

Survey Research Operations

Monthly Project Report

Sponsored

February 2022



Sponsored Projects Dashboard

NonArchived Sponsored Projects					
Project	Type	Status	Project Lead	Jan	Feb
<i>ACL6</i>	Sponsored	Current	Terri Ann Ridenour		
<i>ACL-LIFE</i>	Sponsored	Current	Terri Ann Ridenour		
<i>AFHS</i>	Sponsored	Current	Rebecca Gatward		
<i>ALS Controls</i>	Sponsored	Current	Rebecca Loomis		
<i>BFY</i>	Sponsored	Current	Piotr Dworak		
<i>C.A.R.E. 2022</i>	Sponsored	Current	Donnalee Ann Grey-Farquharson		
<i>CAMS 2021</i>	Sponsored	Current	Deborah Zivan		
<i>CDS-21</i>	Sponsored	Current	Sarah Crane		
<i>ECHO (Year 6)</i>	Sponsored	Current	Terri Ann Ridenour		
<i>EDC Midline</i>	Sponsored	Current	Barbara Lohr Ward		
<i>EDC-SS Phases 3-4</i>	Sponsored	Current	Karin Schneider		
<i>H&WB</i>	Sponsored	Current	Barbara Lohr Ward		
<i>HCAP 2022</i>	Sponsored	Current	Maureen Joan O'Brien		
<i>HRS 2021 OYMS / COVID Survey</i>	Sponsored	Current	Ian Ogden		
<i>HRS 2022 Panel</i>	Sponsored	Current	Evanthia Leissou		
<i>HRS2022-Screening</i>	Sponsored	Current	Evanthia Leissou		
<i>MARS 2</i>	Sponsored	Current	Margaret Lee Hudson		
<i>MI CReSS (Year 2)</i>	Sponsored	Current	Terri Ann Ridenour		
<i>MTF base year 2017-2022</i>	Sponsored	Current	Rebecca Gatward		
<i>MTF HID 22</i>	Sponsored	Current	Donnalee Ann Grey-Farquharson		
<i>MTF Panel (main data collection) 2021</i>	Sponsored	Current	Donnalee Ann Grey-Farquharson		
<i>PSID TAS 2021</i>	Sponsored	Current	Piotr Dworak		
<i>PSID21</i>	Sponsored	Current	Shonda R Kruger-Ndiaye		
<i>SCA 2022</i>	Sponsored	Current	Theresa Camelo		
<i>SCIP 2021</i>	Sponsored	Current	Maureen Joan O'Brien		
<i>SRS 2022</i>	Sponsored	Current	Barbara Lohr Ward		
<i>SSRC Web Survey</i>	Sponsored	Current	Karin Schneider		
<i>STARRS-LS Waves 3 & 4</i>	Sponsored	Current	Meredith A House		
<i>VCT</i>	Sponsored	Current	Andrew L Hupp		
<i>WCJ -Remote Pilot</i>	Sponsored	Current	Hongyu Johnson		
<i>WMH-Qatar</i>	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*
 (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 2022) *Harmonized Cognitive Assessment Protocol, 2022*
 (HRS 2021 OYMS / COVID Survey) *HRS 2021 Off-Year Mail Study / COVID Survey*
 (HRS 2022 Panel) *Health and Retirement Study 2022*
 (HRS2022-Screening) *HRS 2022 - Screening*
 (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*
 (SCIP 2021) *Sustainability Culture Indicators Project*
 (SRS 2022) *Social Relations 2022*
 (SSRC Web Survey) *Social Science Research Council Web Survey*
 (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). Interviewers 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

Feb, 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

Mar 15, 2022

Total Cost to Date (Direct + Indirect):	816,110.58
Estimated Cost at Completion (E\$AC):	816,110.58
Total Budget:	772,591.00
Variance (Budget minus E\$AC):	-43,519.58
Reason For Variance:	As of this report, \$27,896 direct costs have been spent to-date. The total, projected cost to complete is currently \$27,896.

Projections

Mar 15, 2022

Dollars Projected For Month:	447.15
Actual Dollars Used:	542.94
Variance (Projected minus Actual):	-95.79
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:** 594,846.00 **Indirect Budget:** 333,113.00 **Total Budget:** 927,959.00

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

Funding Agency

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

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

Proposal #: no data

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

SRO Project Period 04/2020 - 08/2021

Data Col Period 02/2021 - 08/2021

Security Plan NA

Milestone Dates

PreProduction Start: 04/01/2020

Pretest End:

Staffing Completed:

SS Train Start: 02/15/2021

DC Start: 02/22/2021

Pretest Start:

Recruitment Start:

GIT Start:

SS Train End:

DC End: 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

Report Period	Feb, 2022 (ACL-LIFE)	Project Phase	Closing
Risk Level	<i>On Track</i>		
Monthly Update	<p>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.</p> <p>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).</p>		
Special Issues	<p>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.</p> <p>A full summary of drivers and amounts attributed to each are as follows:</p> <p>--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)</p> <p>--Data Collection Extension of 14 additional weeks -- from 26 to 40. (\$11,215)</p> <p>--Fringe Benefits increases due to more staff hours being projected than originally budgeted. (\$26,458)</p> <p>--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)</p> <p>--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)</p> <p>--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)</p> <p>--Miscellaneous - other staff hours (Admin, DCO, HR, Meeting Planner, Graphic Designer, SHV) (\$8,803)</p> <p>--Help Desk support costs are exceeding the initial 40 hours included in the proposal budget. (\$4,664)</p>		
Cost			
Mar 15, 2022	Total Cost to Date (Direct + Indirect):	874,306.39	
	Estimated Cost at Completion (E\$AC):	874,306.39	
	Total Budget:	927,959.00	
	Variance (Budget minus E\$AC):	53,652.61	

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 lwer 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
Mar 15, 2022

Dollars Projected For Month: 951.93
Actual Dollars Used: 31.00
Variance (Projected minus Actual): 920.93
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: 09/01/2018
Pretest End:
Staffing Completed:
SS Train Start:
DC Start: 04/21/2020

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

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

Risk Level Some Concerns

Monthly Update February update
 Response on 2/24
 We have received 3605 completed screener forms (RR 16.6%). The eligibility rate is 59.8%. Of the 2154 eligible cases, 1284 have completed the main interview at a response rate of 60%.
 We were asked by the PI group to provide a budget to conduct a web survey - aimed at assessing the Replicate 2 respondents interest in becoming a member of a panel.

Special Issues

Cost
Mar 15, 2022

Total Cost to Date (Direct + Indirect):	2,500,821.53
Estimated Cost at Completion (E\$AC):	2,505,844.08
Total Budget:	2,490,133.00
Variance (Budget minus E\$AC):	-15,711.08
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 alerted the PI to overspend - we will do what we can to minimise the overspend amount. I think the main reason for the overspend is the longer than planned period of SRO involvement (perproduction and data collection) - which resulted in higher project management costs.

Projections
Mar 15, 2022

Dollars Projected For Month:	31,436.33
Actual Dollars Used:	47,999.96
Variance (Projected minus Actual):	-16,563.63
Reason For Variance:	Majority of the variance is from non-salary costs (respondent payments). The variance also includes ~ \$4,500 (124 hrs) incorrectly charged to the AFHS account.

Measures

	Units Complete	RR	HPI
Current Goal:	2000 (main IWs)	33.3%	NA
Goal at Completion:	2000	33.3%	NA
Current actual:	1284	60%	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 (eligibility rate 59%), main RR 66% (n=998).

Rep 2 current ...

Rep 2 sample (n=22,381), current actual screener RR 7% (n=1545), current eligibility rate 69% (n=1070), current main RR 56% (n=600)

Project Name (ALS Controls) ALS Matched Control Recruitment

Project Mode Primary: Web

Project Type Sponsored Projects **Project Status** Current

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

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

Funding Agency

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

Project Team **Project Lead:** Rebecca Loomis
Budget Analyst: Megan Gomez-Mesquita
Production Manager:
Senior Project Advisor: Meredith A House
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:

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 Feb, 2022 (ALS Controls) **Project Phase** Implementing

Risk Level Some Concerns

Monthly Update February 2022: Check-in with the PI team: They are training two new people to replace Blake Swihart, who left last month. Survey competes continue to decline; we only had one complete for the month. It was agreed to continue at a bare minimum until our next check-in in March, when we will discuss closing the account.

Special Issues

Cost
Mar 15, 2022

Total Cost to Date (Direct + Indirect): 89,018.29
Estimated Cost at Completion (E\$AC): 90,359.64
Total Budget: 255,139.51
Variance (Budget minus E\$AC): 164,779.87
Reason For Variance: Mailings continue to be suspended

Projections
Mar 15, 2022

Dollars Projected For Month: 1,341.36
Actual Dollars Used: 1,190.99
Variance (Projected minus Actual): 150.37
Reason For Variance: Mailings continue to be suspended

