers of those data.

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

☐   Enclave Support

o   We continue to monitor priorities for Enclave support. We balance the primary Enclave support work with a number of more complex biomarker data support requests, which are outside of the reduced Enclave team scope in the STARRS-LS contract. We prioritize the primary work above other requests in accordance with project goals and to remain within budget/scope. As a result, the biomarker data support requests can take longer to service. As long as requestors are ok with this arrangement, we can continue to manage the work and priorities in this fashion.

☐   Scope additions

o   There are a few cost estimates for new scope that have yet to be made (Table 5 above). As decisions are made, we will work with the research team to schedule and implement this work.

o   We have received some information on additional public use data releases, including release to the NIH National Data Archive. Several unknowns need to be clarified before we can finalize our scope and cost estimates and determine what staffing will be needed for this work.

Cost
Dec 31, 2021

Total Cost to Date (Direct + Indirect):	3,888,172.67
Estimated Cost at Completion (E$AC):	13,134,283.72
Total Budget:	12,809,390.00
Variance (Budget minus E$AC):	-324,893.72
Reason For Variance:	After making updates to the projections, the overall overrun decreased to $324,894 from last month's $464,417, a savings of around $140K. In addition to moving forward some non-salary costs that did not hit the accounts in December, the updates included a correction to (increase) Becky Loomis's hours, removal of Jan 2022 hours for the new SSA (not hired yet), and removal of Juan Carlos's hours Jan-March 2022. .75 FTE under his name have been left in for when/if we are able to secure a replacement for his role.

Projections
Dec 31, 2021

Dollars Projected For Month:	290,080.78
Actual Dollars Used:	161,276.44
Variance (Projected minus Actual):	128,804.34
Reason For Variance:	We were significantly under our projections for the month (Projected: $290,081; actual: $161,276). Some are amounts that we will need to push forward. Respondent payments were $35k under, Equipment was $21k under, and interviewer recharges were under because we could not run the full month of recharges due to the holiday break. A decrease in one staff member's projections for the month also did not make it into projections as requested last month.

Measures

	Units Complete	RR	HPI
Current Goal:		83.8	8.9
Goal at Completion:		83	8
Current actual:		78.7	10.6
Estimate at Complete:		78	10
Variance:		5	-2

Other Measures

	Units Complete	RR	HPI
Current Goal:		83.8	8.9
Goal at Completion:		83	8

Project Name	(VCT) Video Communication Technologies in Survey Data Collection
Project Mode	Primary: Mixed Total of Modes: 3
Project Type	Sponsored Projects

Project Type	Sponsored Projects		**Project Status**	Current
Budget	*Direct Budget:* 241,958.00	*InDirect Budget:* 135,497.00	*Total Budget:*	377,455.00

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

Funding Agency   National Science Foundation

IRB   *HUM#:*   HUM00159711   *Period Of Approval:*   Exempt

Project Team

Project Lead:	Andrew L Hupp
Budget Analyst:	Dean E Stevens
Production Manager:	Pooja Varma-Laughlin
Senior Project Advisor:	Nicole G Kirgis
Production Manager:	
Production Manager:	

Proposal #:   no data

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

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

SRO Project Period	09/2018 - 04/2021
Data Col Period	08/2019 - 11/2019
Security Plan	NA

Milestone Dates

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

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

Other Project Names: Video Communication Technologies

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

- -

Report Period Jan, 2022 (VCT)   **Project Phase** Closing

Risk Level   *On Track*

Monthly Update   POQ rejected the first findings paper. The team is conducting a few analyses and beginning work on edits. The current plan is to submit at Methods, Data, Analyses (MDA) (A online, open-access journal published by GESIS).

The interview effects paper came out as an advance article at JSSAM in December. The survey data sets will be made publicly available via openICPSR.

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):	362,340.97
Estimated Cost at Completion (E$AC):	377,186.09
Total Budget:	377,455.00
Variance (Budget minus E$AC):	268.91
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:	1,623.93
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	1,623.03
Reason For Variance:	Hours projected for GSRA were not used.