Measures

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

Other Measures

Project Name	(BFY) Baby's First Years			
Project Mode	Primary: Face to Face Total of Modes: 1			
Project Type	Sponsored Projects		Project Status	Current
Budget	Direct Budget:	5,806,681.00	Indirect Budget:	1,994,180.73 Total Budget: 7,800,861.73
Principal Investigator/Client	Dr. Greg Duncan (University of California - Irvine) Dr. Kimberly Noble (Teachers College Columbia University) Dr. Katherine Magnuson (University of Wisconsin)			
Funding Agency	National Institute of Child Health and Human Development (NICHD)			
IRB	HUM#:	HUM00137963	Period Of Approval:	
Project Team	Project Lead:	Piotr Dworak		
	Budget Analyst:	Janelle P Cramer		
	Production Manager:	Veronica Connors-Burge		
	Senior Project Advisor:	Stephanie A Chardoul		
	Production Manager:	Margaret Lavanger		
	Production Manager:	Michelle Smith		
Proposal #:	no data			
Description:	<p>University of Michigan Survey Research Center (U-M SRC) is contracted to recruit and interview participants for Baby's First Years -- a longitudinal randomized control trial study.</p> <p>The study's full name, listed on sub-contract documents, is Household Income and Child Development in Early Years. The study will draw on a convenience sample of mothers and their newborns in four US metropolitan areas: New York City; Omaha/Lincoln; New Orleans; and Minneapolis. One or two hospitals, listed in this application, will be used as recruiting sites in each area. The study uses a randomized control trial design in which low-income mothers and newborns will be randomly assigned to a treatment group that receives an unconditional income enhancement -- cash payments of \$333 per month—an amount roughly comparable to a variety of income assistance policies in the U.S. and shown to be associated with meaningful improvements for poor children in prior studies—or to a control condition that receives \$20 per month. In both groups, the payments will be made for the first 40 months of the child's life. To understand the impacts of added income on children's development, researchers will assess treatment/control group differences at ages 1, 2 and 3 on measures of cognitive, language, memory, self-regulation and socio-emotional development. Recruitment is scheduled to start in April of 2018, and each follow-up interview will be conducted 12 months later -- close in time to the child's 1st, 2nd, and 3rd birthday. The feasibility of the approach has been established in a one-year pilot conducted in 2014 at the New York Presbyterian Hospital/Columbia University Medical Center.</p> <p>The Principal Investigators are Dr. Greg Duncan from University of California Irvine (UCI), Dr. Kimberly Noble from Teacher's College Columbia University (TCCU), and Katherine Magnuson from University of Wisconsin-Madison (UWM). UCI (Dr. Duncan) and TCCU (Dr. Noble) are the institutions and signatories funding the U-M SRC subcontract from various sources including the National Institute for Child Health and Human Development (NICHD) and private foundations listed in this application. The study research team also includes co-investigators Lisa Gennetian (New York University), and Hiro Yoshikawa (New York University).</p> <p>SRO will be responsible for four interactions with the selected mothers/infants:</p> <ul style="list-style-type: none"> • Baseline will occur immediately (within 24-48 hours) after birth, in the hospital; • Wave 1 will be a telephone interview with the mother when the child is 12 months old; • Wave 2 will be an in-person interview in the family's home that includes survey, developmental assessment, biomarker collection, and video recorded behavioral interaction when the child is 24 months old; • Wave 3 will be an in-person survey done while the mother and child are visiting a lab for other clinical tests when the child is 36 months old. <p>Each data collection phase/wave will be a full 12 months, with Baseline starting in April 2018:</p> <p>Recruitment/Baseline: 04/01/2018 - 03/31/2019 Wave 1: 04/01/2019 - 03/31/2020 Wave 2: 04/01/2020 - 03/31/2021 Wave 3: 04/01/2021 - 03/31/2022</p>			
SRO Project Period	10/2017 - 12/2020			
Data Col Period	04/2018 - 12/2020			
Security Plan	NA			

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

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

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

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

Report Period

Feb, 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 through week 38 03/13 - 03/19 (650 vs. 648). Some of our interviewers are now shared across MTF and other projects and we have been managing and reassigning sample a bit more than in the past to accommodate those shared appointments but so far with no negative impact on production. We continue encountering issues in NOLA as some of our LA respondents are still displaced and in temporary housing and we tread lightly understanding their difficult situations. NY accelerated in the past few weeks and now exceeds goals,

We are also tracking the Age 3-4 follow up effort which started in October 2021. We are now 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 in 90% range. The first draft of the 10-month hand-off protocol has been programmed and discussed with the Data Ops. The Pls are now conducting Age 4 pilots but still deciding on the start date for the Age 4 hand-off and data collection (presumably in July).

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.

Data collection / Sample:

Age 3 results by site through week 34:

	Goal	Actual +/-
OV 650	648	
NE 198	197	
NY 180	189	
MN 81	78	
LA 191	184	

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:

The first draft of the 10-month hand-off protocol has been programmed and discussed with the Data Ops.

Finances:

We have received the funding to zero-out cost overrun.

Special Issues

Cost
 Mar 15, 2022

Total Cost to Date (Direct + Indirect):	6,387,862.00
Estimated Cost at Completion (E\$AC):	7,821,937.91
Total Budget:	7,800,861.73
Variance (Budget minus E\$AC):	-21,076.18
Reason For Variance:	

Note, the budget does not yet reflect one source of funding which will zero out the overrun. All requested funding has been received.

Projections
 Mar 15, 2022

Dollars Projected For Month:	111,370.47
Actual Dollars Used:	86,485.41
Variance (Projected minus Actual):	24,885.06
Reason For Variance:	

Lower project management and interviewing time. Also lower TSG, most of the BFY tech development has been completed in November - January. Age 4 development is so far coming under budget.

Measures

	Units Complete	RR	HPI
Current Goal:	650	65%	7.0
Goal at Completion:	907	91%	7.0
Current actual:	648	65%	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:	<p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p>					
SRO Project Period	10/2021 - 08/2026					
Data Col Period	03/2022 - 02/2026					
Security Plan	NA					
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="width: 50%; vertical-align: top;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>				PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:					
Other Project Team Members:	Donnalee Grey-Farquharson, Sharon Parker, Hongyu Johnson, Keith Liebetreu, James Koopman, Minako Edgar, David Acquaku, Parina Kamdar					

Other Project CARE CSI, CARE SALTOS
Names:
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 Feb, 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 Testing
 -Tested civilian and military survey questionnaire
 -worked with QG to make corrections on survey instruments

 Training
 -started drafting training agenda
 -started preparing training materials (manual, materials development)

 Hiring and Recruitment
 -Finalized staff list

 DMSS
 -Worked with QG and the SRO team to prepare sample preloading
 -Started preparing Reporting systems for production

Special Issues

Cost
Feb 28, 2022

Total Cost to Date (Direct + Indirect):	78,882.78
Estimated Cost at Completion (E\$AC):	4,586,279.37
Total Budget:	4,515,424.00
Variance (Budget minus E\$AC):	-4,586,279.37
Reason For Variance:	We are currently using a hardship account. Projections will be updated soon.

Projections
Feb 28, 2022

Dollars Projected For Month:	42,362.30
Actual Dollars Used:	27,133.86
Variance (Projected minus Actual):	15,228.44
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	<table><tr><td>PreProduction Start:</td><td>06/01/2021</td><td>Pretest Start:</td><td></td></tr><tr><td>Pretest End:</td><td></td><td>Recruitment Start:</td><td></td></tr><tr><td>Staffing Completed:</td><td></td><td>GIT Start:</td><td></td></tr><tr><td>SS Train Start:</td><td></td><td>SS Train End:</td><td></td></tr><tr><td>DC Start:</td><td>09/24/2021</td><td>DC End:</td><td>03/31/2022</td></tr></table>					PreProduction Start:	06/01/2021	Pretest Start:		Pretest End:		Recruitment Start:		Staffing Completed:		GIT Start:		SS Train Start:		SS Train End:		DC Start:	09/24/2021	DC End:	03/31/2022
PreProduction Start:	06/01/2021	Pretest Start:																							
Pretest End:		Recruitment Start:																							
Staffing Completed:		GIT Start:																							
SS Train Start:		SS Train End:																							
DC Start:	09/24/2021	DC End:	03/31/2022																						
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	Feb, 2022 (CAMS 2021)	Project Phase	Closing
Risk Level	On Track		
Monthly Update	General summary for monthly activities: - Decreased logging as a result of decrease returned questionnaires - Continued shipping of completed questionnaires over to study staff - Cost monitoring The response rate is 7.4% less than the budgeted rate. However, for this wave the response rate is 1% higher than the response rate in 2019.		

Special Issues**Cost****Mar 15, 2022**

Total Cost to Date (Direct + Indirect):	440,467.56	
Estimated Cost at Completion (E\$AC):	387,871.80	
Total Budget:	399,597.00	
Variance (Budget minus E\$AC):	11,725.20	
Reason For Variance:	Overall underrun can be attributed to lower than expected salary expenses and larger than anticipated stop payments.	

Projections**Mar 15, 2022**

Dollars Projected For Month:	7,325.57	
Actual Dollars Used:	-4,081.66	
Variance (Projected minus Actual):	11,407.23	
Reason For Variance:	Overall savings are due to stop payments issued during February. In addition, postage expenses that were budgeted to spread over the entire field period were paid out earlier in the field period. Salaried expenses were slightly less than expected for this month.	

Measures

	Units Complete	RR	HPI
Current Goal:	5256	66.4%	
Goal at Completion:	5256	66.4%	
Current actual:	4273	59.0%	
Estimate at Complete:	4273	59.0	
Variance:	983	7.4	

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	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start: 06/01/2021</td> <td style="padding: 5px;">Pretest Start:</td> </tr> <tr> <td style="padding: 5px;">Pretest End:</td> <td style="padding: 5px;">Recruitment Start: 07/12/2021</td> </tr> <tr> <td style="padding: 5px;">Staffing Completed: 09/08/2021</td> <td style="padding: 5px;">GIT Start:</td> </tr> <tr> <td style="padding: 5px;">SS Train Start: 10/28/2021</td> <td style="padding: 5px;">SS Train End: 11/04/2021</td> </tr> <tr> <td style="padding: 5px;">DC Start: 11/08/2021</td> <td style="padding: 5px;">DC End: 06/18/2022</td> </tr> </table>					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
PreProduction Start: 06/01/2021	Pretest Start:														
Pretest End:	Recruitment Start: 07/12/2021														
Staffing Completed: 09/08/2021	GIT Start:														
SS Train Start: 10/28/2021	SS Train End: 11/04/2021														
DC Start: 11/08/2021	DC End: 06/18/2022														
Other Project	Rachel Orlowski Project Consultant														
Team Members:	Peggy Lavanger Production Management QC Support														
	Kallan Larsen Training Coordinator														
	Kasyera Kowalczyk Project Management Support														
Other Project															
Names:															
Sample Mgmt Sys	SurveyTrak														
Data Col Tool	Blaise 4.8														
Hardware	Laptop; [UM cell] Phone														
DE Software	NA														
QC Recording Tool	DRI-CARI														
Incentive	Yes, R														
Administration	NA														
Payment Type	Other (electronic payment)														
Payment Method	Check through STRak RPay System														

Report Period	Feb, 2022 (CDS-21)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	<p>February project work consisted of planning for upcoming FTF NRFU, as well as intervention mapping with the PI team.</p> <p>The project team is planning for the roll-out, by instrument and sample:</p> <p>- End Game incentives</p>		

- FTF (including delivery of cash incentive)
- Time-delimited special offer
- End of Study

Special Issues**Cost****Mar 08, 2022****Total Cost to Date (Direct + Indirect):** 1,188,722.08**Estimated Cost at Completion (E\$AC):** 2,319,864.61**Total Budget:** 2,288,240.00**Variance (Budget minus E\$AC):** 31,624.61**Reason For Variance:**

We're currently projecting a direct cost overrun of \$20K, which is \$20K less than last month's \$40K projection. This reduction was mainly due to slightly less interviewer hours worked in February than projected, but also due to reducing some management projections.

Projections**Mar 08, 2022****Dollars Projected For Month:** 257,235.77**Actual Dollars Used:** 248,272.63**Variance (Projected minus Actual):** 8,963.14**Reason For Variance:**

We had slightly less interviewer hours hit than projected, as well as small underruns in a variety of categories.

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	1886
PCG Blaise interview	1697
Child Blaise interview	966
IVR	710

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

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

Ian Ogden: Project Manager
 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****Data Col Tool****Hardware****DE Software****QC Recording Tool****Incentive****Administration****Payment Type****Payment Method**

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

Report Period

Feb, 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 delivered another, last-minute, 4-day remote training to a new 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, 1,320 women have been recruited in clinics across the state of Michigan. Among those cases, 935 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 150 women to meet their goal of 1,100.

Prenatal Survey 1: 817

Prenatal Survey 2: 631

 [Phase 2: 3-Month Data Collection Summary]

Babies born: 828
 3-month sample released: 770
 3-month interviews completed: 554
 Average attempts / lw: 7.8
 lw length: 46 min.
 Response Rate: 73%
 3-month biospecimen collected: 326

 [Phase 3: Age 4 Protocols]

March 14-16 SRO and MSU delivered an intensive 3-day in-person training at Perry. The following components were covered during the training and competency was measured:

--ECHO National re-consent
 --NIH Toolbox Cognition Battery (Child)
 --NIH Toolbox Cognition Battery (Parent)
 --Height (Child)
 --Height (Parent)
 --Waist Circumference (Child)
 --Waist Circumference (Parent)
 --Skinfold Thickness - Tricep (Child)
 --Skinfold Thickness - Triceps (Parent)
 --Skinfold Thickness Subscapular (Child)
 --Skinfold Thickness - Subscapular (Parent)
 --Blood Pressure
 --Heart Rate (Child)
 --Blood Pressure
 --Heart Rate (Parent)
 --Weight (TANITA Scale; Child)
 --Weight (TANITA Scale; Parent)
 --Bioimpedance (TANITA Scale; Child)
 --Bioimpedance (TANITA Scale; Parent)
 --Saliva (Child)
 --Saliva (Parent)
 --ECHO Eating Habits Questionnaire
 --Urine (Child)
 --Urine (Parent)
 --Hair (Child)
 --Toenails (Child)
 --Teeth (Child)
 --Conners Kiddie Performance Test (Child)
 --SurveyTrak logging

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 (see above for full list).

Prior to training, interviewers and team leaders were required to complete about 12 hours of Pre-Training / Self Study activities outlined below.

--ECHO National's Learning Management System (LMS) modules on all Age 4 protocols
 --My LINC course titled "UMOR_MRP101 - Minors as Research Participants"

Special Issues

This month we had a request for ~300 additional biospecimen ID sets for all prenatal and post-birth protocols. We continue to need the attention and dedication of a data manager to oversee all Phase 1 data management responsibilities. 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**Mar 17, 2022**

Total Cost to Date (Direct + Indirect): 164,329.09

Estimated Cost at Completion (E\$AC): 437,126.79

Total Budget: 427,336.00

Variance (Budget minus E\$AC): -9,790.79

Reason For Variance:

We reviewed the overall Year 6 budget together updated staff projections. We believe it includes sufficient time for SRO to learn protocols, train lwers and administer the Age 4 protocols (REDCap, in-person visit, including assessments, physical measures and specimen 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**Mar 17, 2022**

Dollars Projected For Month: 38,488.58

Actual Dollars Used: 36,558.76

Variance (Projected minus Actual): 1,929.82

Reason For Variance:

3-month interviewer hours, respondent ToAs, postage costs and Age 4 in-person protocol costs (e.g. training, travel and Age 4 lwer hours) were less than projected. We won't start incurring Age 4 in-person protocol expenses until March and early April, as we wrap up training and begin Age 4 in-person visits in the home. We'll continue to update projections to reflect actual costs as we launch these brand new protocols.

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 (University of 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
Data Col Period
Security Plan
Milestone Dates

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

PreProduction Start:

Pretest End:

Staffing Completed: 03/04/2022

SS Train Start: 02/28/2022

DC Start: 04/04/2022

Pretest Start:

Recruitment Start: 01/01/2022

GIT Start: 02/26/2022

SS Train End: 03/31/2022

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)
 EDC

Other Project
Names:

Sample Mgmt Sys

Data Col Tool

Hardware

DE Software

QC Recording Tool

Incentive

Administration

Payment Type

Payment Method

SurveyTrak

Blaise 4.8

Laptop; [UM cell] Phone

N/A

Camtasia

Yes, R

SRO Group; Other (PI Payment)

Cash, prepaid (\$50 Goodwill Token); Cash, post (\$50); Other (\$50 - Kept Appt)

Interviewer payment of cash (reimbursed/reconciled via Tenrox); Other (Electronic payment by PIs)

Report Period

Feb, 2022 (EDC Midline)

Project Phase

Implementing

Risk Level

On Track

Monthly Update

During February 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
- Reviewed monthly project expenses. Updated labor and non-labor projections.
- Conducted continuous rounds of scenario testing, provided updates to Blaise programmers
- Conducted testing in SurveyTrak and the Self-Scheduler.
- Conducted meetings to elaborate the training agenda and training plan.

Task 2: Sampling

- No activity this month

Task 3: Questionnaire Development

- Sent the Spanish version of the questionnaire out for translation.
- o Reviewed returned translations.
- o Began preparing final version for programmers
- Provided updated questionnaire specification to the research team. Ensured that all DK/RF skip patterns were documented.

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 and other 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 Continued programming/testing on the sample management system
- o Prepared preload for testing SurveyTrak and the Self-Scheduler, conducted several rounds of integrated testing, testing payments, sample management system integration with self-scheduler
- Self-Scheduler
- o Made modifications to the entry and update screens to the Self Scheduler
- o Continued refining the programming for the Self-Scheduler
- o Updated email/SMS messages
- o Conducted rounds of testing/bug fixes
- Daily Deliverables Specifications
- o Prepared and delivered test data.

Tasks 6, 7: Interviewer Recruitment & Hiring, Training

- Conducted interviews, prepared paperwork to hire new hires interviewers coordinator
- Continued weekly meetings to plan the training agenda, training logistics, etc.
- Finalized contract for training facilities
- Ordered supplies for training, field interviewers

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:**

- Interviewer recruitment – a number of newly-recruited and on-staff interviewers unexpectedly withdrew from the project during the week of March 7. In discussion with ORL, the following mitigation strategies will be undertaken:
 - o Some interviewers are willing to work more hours, which will help to mitigate the loss of interviewers.
 - o SRO will conduct an on-staff interviewer recruitment for field interviewers, and will plan to conduct a virtual training for those interviewers. The date of the training is TBD.
 - o SRO will also conduct another local recruitment to bring on more Lab interviewers. The date of this training is to be determined.
 - o Dallas face-to-face cases will be handled by travelers.
- Schedule – The development and testing schedule remains tight; programming is progressing. SRO will keep ORL updated on progress.
 - o 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.
 - o The Spanish version of the questionnaire will not be launched until May.
- 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 and programming management to address errors and is assessing the Blaise programming progress.
 - ORL resumed testing on February 9, 2022 and provided sign off on March 11.
 - o A change to the self-scheduler was requested and approved on January 14. This change delayed integrated testing with the scheduler by approximately two weeks.
 - o Programming hours for the sample management system are continuing to run 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.
 - o Projections for the initial training are being adjusted downward
 - o Some of the initial training projection is being pushed forward to cover attrition trainings
 - o

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.

- The project will conduct two attrition trainings. One training will be virtual to on-board experienced field interviewers. One attrition training will recruit new-hire Survey Services Lab interviewers. It is expected that these attrition trainings will not require additional funding

Cost
Mar 07, 2022

Total Cost to Date (Direct + Indirect):	262,116.52	
Estimated Cost at Completion (E\$AC):	2,183,651.14	
Total Budget:	2,124,151.00	
Variance (Budget minus E\$AC):	-59,500.14	
Reason For Variance:	The variance is in line with projections. The client has approved work scope changes (see monthly write up) with a written promise to fund the work scope changes.	

Projections
Mar 07, 2022

Dollars Projected For Month:	103,476.87	
Actual Dollars Used:	89,590.59	
Variance (Projected minus Actual):	13,886.28	
Reason For Variance:	The variance is due to lower than anticipated recruitment expenses, and some programmers not charging the number of hours expected during the month.	

Measures

	Units Complete	RR	HPI
Current Goal:			
Goal at Completion:			
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	<table><tr><td>PreProduction Start:</td><td>Pretest Start:</td></tr><tr><td>Pretest End:</td><td>Recruitment Start:</td></tr><tr><td>Staffing Completed:</td><td>GIT Start:</td></tr><tr><td>SS Train Start:</td><td>SS Train End:</td></tr><tr><td>DC Start:</td><td>DC End:</td></tr></table>					PreProduction Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
PreProduction Start:	Pretest Start:														
Pretest End:	Recruitment Start:														
Staffing Completed:	GIT Start:														
SS Train Start:	SS Train End:														
DC Start:	DC End:														
Other Project Team Members:	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	Feb, 2022 (EDC-SS Phases 3-4)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	<p>In February, we projected to spend only \$1.6K direct cost but actually spent \$2.2K, for a monthly direct cost overrun of \$600. There were some staff who charged a few hours more than projected, leading to the slight overrun. 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.</p>		
Special Issues			

Cost
Mar 11, 2022

Total Cost to Date (Direct + Indirect): 123,771.00
Estimated Cost at Completion (E\$AC): 410,642.00
Total Budget: 408,935.00
Variance (Budget minus E\$AC): -1,707.00
Reason For Variance: Only slight over/underruns in some labor categories.

Projections
Mar 11, 2022

Dollars Projected For Month: 1,600.00
Actual Dollars Used: 2,200.00
Variance (Projected minus Actual): 600.00
Reason For Variance: Only minimal projections for the next several months.

Measures

	Units Complete	RR	HPI
<i>Current Goal:</i>	129	95	5.0
<i>Goal at Completion:</i>	129	95%	5.0
<i>Current actual:</i>	122		5.1
<i>Estimate at Complete:</i>	122		5.0
<i>Variance:</i>			

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:	Tagh Reid 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	<table><tr><td>PreProduction Start:</td><td>05/01/2019</td><td>Pretest Start:</td><td colspan="2">11/12/2019</td></tr><tr><td>Pretest End:</td><td>12/13/2019</td><td>Recruitment Start:</td><td colspan="2"></td></tr><tr><td>Staffing Completed:</td><td></td><td>GIT Start:</td><td colspan="2"></td></tr><tr><td>SS Train Start:</td><td></td><td>SS Train End:</td><td colspan="2"></td></tr><tr><td>DC Start:</td><td></td><td>DC End:</td><td colspan="2"></td></tr></table>					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:		
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:	Tagh Reid 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	Feb, 2022 (H&WB)	Project Phase	Planning
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Risk Level	Attention!
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Monthly Update	<p>During February 2022, SRC activities on the DAWN projects included the following:</p> <p>Task 1: Management, Budget and Work Plan</p> <ul style="list-style-type: none"> • Held biweekly meetings with the DAWN research team to discuss study design and finances. • Prepared cost reports and reviewed monthly expenses. • Reviewed preliminary budgets from the SRO proposal group for D-Amp and SRS o Prepared explanatory documentation of line-item budget changes
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- o Reviewed specifications with the research team and noted adjustments for revisions
- Reviewed and elaborated capacity-to-consent specifications with the research team
- 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
- Placed order for dynamometers (grip strength) for SRS. (Dynamometers were purchased for D-Amp in 2020).