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 Start:*** 02/01/2022
Pretest End: 03/05/2022	***Recruitment Start:***
Staffing Completed:	***GIT Start:***
SS Train Start:	***SS Train End:***
DC Start:	***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	Jan, 2022 (WCJ -Remote Pilot)
Project Phase	Implementing
Risk Level	*On Track*

Monthly Update

Project Management:
- Continue to communicate with the PI team and the SRO Admin team on budget
- Actively working on preparing training and production
- Continue to provide oversight on all team tasks
- Reviewed and adjusted Dec 2021. cost report with the financial analyst

Technical System Development and Testing (Component 1):
- Finalized tech development phase
- Continue to develop technical security protocol on devices
- Completed and tested "WJ File Mover" application that remotely transfer data from the field.
- Set up training and Production Blaise Instrument

Hire and Recruitment:
-Welcomed field interviewer on board

Training
-Actively getting training materials
-Conducted 3-day training
- Actively preparing respondent recruitment materials

Production
- Completed recruitment activities (16 families-37 children)
- Prepared week 1 production on 02/01

Special Issues

Cost
Jan 31, 2022

Total Cost to Date (Direct + Indirect):	42,396.28
Estimated Cost at Completion (E$AC):	84,163.68
Total Budget:	102,139.00
Variance (Budget minus E$AC):	17,975.32
Reason For Variance:	This underrun is due to a variety of staff working less hours in Jan 2022 than projected. The amount of the underrun will be adjusted in Feb.2022

Projections
Jan 31, 2022

Dollars Projected For Month:	18,936.20
Actual Dollars Used:	14,400.56
Variance (Projected minus Actual):	4,535.64
Reason For Variance:	This underrun is due to a variety of staff working less hours in Jan.2022 than projected. The amount of the underrun will be adjusted in Feb.2022

Measures

	Units Complete	RR	HPI
Current Goal:	20		
Goal at Completion:	30		
Current actual:	16		
Estimate at Complete:	30		
Variance:			

Other Measures

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

Project Type	Sponsored Projects	**Project Status**	Current
Budget	**Direct Budget:** 62,440.00	**InDirect Budget:** 12,488.00	**Total Budget:** 74,928.00

Principal Investigator/Client	Zeina Mneimneh (University of Michigan) Salma Mawfek Khaled (Qatar University)
Funding Agency	Cambridgeshire and Peterborough NHS Foundation Trust

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

Project Team

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

Proposal #:	no data
Description:	SRC joins Social & Economic Survey Research Institute at Qatar University for the upcoming World Mental Health Study in Qatar to conduct CIDI train-the-trainer training and build a quality assurance tool. The timing expectation is that SRC has an initial working version of the QC tool in time for a January 2020 data collection pilot, then refinements will be made for an October 2020 production launch. The Qatar team will be using the standard CIDI questionnaire instrument (Blaise 5), and they have Blaise programming expertise and their own sample management system. SRC had originally envisioned this as a version of our OLAP Cube, but have since moved away from that and toward a more "ODS"-type approach. SRC scope of work includes CIDI training, methodological designs for in-person and phone call verification, quality control indicators/interventions, and technical designs for quality assurance infrastructure and dashboard, etc.

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

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

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

Report Period	Jan, 2022 (WMH-Qatar)	**Project Phase**	Implementing
Risk Level	*On Track*		
Monthly Update	Worked on plan on additional work that will be done on the upcoming months.		
Special Issues	None		

Cost
Jan 31, 2022

Total Cost to Date (Direct + Indirect):	71,995.85
Estimated Cost at Completion (E$AC):	74,859.74
Total Budget:	74,928.00
Variance (Budget minus E$AC):	68.26
Reason For Variance:	Hours have been reallocated for the upcoming months.

Projections
Jan 31, 2022

Dollars Projected For Month:	1,611.46
Actual Dollars Used:	124.85
Variance (Projected minus Actual):	1,486.61
Reason For Variance:	no more tasks assigned.