Task 2: Sampling

- Attended meetings, responded to questions regarding design of screener

Task 3: Questionnaire Development

- Began work on screening specification to merge D-Amp and SRS screening.
- Reviewed 2020 questionnaire for insertion of necessary skips for language and skips that might be needed in order to adapt the questionnaire for the SRS study.

Task 4: CAI Programming

- No activity this month

Task 5: Systems Programming

- No activity this month

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:

- Financial – both the D-Amp study and the SRS study will need significant funding in order to implement the studies as desired. The studies are being rebudgeted in order to provide a more accurate view of funds needed to complete the studies as currently designed. Particular areas of concern are:
 - o Increases in interviewer/team leader pay rates on both projects
 - o Increases in training costs are higher on both projects due to a longer than projected training, and the need for more new hires than anticipated (a pandemic-related outcome), and inflationary pressure
 - o Inadequate allocations for project management on both projects
 - o On D-Amp, insufficient cost-to-complete projections for critical project infrastructure
 - o Expiration of the D-Amp saliva kits purchased in 2020
- Schedule – the studies are behind schedule for a Spring/early Summer 2022 launch, due to pending decisions on sample and study design.
 - o A draft schedule prepared for a June/July 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.
- The 2019 SRS funded budget did not include a budget for informant interviews. Some adjustments to the technical systems will be required if informant interviews will not be included in the SRS design.

Cost
Mar 07, 2022

Total Cost to Date (Direct + Indirect): 1,011,386.88

Estimated Cost at Completion (E\$AC): 2,526,338.57

Total Budget: 2,287,802.00

Variance (Budget minus E\$AC): -238,536.57

Reason For Variance:

Increases in interviewer rates, plus a longer than projected training are leading to the overrun. Projections for the project were vastly under-represented, and the project will need significant funds to conduct data collection

Projections
Mar 07, 2022

Dollars Projected For Month:	7,748.98
Actual Dollars Used:	620.83
Variance (Projected minus Actual):	7,128.15
Reason For Variance:	Activity on the project has not started due to significant funding issues. Projections are being updated to reflect a later start (if work scope can be reduced to match available funds).

Measures

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

Other Measures

Project Name (HCAP 2022) Harmonized Cognitive Assessment Protocol, 2022

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: The project name has been updated to HCAP 2022. Data collection was paused during the COVID-19 pandemic, and will follow HRS 2022. 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 01/2022 - 12/2023

Data Col Period 07/2022 - 09/2023

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: 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 Feb, 2022 (HCAP 2022) **Project Phase** Planning

Risk Level On Track

Monthly Update We are beginning pre-production and on track now for an early-mid July, 2022 HCAP interviewer training and production start, to follow HRS 2022. This follows 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. The teams

are being assembled now – PDMG staff is set, TSG staff is almost finalized. The PM and project lead have begun discussions about staffing and will work closely with HRS to share as many interviewers as possible as they are in the same area. There is an HCAP flag in the HRS R-Shiny tool used for HRS mapping. We will have 22 OSer lwers in the July training, 2 TL's, a PC, and a travel coordinator. There will be a 2nd training in the Fall – shooting for October – with an additional 22 interviewers. Discussions with DCS have started in order to determine training location which will likely be in Ann Arbor. Systems development was put on pause after 2020, but we are in a good position to pick up again where we left off. There was a low level of activity on all fronts for the last 2 years while the project was on pause. There should only be small changes to the Blaise instrument. Team meetings will begin the first week of April. Some other items on the radar that are being / will be worked through: Canvas/Olive/Webtrak/Surveytrak/Weblog/Scoring protocols and QC protocols as this is not completely clear from 2016/Spanish/IRB and licensing which project staff is responsible for.

Special Issues

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

Cost

Mar 15, 2022

Total Cost to Date (Direct + Indirect):	186,348.49
Estimated Cost at Completion (E\$AC):	4,312,455.19
Total Budget:	4,488,000.00
Variance (Budget minus E\$AC):	175,544.81
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

Mar 15, 2022

Dollars Projected For Month:	2,218.72
Actual Dollars Used:	1,503.24
Variance (Projected minus Actual):	715.48
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 - 04/2022

Security Plan NA

Milestone Dates

PreProduction Start: 03/01/2021

Pretest End:

Staffing Completed:

SS Train Start: 06/08/2021

DC Start: 05/28/2021

Pretest Start:

Recruitment Start:

GIT Start:

SS Train End: 06/08/2021

DC End: 04/30/2021

Other Project	Technical Leads: Ian Ogden & Jim Rodgers
Team Members:	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	HRS 2021 Off-Year Mail Study
Names:	HRS 2021 OYMS (COVID) / OYMSF
Sample Mgmt Sys	SRTrak & MSMS
Data Col Tool	N/A
Hardware	HRS 2021 Penpals
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 STTrak RPay System

Report Period	Feb, 2022 (HRS 2021 OYMS / COVID §	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	<p>[Production Status]</p> <p>Returns from the Spring release have continued to trickle in (2-3 per month). Returns from the Fall release have slowed significantly to 5-8 per week. The first HRS 2022 prenotification mailing was sent on 3/4/2022 and we are seeing a very slight surge in returns, but still anticipate closing data collection / suspending further logging by mid-April.</p> <p>The response for the Fall effort through week 21 remains 4-5 percentage points behind that of the Spring effort at the same point. It appears unlikely that the Fall release will reach a 60% response.</p> <p>[Data Delivery]</p> <p>The SRC-HRS team have agreed to plan on one more data delivery upon the conclusion of data collection (inc. Spring & Fall).</p>		
Special Issues	[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.		
Cost			
Mar 09, 2022	Total Cost to Date (Direct + Indirect):	1,336,314.58	
	Estimated Cost at Completion (E\$AC):	1,188,751.74	
	Total Budget:	1,333,924.00	
	Variance (Budget minus E\$AC):	145,172.26	
	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 ~\$145K. 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 being throughout the fall data collection, shifting key production tasks to contingent Survey Techs.	
Projections			
Mar 09, 2022	Dollars Projected For Month:	40,722.79	
	Actual Dollars Used:	9,253.00	
	Variance (Projected minus Actual):	31,469.79	

Reason For Variance:

Primary Drivers: (1) Services-of-Others projections (and consequently, Indirect Costs) were outdated for February (~\$19K projected (direct); actuals in 02/2022 = \$0; resulted in total underrun of ~\$26K including Indirect); (2) ~\$1,400 in voided checks; (3) Slightly lower-than-projected salary costs (\$1-2K).

Measures

	Units Complete	RR	HPI
Current Goal:	15,700	80.0%	N/A
Goal at Completion:			
Current actual:	11,542	59.0%	
Estimate at Complete:			
Variance:			

Other Measures

Units Completed & RR by Release (as of 3/15/2022):

n, IW | RR
 Spring | 8,356 | 60.5%
 Fall | 3,186 | 55.4%

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	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> PreProduction Start: 01/01/2021 Pretest End: 11/23/2021 Staffing Completed: 01/15/2022 SS Train Start: 02/23/2022 DC Start: 03/07/2022 </td> <td style="width: 50%; vertical-align: top;"> Pretest Start: 11/01/2021 Recruitment Start: 08/01/2021 GIT Start: 02/21/2021 SS Train End: 03/03/2022 DC End: 04/15/2023 </td> </tr> </table>				PreProduction Start: 01/01/2021 Pretest End: 11/23/2021 Staffing Completed: 01/15/2022 SS Train Start: 02/23/2022 DC Start: 03/07/2022	Pretest Start: 11/01/2021 Recruitment Start: 08/01/2021 GIT Start: 02/21/2021 SS Train End: 03/03/2022 DC End: 04/15/2023
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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					

Report Period	Feb, 2022 (HRS 2022 Panel)	Project Phase	Planning
Risk Level	On Track		
Monthly Update	The team focused on an IRB submission, preload quality checks, technical development, systems testing, interviewer supplies, precontact mailing preparations, interviewer training, sample assignments, and prod test in preparation for a March 7 start to panel data collection. The project team conducted a nine-day training from Feb 23 to March 3 with 133 interviewers at the Southfield Westin. As noted in the January MPR, we had contingency plans in		

place to offer Zoom training sessions when needed. We used this contingency plan with 1 interviewer for 1 day. The safety measures used for this large, in-person training were successful.

Goals and actuals listed in the measures table are current as of March 15. A total of 13,209 sample cases are currently released in the field. This sample is English speaking. Approximately 2400 are 'Travel' cases and were not mailed precontact letters. They were released with the goal to organize trips and will receive precontact letters just ahead of the planned trip.

Special Issues

To successfully complete the HRS 2022 project, we will need to recruit another group of interviewers who we anticipate training in the fall of 2022.

Cost

Mar 15, 2022

Total Cost to Date (Direct + Indirect): 2,697,041.93
Estimated Cost at Completion (E\$AC): 16,499,628.53
Total Budget: 16,508,390.00
Variance (Budget minus E\$AC): 8,761.47
Reason For Variance: The projected underrun is primarily due to salaries. 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.

Projections

Mar 15, 2022

Dollars Projected For Month: 1,828,177.62
Actual Dollars Used: 1,437,669.80
Variance (Projected minus Actual): 390,507.82
Reason For Variance: The variance for this month is primarily due to salary, postage, shipping, printing, supplies, services of others, respondent tokens and travel. Projections have been adjusted but note that we've let \$26k in supplies drop as we don't need as much interviewer equipment as was budgeted.

Measures

	Units Complete	RR	HPI
Current Goal:	366	2.7	13.6
Goal at Completion:	16,266	74.0	9.0
Current actual:	239	2.2	13.71
Estimate at Complete:	16,266	74.0	9.0
Variance:	0	0	0

Other Measures

Project Name	(HRS2022-Screening) 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:	<p>The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample.</p>												
SRO Project Period	02/2021 - 01/2024												
Data Col Period	03/2022 - 01/2024												
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start:</td> <td style="padding: 5px;">Pretest Start:</td> </tr> <tr> <td style="padding: 5px;">Pretest End:</td> <td style="padding: 5px;">Recruitment Start:</td> </tr> <tr> <td style="padding: 5px;">Staffing Completed:</td> <td style="padding: 5px;">GIT Start:</td> </tr> <tr> <td style="padding: 5px;">SS Train Start:</td> <td style="padding: 5px;">SS Train End:</td> </tr> <tr> <td style="padding: 5px;">DC Start:</td> <td style="padding: 5px;">DC End:</td> </tr> </table>			PreProduction Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
PreProduction Start:	Pretest Start:												
Pretest End:	Recruitment Start:												
Staffing Completed:	GIT Start:												
SS Train Start:	SS Train End:												
DC Start:	DC End:												
Other Project Team Members:													
Other Project Names:													
Sample Mgmt Sys	SurveyTrak; Other ((Blaise) Case Management App (CMA))												
Data Col Tool	Blaise 5												
Hardware	Laptop; [UM cell] Phone; Paper and Pencil												
DE Software	N/A												
QC Recording Tool	Camtasia; N/A												
Incentive	Yes, R; Yes, INF												
Administration	SRO Group												
Payment Type	Check, post; Cash, post												
Payment Method	Check through STRak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest C												

Report Period	Feb, 2022 (HRS2022-Screening)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	<p>The PI signed off on the sample design on 2/21. The sampling team needed a couple of weeks to select the sample. After that the selections were given to Data Ops so that SIDs could be assigned (SIDs come from HRS staff). Data Ops prepared a file for project manager (Daniah) to provide to DataForce for the Release 1 web mailings. Data ops needed a week to prep the file and Daniah will needed a few days to prepare everything (web sample files, web letter templates) to provide to DataForce. DataForce needs 5-7 business days to print and assemble the web invitations. The field invitation information will be provided at a later date since that mailing</p>		

happens six weeks after the web launch (to coincide with the transition of non-responding web cases to the field).

The first group of interviewers were trained in February in Southfield. A second training is planned for late summer/early fall. The interviewers were trained on screening. There will be a series of follow-ups during team meetings with more screening details as we get closer to launching in the field.

The team is testing the screening instrument. The timeline could be affected depending on how testing goes.

IRB: An amendment is being prepared to archive documents that are no longer being used in research. The number of documents associated with HRS is currently causing issues (for the IRB) so documents no longer being used are going to be removed. Screening needs to submit an amendment related to Spanish screening that will need to be approved prior to beginning. We believe that amendment should go quickly once we are able to submit, but this could also affect when we are able to start web screening (Spanish needs to be ready at the start since we won't know who will speak Spanish).

Technical systems are being reviewed and developed to ensure they meet our needs.

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

The team has been working on documentation for how half-open interval (Type I) updates and Type II updates will be handled. DMSS will review and provide feedback. This documentation will be used as the basis for training on this topic prior to the start of field screening.

Andrew met with DMSS to discuss the result codes and rates. Andrew was reviewing the SurveyTrak and reporting specs and discovered the project was using some result codes incorrectly. This along with an item that came up in discussions about the half-open interval will be discussed with DMSS in March.

The team will be working on some updates to procedures, documentation, etc. based on feedback from training.

Weekly screening goals will be prepared in March.

Special Issues

Cost

Mar 08, 2022

Total Cost to Date (Direct + Indirect):	1,967,623.55
Estimated Cost at Completion (E\$AC):	24,792,072.50
Total Budget:	24,277,856.00
Variance (Budget minus E\$AC):	-514,216.50
Reason For Variance:	The projected overrun decreased slightly in February (~\$109,000). Hours worked overall were less than projected.

Projections

Mar 08, 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 February were lower than projections by 25%.

Measures

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

Other Measures

Project Name	(MARS 2) Malaysia Ageing and Retirement Study Wave 2				
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 2		
Project Type	Sponsored Projects	Project Status	Current		
Budget	Direct Budget: 187,281.00	Indirect Budget: 67,421.00	Total Budget: 254,702.00		
Principal Investigator/Client	David Weir (UM SRC - HRS)				
Funding Agency	Health and Retirement Study				
IRB	HUM#: NA	Period Of Approval:			
Project Team	Project Lead: Margaret Lee Hudson Budget Analyst: Richard Warren Krause Production Manager: Senior Project Advisor: Evanthia Leissou Production Manager: Kasyera Kowalczyk Production Manager:				
Proposal #:	no data				
Description:	<p>The Social Wellbeing Research Centre (SWRC) at the University of Malaya is conducting the second wave of data collection for the MARS study, including questionnaire revision, questionnaire translation into Mandarin and Malay, and instrument technical redesign in order to incorporate Wave 1 preload information. In this effort, SWRC will revisit n=5,613 respondents from the first wave, as well as 1,000 additional households from which they will select up to three eligible respondents. The first wave of MARS included up to three randomly-selected members from each household aged 40 and older. The average interview length is expected to be 70 minutes. Data collection will be conducted in English, Malay, and Mandarin.</p>				
SRO Project Period	01/2020 - 09/2021				
Data Col Period	09/2020 - 08/2021				
Security Plan	NA				
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="text-align: center; vertical-align: top;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>			PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:				
Other Project Team Members:	Jay Lin Technical Lead Gina Cheung Technical Advisor Peter Sparks Blaise Programmer Holly Ackerman WebTrak Programmer John Gawlas HelpDesk Specialist Genise Pattulo HelpDesk Supervisor Cheng Zhou Database Administrator LihShwu Ke Database Administrator Marsha Skoman SurveyTrak Intl Programmer Ashwin Dey SurveyTrak Offline Brad Goodwin Data Manager Emmanuel Ellis HelpDesk Specialist (back up)				
Other Project Names:					
Sample Mgmt Sys	Other (ST International)				
Data Col Tool	Blaise 4.8				
Hardware	Laptop				
DE Software	NA				
QC Recording Tool	N/A				
Incentive	Not used				
Administration	N/A				
Payment Type	N/A				
Payment Method	N/A				

Report Period Feb, 2022 (MARS 2) **Project Phase** Implementing

Risk Level On Track

Monthly Update The project team is preparing to wrap up MARS 2 data collection at the end of March 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. Brad and I have been meeting with the team more frequently to address data issues and other wrap up tasks to stay ahead of things in the final months.

There are three items about which I am awaiting feedback from HRS PI David Weir (note: feedback received 3/14):

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
Mar 15, 2022

Total Cost to Date (Direct + Indirect):	231,251.94
Estimated Cost at Completion (E\$AC):	239,571.84
Total Budget:	254,702.00
Variance (Budget minus E\$AC):	15,130.16
Reason For Variance:	No international travel at the start of the project due to pandemic.

Projections
Mar 15, 2022

Dollars Projected For Month:	3,941.19
Actual Dollars Used:	3,868.09
Variance (Projected minus Actual):	73.10
Reason For Variance:	

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:	<p>MI CReSS is a partnership between the University of Michigan School of Public Health (SPH) and the Michigan Department of Health and Human Services. It is a public health surveillance study to learn about Michiganders' experiences with COVID-19 using a representative sample of confirmed cases within the state. Using survey data, they plan to document sociodemographic inequities in COVID-19 testing, treatment, and recovery.</p> <p>SRO's involvement includes the administration of a Follow-up survey for respondents that completed a Baseline survey with the SPH team. Based on the sample information provided, we will be re-contacting approximately 3,995 respondents who have already completed (or are estimated) to complete the Baseline survey to administer the Follow-up survey.</p> <p>The Follow-up survey is estimated to be 45 minutes in length, and Respondents will be encouraged to complete the survey by web. However, SRO Interviewers will contact non-responders and conduct the interview over the telephone if the Respondents do not want to complete the survey on the web.</p>						
SRO Project Period	08/2021 - 09/2023						
Data Col Period	01/2022 - 07/2023						
Security Plan	NA						
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: 11/29/2021 DC Start: 01/26/2022 </td> <td style="width: 50%; vertical-align: top;"> Pretest Start: Recruitment Start: 09/16/2021 GIT Start: SS Train End: 12/02/2021 DC End: 07/07/2023 </td> </tr> </table>					PreProduction Start: Pretest End: Staffing Completed: SS Train Start: 11/29/2021 DC Start: 01/26/2022	Pretest Start: Recruitment Start: 09/16/2021 GIT Start: SS Train End: 12/02/2021 DC End: 07/07/2023
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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 Feb, 2022 (MI CReSS (Year 2)) **Project Phase** Implementing

Risk Level On Track

Monthly Update Staffing for this project has been challenging and we've experience attrition. Production started on January 26 and we've already had to replace 5 lwers/TL. The Arabic and Spanish instrument have programmed, tested and signed off by our bi-lingual SRO staff. Arabic Interviews are now available to be conducted in Arabic and Spanish.

The PI and team delivered an updated instrument that requires structural changes. The changes have been programmed and we are currently in the process of migration testing.

Special Issues

Cost
Mar 18, 2022

Total Cost to Date (Direct + Indirect):	182,063.24
Estimated Cost at Completion (E\$AC):	431,718.70
Total Budget:	429,680.00
Variance (Budget minus E\$AC):	-2,038.70
Reason For Variance:	Of the \$341,015 direct Year 2 budget, \$144,494 has been spent to-date. We currently project a direct cost overrun of \$2,038.

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 updated instruments 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
Mar 18, 2022

Dollars Projected For Month:	50,348.96
Actual Dollars Used:	52,863.53
Variance (Projected minus Actual):	-2,514.57
Reason For Variance:	We had more data management hours and interviewer hours than what we had projected for the month.

Measures

	Units Complete	RR	HPI
Current Goal:	2,152	80% (60%-Web/40%Tel)	2.25
Goal at Completion:	1,755	80% (60%-Web/40%Tel)	
Current actual:	480	59% (60%-Web/40% Tel)	3.31
Estimate at Complete:			
Variance:			

Other Measures

Telephone follow-up is implemented with non-responders to the web survey. We expect 60% respondents to complete the self-administered web survey and for approximately 40% to complete the survey with an interviewer over the telephone. Here is the Year 2 sample replicate totals and expected response rates and HPI.

2689	Y2 Sample
2152	80% RR Rate
1292	60% Web
860	40% Phone
2.25	HPI Telephone
0.25	HPI Web Reminder

Project Name (MTF base year 2017-2022) Monitoring the Future - Base Year 2017-2022

Project Mode Primary: Class SAQ Total of Modes: 1

Project Type Sponsored Projects **Project Status** Current

Budget **Direct Budget:** 4,701,300.00 **Indirect Budget:** 2,615,631.00 **Total Budget:** 7,316,931.00

Principal Investigator/Client Richard Miech (Survey Research Center)

Funding Agency National Institute on Drug Abuse, one of the National Institutes of Health.