Measures

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

Other Measures

Survey Research Operations

Monthly Project Report

Development Initiative and No Data Collection Projects

January 2022

Developmental/Initiative Projects Dashboard

NonArchived Development Initiative and No-DataCol Projects

Project	Type	Status	Project Lead	Jan
TSME 22-Blaise 5 Testing (423562)	Initiatives	Current	Gina-Qian Yang Cheung	🟢
TSME SRO SYS MAINTENANCE-GENERAL (483910)	Initiatives	Current	Jeffrey L Smith	🟢
TSME22 Day in the life of Video	Initiatives	Current	Vivienne Y Outlaw	🟢
TSME22 DCO Tech System Support FY22	Initiatives	Current	Vivienne Y Outlaw	🟡
TSME22 WebTrak/WebLog CF Upgrade (425197)	Initiatives	Current	Hueichun Peng	🟢
TSME22-PIPPA	Initiatives	Current	Mark Simonson	🟢
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	🟢

Developmental Initiatives

(TSME 22-Blaise 5 Testing (423562)) TSME 22-Blaise 5 Testing (423562)
(TSME SRO SYS MAINTENANCE-GENERAL (483910)) TSME SRO SYS
MAINTENANCE-GENERAL(483910)
(TSME22 Day in the life of Video) TSME22-Day in the Life Videos (425201)
(TSME22 DCO Tech System Support FY22) TSME22-DCO Tech System Support (483248)
(TSME22 WebTrak/WebLog CF Upgrade (425197)) TSME22-WebTrak/WebLog ColdFusion Server Upgrade
(425197
(TSME22-PIPPA) PIPPA 2.0 (425198)
(TSME22-QC-Systems (483249)) TSME22-QC-Systems (483249)
(TSME22-SelfSchedUI (483424)) Self-Scheduling Interface for MSMS
(TSME22-ST international (483227)) TSME22 - ST international (483227)

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

Other Project Team Members:

Other Project Names:

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

Report Period	Jan, 2022 (TSME 22-Blaise 5 Testing (₄

Project Phase   Initiation

Risk Level   *On Track*

Monthly Update   Minimum activities

Special Issues

Cost
Feb 15, 2022

Total Cost to Date (Direct + Indirect):	5,953.04
Estimated Cost at Completion (E$AC):	33,629.27
Total Budget:	30,000.00
Variance (Budget minus E$AC):	-3,629.27
Reason For Variance:	Minimum activities

Projections
Feb 15, 2022

Dollars Projected For Month:	0.00
Actual Dollars Used:	2,020.76
Variance (Projected minus Actual):	-2,020.76
Reason For Variance:	No issues

Measures

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

Other Measures

Project Name	(TSME SRO SYS MAINTENANCE-GENERAL (483910)) TSME SRO SYS MAINTENANCE-GENERAL(483910)
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

Project Status Current

Budget	*Direct Budget:* 20,000.00	*InDirect Budget:* 0.00	*Total Budget:* 20,000.00

Principal Investigator/Client

Funding Agency

IRB	*HUM#:*	*Period Of Approval:*
Project Team	*Project Lead:*	Jeffrey L Smith
	Budget Analyst:	Janelle P Cramer
	Production Manager:	
	Senior Project Advisor:	Gregg Peterson
	Production Manager:	
	Production Manager:	

Proposal #:	no data
Description:	This project will be used to support all maintenance/ enhancement needs for applications or systems directly related to the Surveytrak Production database which would include Surveytrak, ST Administration, SRS RT and RCLS to name a few.
SRO Project Period	07/2021 - 06/2022
Data Col Period	
Security Plan	NA

Milestone Dates

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

Other Project Team Members:	Marsha Skoman Pam Swanson Ashwin Dey Jeff Smith
Other Project Names:	Sys Maint General
Sample Mgmt Sys	SurveyTrak
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	Not used
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Jan, 2022 (TSME SRO SYS MAINTEN/	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update

Since July 2021, developers have provided maintenance on the following applications:
• Database codes maintenance, FTP to File Server Mover, RCLS, Respondent Payment System, SRO ID, ST Admin, ST Employee Data Merge (FRED to ST), and SurveyTrak (55.5 hours)
• Each month, developers attend two (60 minute) meetings a month from July – Jan 2022(70 hours)

From Feb- June 2022, developers will provide maintenance on the following tasks:
• Monthly meetings (50 hours) attending two (60 minutes) meeting a month Feb- June (50 hours) for J. Smith, A.

Dey, P. Swanson, M. Skoman, & H. Ackerman
- RCLS – upgrade (8 hours M. Skoman)
- RCLS - allow for deleting of calls (16 hours M. Skoman)
- RPS bugs (8 hours M. Skoman)
- Other (general/ unexpected maintenance) (8 hours M. Skoman)

Once CRS portal has been updated, we will review our fin ops contact and and latest numbers to MPR.

Special Issues

Cost
Jan 07, 2022

Total Cost to Date (Direct + Indirect):	14,795.38
Estimated Cost at Completion (E$AC):	21,929.38
Total Budget:	20,000.00
Variance (Budget minus E$AC):	-1,929.38
Reason For Variance:	Currently in implementation stage.

Projections
Jan 07, 2022

Dollars Projected For Month:	1,426.80
Actual Dollars Used:	1,308.05
Variance (Projected minus Actual):	118.75
Reason For Variance:	We are projecting an under-run

Measures

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

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 Start:**
Pretest End:		**Recruitment Start:**
Staffing Completed:		**GIT Start:**
SS Train Start:		**SS Train End:**
DC Start:		**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 Jan, 2022 (TSME22 Day in the life of Vi **Project Phase** Implementing

Risk Level On Track

Monthly Update The DCO management team will review and give feedback in Feb. We hope to conclude the project in Feb or early March.

Special Issues

Cost
Feb 16, 2022 **Total Cost to Date (Direct + Indirect):** 7,399.89
Estimated Cost at Completion (E$AC): 7,399.89
Total Budget: 12,500.00
Variance (Budget minus E$AC): 5,100.11
Reason For Variance: Some time for this project was used for mapping and the production of training materials for project trainings.

Projections
Feb 16, 2022

Dollars Projected For Month:	437.21
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	437.21
Reason For Variance:	There was no work in Jan as time was spent preparing training materials for our large production projects.

Measures

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

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

Other Project Team Members: Max Malhotra
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	Jan, 2022 (TSME22 DCO Tech System **Project Phase** Implementing
Risk Level	*Some Concerns*
Monthly Update	1. Add batch update Status at the module for batch updates of Team assignment. 2. Allow users to select "Pending Activation" for project assignment records. 3. Add Work Agreement attribute to Basic Tab. 4. Add Work Agreement file for e-file module. 5. Follow up with CMT on the possibility to use WordPress as a replacement for Drupal (ITS). 6. Launch FOTY 2022.
Special Issues	ADD information about the need to update the iwer website

Cost
Feb 16, 2022

Total Cost to Date (Direct + Indirect):	18,737.56
Estimated Cost at Completion (E$AC):	29,204.91
Total Budget:	30,000.00
Variance (Budget minus E$AC):	795.09
Reason For Variance:	na

Projections
Feb 16, 2022

Dollars Projected For Month:	2,966.61
Actual Dollars Used:	3,019.33
Variance (Projected minus Actual):	-52.72
Reason For Variance:	X

Measures

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

Other Measures

The issues with the interviewer website will mean we need funding for an upgrade. TSG staff are reviewing options in Jan 2022 and we will take our plan to the DCO MGT for input and feedback.

Project Name	(TSME22 WebTrak/WebLog CF Upgrade (425197)) TSME22-WebTrak/WebLog ColdFusion Server Upgrade (425197)
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

Project Status Current

Budget *Direct Budget:* 5,000.00   *InDirect Budget:* 0.00   *Total Budget:* 5,000.00

Principal Investigator/Client

Funding Agency

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

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

Proposal #: no data

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

SRO Project Period 07/2021 - 06/2022

Data Col Period

Security Plan Yes

Milestone Dates

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

Other Project Team Members:

Other Project Names:

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

Report Period	Jan, 2022 (TSME22 WebTrak/WebLog **Project Phase** Initiation
Risk Level	*On Track*

Monthly Update
Holly, Joe and Ashwin fully investigated the JDBC issue and the query syntax errors and were able to resolve.
Holly fully tested WebTrak, Web Log and PIPPA on the new test server.
Holly schedule a server upgrade time scheduled on Feb 14.

Special Issues

Cost
Feb 16, 2022

Total Cost to Date (Direct + Indirect):	4,441.76	
Estimated Cost at Completion (E$AC):	10,576.37	
Total Budget:	5,000.00	
Variance (Budget minus E$AC):	-5,576.37	
Reason For Variance:	na	

Projections
Feb 16, 2022

Dollars Projected For Month:	0.00
Actual Dollars Used:	1,634.88
Variance (Projected minus Actual):	-1,634.88
Reason For Variance:	projections for past months are not entered.