IRB **HUM#:** 00131235 **Period Of Approval:** 2/3/2021 - 2/2/2022

Project Team **Project Lead:** Rebecca Gatward
Budget Analyst: Mary Johnson
Production Manager: Margaret Lavanger
Senior Project Advisor: Gregg Peterson
Production Manager:
Production Manager:

Proposal #: no data

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

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

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

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

SRO Project Period 04/2017 - 04/2022

Data Col Period 02/2018 - 06/2022

Security Plan Yes

Milestone Dates

PreProduction Start: 04/30/2017

Pretest End:

Staffing Completed:

SS Train Start:

DC Start:

Pretest Start:

Recruitment Start:

GIT Start:

SS Train End:

DC End: 06/04/2022

Other Project

Team Members:

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

Other Project

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

Report Period	Feb, 2022 (MTF base year 2017-2022)	Project Phase	Implementing
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Risk Level	On Track
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Monthly Update	<p>Main tasks in February...</p> <ul style="list-style-type: none"> - conducted final interviewer trainings - although some training will happen during conference calls once production begins. - Final system testing. - Launched data collection - the first survey administration took place on 2/15. - By end February, the survey had been completed in 20 schools by a mix of 8th, 10th and 12th grade students - in around half of these schools, an interviewer was present to proctor the survey at the school. - 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.
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Special Issues

Cost		
Mar 07, 2022	<p>Total Cost to Date (Direct + Indirect):</p> <p>Estimated Cost at Completion (E\$AC):</p> <p>Total Budget:</p> <p>Variance (Budget minus E\$AC):</p> <p>Reason For Variance:</p>	<p>6,138,721.07</p> <p>6,674,828.18</p> <p>7,316,931.00</p> <p>642,102.82</p> <ul style="list-style-type: none"> - Wave 1 (2017-18) & Wave 2 (2018-19) - 50 supplemental school admins (not budgeted) - Wave 2 travel costs were higher than budgeted due to staff availability. - Wave 3 (2019-2020) - 500 additional tablets were purchased. The cost of these and other necessary equipment was not budgeted. - Wave 4 (2020-2021) - below budget because data collection was halted on 13 March (due to COVID pandemic all FTF research was halted). All data collection costs were below those projected. - Wave 5 (2021-2022) Current projections assume a 50/50 split between remote and in-person survey administrations in schools. 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 interviewers 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		
Mar 07, 2022	<p>Dollars Projected For Month:</p> <p>Actual Dollars Used:</p> <p>Variance (Projected minus Actual):</p> <p>Reason For Variance:</p>	<p>253,211.48</p> <p>132,431.03</p> <p>120,780.45</p> <p>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 February. Overnight for March travel are not being booked as far in advance as I had estimated.</p>

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

Other Measures

Project Name	(MTF 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	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="padding: 5px;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>			PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:				
Other Project Team Members:	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)				

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

- Started the SRO project team structure.
- Set up short codes 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
- Extensively testing

Special Issues

Cost
Feb 28, 2022

Total Cost to Date (Direct + Indirect): 287,012.83
Estimated Cost at Completion (E\$AC): 347,042.32
Total Budget: 468,982.00
Variance (Budget minus E\$AC): 121,939.68
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 March.2022.

Projections
Feb 28, 2022

Dollars Projected For Month: 12,321.86
Actual Dollars Used: 7,301.74
Variance (Projected minus Actual): 5,020.12
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 March.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:	<p>This project is a continuation of MTF Illume Web 2020. The new budget has been combined with previous to allow for "additional funding" of the continuing portion and includes some development/programming work for 2021.</p> <p>PI staff will edit and test 12 survey versions, all previously programmed in Illume by SRO. SRO will further test the surveys as part of the systems integration process. All 12 surveys will be launched in 2021. After testing is complete, SRO will launch the 2021 Web survey data collection with an estimated sample size of 20,000 cases identified by the Principal Investigator who will deliver the contact information including e-mail address to SRO. The Web survey data collection will replace aspects of the standard mail-based data collection. Both the separately funded Winter Location calling effort and Non-Response follow-up calling will include this sample – with the calling effort being integrated with the standard MTF activities.</p> <p>This budget assumes an overall SRO involvement period of 12 months commencing in January 2021 with the data collection taking place during a 7-month period, beginning April of 2021. The total cost for this work is estimated at \$355,783 (\$228,066 direct, \$127,717 indirect), budgeted at the currently negotiated on-campus recovery rate of 56%.</p>					
SRO Project Period	01/2021 - 12/2021					
Data Col Period	04/2021 - 10/2021					
Security Plan	NA					
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="width: 50%; text-align: center; vertical-align: top;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>				PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:					
Other Project Team Members:	Gregg Peterson (SPA), Rebecca Gatward (Director), Donnalee Grey-Farquharson (Lead), Hueichun Peng, Lloyd Hemingway, Shaowei Sun, Minako Edgar, Peter Sparks, Ashwin Dey, Hongyu Johnson					
Other Project Names:	MTF Illume Web 2021					
Sample Mgmt Sys	Web SMS; Project specific system (RLM, RIMS)					
Data Col Tool	Illume					
Hardware	NA					
DE Software	N/A					
QC Recording Tool	N/A					
Incentive	Yes, Other (Managed by SRC PI Staff)					
Administration	N/A					
Payment Type	N/A					
Payment Method	N/A					

Report Period Feb, 2022 (MTF Panel (main data collection) **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**

Feb 28, 2022

**Total Cost to Date (Direct + Indirect):** 1,149,700.99

**Estimated Cost at Completion (E\$AC):** 1,176,454.38

**Total Budget:** 1,135,001.00

**Variance (Budget minus E\$AC):** -41,453.38

**Reason For Variance:** The overrun amount is due to pending on finalizing 2022 budget. it will be adjusted in March 2022.

**Projections**

Feb 28, 2022

**Dollars Projected For Month:** 26,753.39

**Actual Dollars Used:** 20,452.93

**Variance (Projected minus Actual):** 6,300.97

**Reason For Variance:** The amount of underrun will be adjusted in March. 2022

**Measures**

|                                                                                                                                  | Units Complete | RR | HPI |
|----------------------------------------------------------------------------------------------------------------------------------|----------------|----|-----|
| <b>Current Goal:</b><br><b>Goal at Completion:</b><br><b>Current actual:</b><br><b>Estimate at Complete:</b><br><b>Variance:</b> |                |    |     |

**Other Measures**

|                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
|----------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|-----------------------------------|----------------------------------------|----------------------------------|--------------------------------|--------------------------------------|---------------------------------------|------------------------------|-----------------------------------|---------------------------------|-----------------------------|---------------------------|
| <b>Project Name</b>                    | (PSID TAS 2021) Transition to Adulthood within its Life Course & Intergenerational Family Context                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>Project Mode</b>                    | Primary: Web                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Secondary: Telephone               | Total of Modes: 2                 |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>Project Type</b>                    | Sponsored Projects                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <b>Project Status</b>              | Current                           |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>Budget</b>                          | <b>Direct Budget:</b> 832,983.88                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <b>Indirect Budget:</b> 466,470.97 | <b>Total Budget:</b> 1,299,454.85 |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>Principal Investigator/Client</b>   | Narayan Sastry (U-M PSC SRC)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>Funding Agency</b>                  | NIH                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>IRB</b>                             | <b>HUM#:</b> HUM00112629                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <b>Period Of Approval:</b>         | 7/14/2021 - 7/13/202              |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>Project Team</b>                    | <b>Project Lead:</b> Piotr Dworak<br><b>Budget Analyst:</b> Megan Gomez-Mesquita<br><b>Production Manager:</b> Elizabeth Ohryn<br><b>Senior Project Advisor:</b> Stephanie A Chardoul<br><b>Production Manager:</b> Daric Thorne<br><b>Production Manager:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>Proposal #:</b>                     | no data                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>Description:</b>                    | <p>TAS 2021 is the 9th Wave of TAS study, part of the PSID Suite of projects.</p> <p>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.</p>                                                                                  |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>SRO Project Period</b>              | 06/2021 - 07/2022                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>Data Col Period</b>                 | 09/2021 - 06/2022                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>Security Plan</b>                   | NA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>Milestone Dates</b>                 | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"><b>PreProduction Start:</b> 05/01/2021</td> <td style="padding: 5px;"><b>Pretest Start:</b> 05/01/2021</td> </tr> <tr> <td style="padding: 5px;"><b>Pretest End:</b> 08/01/2021</td> <td style="padding: 5px;"><b>Recruitment Start:</b> 08/30/2021</td> </tr> <tr> <td style="padding: 5px;"><b>Staffing Completed:</b> 09/07/2021</td> <td style="padding: 5px;"><b>GIT Start:</b> 09/15/2021</td> </tr> <tr> <td style="padding: 5px;"><b>SS Train Start:</b> 09/30/2021</td> <td style="padding: 5px;"><b>SS Train End:</b> 10/01/2021</td> </tr> <tr> <td style="padding: 5px;"><b>DC Start:</b> 09/30/2021</td> <td style="padding: 5px;"><b>DC End:</b> 06/18/2021</td> </tr> </table> |                                    |                                   | <b>PreProduction Start:</b> 05/01/2021 | <b>Pretest Start:</b> 05/01/2021 | <b>Pretest End:</b> 08/01/2021 | <b>Recruitment Start:</b> 08/30/2021 | <b>Staffing Completed:</b> 09/07/2021 | <b>GIT Start:</b> 09/15/2021 | <b>SS Train Start:</b> 09/30/2021 | <b>SS Train End:</b> 10/01/2021 | <b>DC Start:</b> 09/30/2021 | <b>DC End:</b> 06/18/2021 |
| <b>PreProduction Start:</b> 05/01/2021 | <b>Pretest Start:</b> 05/01/2021                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>Pretest End:</b> 08/01/2021         | <b>Recruitment Start:</b> 08/30/2021                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>Staffing Completed:</b> 09/07/2021  | <b>GIT Start:</b> 09/15/2021                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>SS Train Start:</b> 09/30/2021      | <b>SS Train End:</b> 10/01/2021                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>DC Start:</b> 09/30/2021            | <b>DC End:</b> 06/18/2021                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>Other Project Team Members:</b>     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>Other Project Names:</b>            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>Sample Mgmt Sys</b>                 | MSMS                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>Data Col Tool</b>                   | Blaise 4.8; Blaise 5                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>Hardware</b>                        | Laptop; Desktop; [UM cell] Phone                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>DE Software</b>                     | NA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>QC Recording Tool</b>               | DRI-CARI                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>Incentive</b>                       | Yes, R; Yes, INF                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>Administration</b>                  | SRO Group                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>Payment Type</b>                    | Check, post (75); Other (ePay)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |
| <b>Payment Method</b>                  | Check through other system (PSID RAPS); Other (ePay)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                    |                                   |                                        |                                  |                                |                                      |                                       |                              |                                   |                                 |                             |                           |

|                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                      |              |
|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|--------------|
| <b>Report Period</b>  | Feb, 2022 (PSID TAS 2021)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <b>Project Phase</b> | Implementing |
| <b>Risk Level</b>     | On Track                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                      |              |
| <b>Monthly Update</b> | <p>TAS continues to exceeded the cumulative goal through week 25 but the surplus of interviews (+83; 1861 vs. goal of 1778) has diminished due to lower than expected weekly yield on Release 4. Rel 4 is currently going through the self-admin sequence and is completing slower compared to Rels 1 - 3. In addition, Rel 4 was larger than expected and made available to SRO about a month later than in 2019 which will have impact on the total fieldwork duration. We are now projecting TAS 2021 to go through June 2022. Our current response rate is 69.7 with a proposal goal of</p> |                      |              |

88%.