Measures

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

Other Measures

Project Name	(TSME22-PIPPA) PIPPA 2.0 (425198)
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

Project Status Current

Budget	***Direct Budget:*** 18,174.00	***InDirect Budget:*** 0.00	***Total Budget:*** 18,174.00

Principal Investigator/Client

Funding Agency

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

Proposal #:	no data
Description:	FY22 work on PIPPA. Overall goal is to enhance metrics by project and incorporate SurveyTrak projects into the PIPPA system.

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

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

Other Project Team Members:	Sarah Broumand, Cheng Zhou, Andrew Piskorowski
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	Jan, 2022 (TSME22-PIPPA)	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update	The focus in January 2022 was setting up TAS and dealing with Olive4 data issues. After more feedback from projects, the system also implemented email protocol for sending reports to the user or interviewer.
Special Issues	

Cost		
Jan 31, 2022	***Total Cost to Date (Direct + Indirect):***	8,906.00
	Estimated Cost at Completion (E$AC):	18,084.00
	Total Budget:	18,174.00
	Variance (Budget minus E$AC):	90.00
	Reason For Variance:	

Projections
Jan 31, 2022

Dollars Projected For Month:	1,366.00	
Actual Dollars Used:	2,038.00	
Variance (Projected minus Actual):	-672.00	
Reason For Variance:		

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 maintaind 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 Start:*
Pretest End:	*Recruitment Start:*
Staffing Completed:	*GIT Start:*
SS Train Start:	*SS Train End:*
DC Start:	*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	Jan, 2022 (TSME22-QC-Systems (483:	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update Archived large tables in Olive to allow for data to be frequently imported into ODS for other reporting such as PIPPA. 73% of the Olive data was archived. This data consisted of Questions and Observations. Metrics used for reporting are already stored in other tables so this should not affect reports. Projects have been notified of where to find this archived data in case it is needed.

Special Issues

Cost
Jan 31, 2022

Total Cost to Date (Direct + Indirect):	10,774.62
Estimated Cost at Completion (E$AC):	22,564.52
Total Budget:	30,000.00
Variance (Budget minus E$AC):	7,435.48
Reason For Variance:	worked has been put on hold until after holidays due to other project priorities.

Projections
Jan 31, 2022

Dollars Projected For Month:	0.00
Actual Dollars Used:	1,742.88
Variance (Projected minus Actual):	-1,742.88
Reason For Variance:	Unexpected changes required to accommodate other applications that use Olive data. Needed to Archive large tables in Olive to allow for data to be frequently imported into ODS for other reporting such as PIPPA.

Measures

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

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

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

Other Project Team Members: James Rodgers - Tech Lead
Holly Ackerman - Developer (MSMS API and other appointment related work)
Peter Sparks - Developer (R facing page)

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 Jan, 2022 (TSME22-SelfSchedUI (4834 **Project Phase** Planning

Risk Level *On Track*

Monthly Update Nothing to report 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). The time remaining for this project is projected April-June 2022.

Special Issues

Cost

Total Cost to Date (Direct + Indirect):   1,363.89
Estimated Cost at Completion (E$AC):   9,917.01
Total Budget: 10,000.00
Variance (Budget minus E$AC):   82.99
Reason For Variance:

Projections

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

Measures

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

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

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
Payment Method	NA

Report Period	Jan, 2022 (TSME22-ST international (4	**Project Phase**	Initiation
Risk Level	On Track		
Monthly Update	Some development work		

Special Issues

Cost **Feb 15, 2022**		
Total Cost to Date (Direct + Indirect):	12,803.85
Estimated Cost at Completion (E$AC):	35,248.56
Total Budget:	40,000.00
Variance (Budget minus E$AC):	4,751.44
Reason For Variance:	new functions in FUM

Projections
Feb 15, 2022

Dollars Projected For Month:	0.00
Actual Dollars Used:	4,731.84
Variance (Projected minus Actual):	-4,731.84
Reason For Variance:	NA

Measures

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

Other Measures