Despite slow progress on Releases 1 - 3 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 have a few intermediate strategies in play. 1) 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. 2) we are getting ready to send small gift bags to non-final Rs. 3) we are coordinating with CDS to start visiting cases in person and 4) we are finishing our Meet the Team initiative which includes a Videoask video send via email / text to Rs.

In addition, Release 4 will go through the Web Special Offer between 3/31 and 4/15 which should improve completion rate from around 26% to, hopefully, mid or higher 40s.

The final sequence of interventions will be carried out later in May/ June 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.

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.

#### Special Issues

##### Cost

Mar 15, 2022

|                                                |                                                                                                                                                                                                               |  |
|------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| <b>Total Cost to Date (Direct + Indirect):</b> | 811,699.70                                                                                                                                                                                                    |  |
| <b>Estimated Cost at Completion (E\$AC):</b>   | 1,371,440.93                                                                                                                                                                                                  |  |
| <b>Total Budget:</b>                           | 1,299,454.85                                                                                                                                                                                                  |  |
| <b>Variance (Budget minus E\$AC):</b>          | -71,986.08                                                                                                                                                                                                    |  |
| <b>Reason For Variance:</b>                    | Overrun increased after adding cost for in-person visits and increasing iwer hours to account for more sample in Release 4. Cost overrun is still less than additions due to increases in iwer compensations. |  |

##### Projections

Mar 15, 2022

|                                           |                                             |  |
|-------------------------------------------|---------------------------------------------|--|
| <b>Dollars Projected For Month:</b>       | 129,881.26                                  |  |
| <b>Actual Dollars Used:</b>               | 130,826.17                                  |  |
| <b>Variance (Projected minus Actual):</b> | -944.91                                     |  |
| <b>Reason For Variance:</b>               | Lower iwer hours but slight overrun in TSG. |  |

#### Measures

|                              | Units Complete | RR   | HPI |
|------------------------------|----------------|------|-----|
| <b>Current Goal:</b>         | 1778           | 66.6 | n/a |
| <b>Goal at Completion:</b>   | 2344           | 88%  | n/a |
| <b>Current actual:</b>       | 1861           | 69.7 | n/a |
| <b>Estimate at Complete:</b> | 2344           | 88%  | n/a |
| <b>Variance:</b>             |                |      |     |

#### Other Measures

**Project Name** (PSID21) Panel Study of Income Dynamics 2021

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

**Project Type** Sponsored Projects **Project Status** Current

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

**Principal Investigator/Client** David Johnson (UM)  
Katherine McGonagle (UM)  
Narayan Sastry (UM)

**Funding Agency** NSF, NIA, NICHD, The Office of the Assistant Secretary for Planning and Evaluation of the United States, DHHS, The Econom

**IRB** **HUM#:** HUM00062417 **Period Of Approval:** 8/20/2020 - 8/19/202

**Project Team** **Project Lead:** Shonda R Kruger-Ndiaye  
**Budget Analyst:** Megan Gomez-Mesquita  
**Production Manager:** Stacy Quisenberry  
**Senior Project Advisor:** Stephanie A Chardoul  
**Production Manager:** Sarah Crane  
**Production Manager:** Rachel Anne Orlowski

**Proposal #:** no data

**Description:** PSID (known to Respondents as the Family Economics Study or FES) is a longitudinal survey of several thousand individuals and their families, carried out since 1968 and conducted every two years. The sample is comprised of respondents from the 4,800 original families as well as new (immigrant) sample added in 1997/1999 and 2017/2019. The total 2021 sample size will be approx. 11,200, with approx. 9,700 completed interviews expected. Most of the information collected is about family composition and changes (marriages, divorces, births, deaths, people moving in and out), income sources and amounts, employment and pensions and wealth. There are also questions about housing, education, vehicles, health, and money spent on food, healthcare, and school. The main focus is on how these family composition and financial factors interact with each other and how they change over time. The 2021 instrument also features questions related to the impact of COVID on the family.

PSID 2021 is the first full wave of PSID Core to be conducted with a Web, self-administered option and using Blaise 5 and MSMS and the work scope includes the re-write of the 68-ID website and the Splitoff program to be compatible with new technical systems.

TAS21 will follow PSID Core data collection, interviewing eligible PSID sample members on a flow basis following their Core interviews.

**\*\*Note:** The Budget listed in MPR is the original 2021 budget. It has not been approved by PIs, who are currently reviewing a rebudget.\*\*

**SRO Project Period** 04/2020 - 04/2022

**Data Col Period** 03/2001 - 10/2021

**Security Plan** NA

**Milestone Dates**

**PreProduction Start:** 04/01/2020

**Pretest End:** 10/25/2020

**Staffing Completed:** 12/02/2020

**SS Train Start:** 02/24/2021

**DC Start:** 03/18/2021

**Pretest Start:** 09/28/2020

**Recruitment Start:** 10/15/2020

**GIT Start:**

**SS Train End:** 03/05/2021

**DC End:** 12/31/2021

**Other Project**

**Team Members:**

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

**Report Period** Feb, 2022 (PSID21) **Project Phase** Implementing  
**Risk Level** On Track  
**Monthly Update** February work was limited to consolidation of debriefing feedback, response to questions from PSID about delivered data, and attempts to wrap up SRO work.

#### Special Issues

**Cost**  
**Feb 28, 2022**

|                                                |                                                                                                                                         |
|------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| <b>Total Cost to Date (Direct + Indirect):</b> | 7,269,043.10                                                                                                                            |
| <b>Estimated Cost at Completion (E\$AC):</b>   | 7,302,663.85                                                                                                                            |
| <b>Total Budget:</b>                           | 6,887,423.00                                                                                                                            |
| <b>Variance (Budget minus E\$AC):</b>          | -415,240.85                                                                                                                             |
| <b>Reason For Variance:</b>                    | Our overall projected variance increased slightly this month over last month due to higher than projected February actuals (see below). |

**Projections**  
**Feb 28, 2022**

|                                           |                                                                                                                                                                                                                                                                                                                              |
|-------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Dollars Projected For Month:</b>       | 62,991.52                                                                                                                                                                                                                                                                                                                    |
| <b>Actual Dollars Used:</b>               | 76,551.24                                                                                                                                                                                                                                                                                                                    |
| <b>Variance (Projected minus Actual):</b> | -13,559.72                                                                                                                                                                                                                                                                                                                   |
| <b>Reason For Variance:</b>               | In February, we projected to spend \$40K direct cost, but actually spent \$51K, for a monthly direct cost overrun of \$11K. This overrun was mainly due to fringe benefits--higher than projected ACA benefits charges. There were also higher interviewer hours that hit in February from some January timesheet revisions. |

Projection updates were minimal.

| Measures                     | Units Complete | RR    | HPI |
|------------------------------|----------------|-------|-----|
| <b>Current Goal:</b>         | 9025           | 84%   | 7.5 |
| <b>Goal at Completion:</b>   | 9025           | 84%   | 7.5 |
| <b>Current actual:</b>       | 9244           | 85.7% | 7.5 |
| <b>Estimate at Complete:</b> | 9244           | 85.7% | 7.5 |
| <b>Variance:</b>             | -219           | -1.7  | 0   |

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

|                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
|--------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|-----------------------------------|-----------------------------|-----------------------|---------------------|---------------------------|----------------------------|-------------------|------------------------|----------------------|------------------|----------------|
| <b>Project Name</b>                  | (SCA 2022) Surveys of Consumer Attitudes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Project Mode</b>                  | Primary: Telephone      Total of Modes: 1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Project Type</b>                  | Sponsored Projects                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <b>Project Status</b>        | Current                           |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Budget</b>                        | <b>Direct Budget:</b> 1,251,758.00                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <b>Indirect Budget:</b> 0.00 | <b>Total Budget:</b> 1,251,758.00 |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Principal Investigator/Client</b> | Richard Curtin (SCA)<br>Tuba Suzer-Gurtekin (SCA)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Funding Agency</b>                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>IRB</b>                           | <b>HUM#:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <b>Period Of Approval:</b>   |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Project Team</b>                  | <b>Project Lead:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Theresa Camelo               |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
|                                      | <b>Budget Analyst:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Dean E Stevens               |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
|                                      | <b>Production Manager:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Lisa J Cam                   |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
|                                      | <b>Senior Project Advisor:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Shonda R Kruger-Ndiaye       |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
|                                      | <b>Production Manager:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
|                                      | <b>Production Manager:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Proposal #:</b>                   | no data                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Description:</b>                  | <p>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.</p> <p>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.</p>                                                                      |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>SRO Project Period</b>            | 12/2021 - 12/2022                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Data Col Period</b>               | 01/2022 - 12/2022                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Security Plan</b>                 | NA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Milestone Dates</b>               | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center; padding: 5px;"><b>PreProduction Start:</b></td> <td style="text-align: center; padding: 5px;"><b>Pretest Start:</b></td> </tr> <tr> <td style="text-align: center; padding: 5px;"><b>Pretest End:</b></td> <td style="text-align: center; padding: 5px;"><b>Recruitment Start:</b></td> </tr> <tr> <td style="text-align: center; padding: 5px;"><b>Staffing Completed:</b></td> <td style="text-align: center; padding: 5px;"><b>GIT Start:</b></td> </tr> <tr> <td style="text-align: center; padding: 5px;"><b>SS Train Start:</b></td> <td style="text-align: center; padding: 5px;"><b>SS Train End:</b></td> </tr> <tr> <td style="text-align: center; padding: 5px;"><b>DC Start:</b></td> <td style="text-align: center; padding: 5px;"><b>DC End:</b></td> </tr> </table> |                              |                                   | <b>PreProduction Start:</b> | <b>Pretest Start:</b> | <b>Pretest End:</b> | <b>Recruitment Start:</b> | <b>Staffing Completed:</b> | <b>GIT Start:</b> | <b>SS Train Start:</b> | <b>SS Train End:</b> | <b>DC Start:</b> | <b>DC End:</b> |
| <b>PreProduction Start:</b>          | <b>Pretest Start:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Pretest End:</b>                  | <b>Recruitment Start:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Staffing Completed:</b>           | <b>GIT Start:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>SS Train Start:</b>               | <b>SS Train End:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>DC Start:</b>                     | <b>DC End:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Other Project Team Members:</b>   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Other Project Names:</b>          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Sample Mgmt Sys</b>               | NA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Data Col Tool</b>                 | Blaise 4.8                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Hardware</b>                      | Laptop; Desktop; [UM cell] Phone                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>DE Software</b>                   | NA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>QC Recording Tool</b>             | DRI-CXM                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Incentive</b>                     | Not used                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Administration</b>                | N/A                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Payment Type</b>                  | N/A                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Payment Method</b>                | N/A                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                              |                                   |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |

|                       |                                                                                                                                                                                                                                                                  |                      |              |
|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|--------------|
| <b>Report Period</b>  | Feb, 2022 (SCA 2022)                                                                                                                                                                                                                                             | <b>Project Phase</b> | Implementing |
| <b>Risk Level</b>     | On Track                                                                                                                                                                                                                                                         |                      |              |
| <b>Monthly Update</b> | SCA FEB22 began as scheduled on WED 2/1/26/202, and ended as scheduled on MON FEB 21. We completed 600 (320/180/100) IWs for the month (meeting the monthly goals of 600: 320/180/100 goal) - at a cumulative HPI of 3.01 (0.01 above the budgeted goal of 3.0). |                      |              |

**Special Issues****Cost**

Mar 15, 2022

*Total Cost to Date (Direct + Indirect):* 192,990.15  
*Estimated Cost at Completion (E\$AC):* 1,231,458.55  
*Total Budget:* 1,251,758.00  
*Variance (Budget minus E\$AC):* 20,299.45  
*Reason For Variance:* Reduced HPI in JAN

**Projections**

Mar 15, 2022

*Dollars Projected For Month:* 91,957.29  
*Actual Dollars Used:* 103,157.21  
*Variance (Projected minus Actual):* -11,199.92  
*Reason For Variance:* Attrition

**Measures**

|                              | Units Complete | RR | HPI  |
|------------------------------|----------------|----|------|
| <i>Current Goal:</i>         | 600            |    | 3.0  |
| <i>Goal at Completion:</i>   | 600            |    | 3.0  |
| <i>Current actual:</i>       | 600            |    | 3.01 |
| <i>Estimate at Complete:</i> | 600            |    | 3.01 |
| <i>Variance:</i>             | 0              |    | .01  |

**Other Measures**



|                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|---------------------|---------------|--------------------------|----------------------|------------|----------------|--|--------------|--|--------------------|--|---------------------|--|------------|--|-----------------|--|---------------|--|-----------|------------|---------|------------|
| Project Name                  | (SCIP 2021) Sustainability Culture Indicators Project                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| Project Mode                  | Primary: Not Available                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| Project Type                  | Sponsored Projects                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                      | Project Status      | Current       |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| Budget                        | Direct Budget:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | 126,000.00           | Indirect Budget:    | 0.01          | Total Budget: 126,000.00 |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| Principal Investigator/Client | John Callewaert, PI (SRC, Graham Sustainability Institute)<br>Robert Marans, Co-PI (SRC)<br>Noah Webster, Co-PI (SRC)                                                                                                                                                                                                                                                                                                                                                                                                                            |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| Funding Agency                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| IRB                           | HUM#:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | HUM00204955          | Period Of Approval: | 9/2021-9/2026 |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| Project Team                  | Project Lead:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Maureen Joan O'Brien |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
|                               | Budget Analyst:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Carl S Remmert       |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
|                               | Production Manager:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
|                               | Senior Project Advisor:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Andrew L Hupp        |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
|                               | Production Manager:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| Proposal #:                   | no data                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| Description:                  | The overall goal Sustainability Cultural Indicators Project (SCIP), a joint project of the Institute for Social Research (ISR) and the Graham Environmental Sustainability Institute (Graham), is to measure changes in sustainability and carbon-neutrality related knowledge, commitments, and practices in the University of Michigan (U-M) community over time. The principle component of SCIP is a large-scale annual survey, to be conducted with U-M students, faculty, and staff from all U-M Campuses: Ann Arbor, Flint, and Dearborn. |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| SRO Project Period            | 09/2021 - 09/2026                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| Data Col Period               | 10/2021 - 12/2021                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| Security Plan                 | NA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| Milestone Dates               | <table><tr><td>PreProduction Start:</td><td>08/15/2021</td><td>Pretest Start:</td><td></td></tr><tr><td>Pretest End:</td><td></td><td>Recruitment Start:</td><td></td></tr><tr><td>Staffing Completed:</td><td></td><td>GIT Start:</td><td></td></tr><tr><td>SS Train Start:</td><td></td><td>SS Train End:</td><td></td></tr><tr><td>DC Start:</td><td>10/13/2021</td><td>DC End:</td><td>12/15/2021</td></tr></table>                                                                                                                          |                      |                     |               |                          | PreProduction Start: | 08/15/2021 | Pretest Start: |  | Pretest End: |  | Recruitment Start: |  | Staffing Completed: |  | GIT Start: |  | SS Train Start: |  | SS Train End: |  | DC Start: | 10/13/2021 | DC End: | 12/15/2021 |
| PreProduction Start:          | 08/15/2021                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Pretest Start:       |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| Pretest End:                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Recruitment Start:   |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| Staffing Completed:           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | GIT Start:           |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| SS Train Start:               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | SS Train End:        |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| DC Start:                     | 10/13/2021                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | DC End:              | 12/15/2021          |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| Other Project Team Members:   | Maureen O'Brien - Project Lead, application programming, sample loading, questionnaire distribution<br>Minako Edgar - Sample prep, data management, data delivery, GIS analysis<br>Raphael Nishimura - Weighting<br>Carl Remmert - budget support analyses                                                                                                                                                                                                                                                                                       |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| Other Project Names:          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| Sample Mgmt Sys               | Project specific system (Qualtrics)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| Data Col Tool                 | Other (Qualtrics)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| Hardware                      | NA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| DE Software                   | N/A                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| QC Recording Tool             | N/A                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| Incentive                     | Yes, R                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| Administration                | NA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| Payment Type                  | Other (Amazon)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |
| Payment Method                | Other (via Email)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                      |                     |               |                          |                      |            |                |  |              |  |                    |  |                     |  |            |  |                 |  |               |  |           |            |         |            |

|                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                      |         |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|---------|
| <b>Report Period</b>  | Feb, 2022 (SCIP 2021)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <b>Project Phase</b> | Closing |
| <b>Risk Level</b>     | On Track                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                      |         |
| <b>Monthly Update</b> | Current activity on this project involves writing the final methodology report. We have received all data necessary for weighting from all three campuses, Ann Arbor, Dearborn, and Flint. Weighting is underway and most weighted files have been delivered. Data collection ended 12/1/2021. The final overall RR was 27.0%. The Ann Arbor RR was 26.0%, Dearborn was 27.2%, and Flint had a 33.7% RR. Some Ann Arbor subgroups had higher goals than 27% (and some lower) based on RR's from last wave. The Ann Arbor subgroup that did not meet goal was faculty (27.7RR). Dearborn Freshmen (26.3%), Juniors (26.6%), and Seniors (21.1%), did not meet a 27%RR. All other |                      |         |

subgroups met goal or a 27%RR. The \$5 incentives added for underperforming subgroups were effective in increasing RR's. SRO has returned ~50k of unused funds to the PI's at their request. All \$5 incentives \$100 incentives were distributed.

### Special Issues

#### Cost

|                                                |                                                                                                                    |
|------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|
| <b>Total Cost to Date (Direct + Indirect):</b> | 60,662.69                                                                                                          |
| <b>Estimated Cost at Completion (E\$AC):</b>   | 77,334.49                                                                                                          |
| <b>Total Budget:</b>                           | 126,000.00                                                                                                         |
| <b>Variance (Budget minus E\$AC):</b>          | 48,665.51                                                                                                          |
| <b>Reason For Variance:</b>                    | 52k has been transferred back to the PI's due to overfunding, but this does not currently show on the cost report. |

#### Projections

|                                           |                                 |
|-------------------------------------------|---------------------------------|
| <b>Dollars Projected For Month:</b>       | 10,731.11                       |
| <b>Actual Dollars Used:</b>               | 6,732.91                        |
| <b>Variance (Projected minus Actual):</b> | 3,998.20                        |
| <b>Reason For Variance:</b>               | Staff did not charge all hours. |

#### Measures

|                              | Units Complete | RR  | HPI |
|------------------------------|----------------|-----|-----|
| <b>Current Goal:</b>         | 6,860          | 27% |     |
| <b>Goal at Completion:</b>   | 6,860          |     |     |
| <b>Current actual:</b>       | 6,856          | 27% |     |
| <b>Estimate at Complete:</b> | 6,860          |     |     |
| <b>Variance:</b>             |                |     |     |

#### 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)<br>Kristine Ajrouch (ISR)<br>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               | <table><tr><td>PreProduction Start:</td><td>09/01/2022</td><td>Pretest Start:</td><td></td></tr><tr><td>Pretest End:</td><td></td><td>Recruitment Start:</td><td>01/15/2022</td></tr><tr><td>Staffing Completed:</td><td></td><td>GIT Start:</td><td></td></tr><tr><td>SS Train Start:</td><td></td><td>SS Train End:</td><td></td></tr><tr><td>DC Start:</td><td></td><td>DC End:</td><td>03/31/2023</td></tr></table>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                    |                        |              |                            | PreProduction Start: | 09/01/2022 | Pretest Start: |  | Pretest End: |  | Recruitment Start: | 01/15/2022 | Staffing Completed: |  | GIT Start: |  | SS Train Start: |  | SS Train End: |  | DC Start: |  | DC End: | 03/31/2023 |
| PreProduction Start:          | 09/01/2022                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Pretest Start:     |                        |              |                            |                      |            |                |  |              |  |                    |            |                     |  |            |  |                 |  |               |  |           |  |         |            |
| Pretest End:                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Recruitment Start: | 01/15/2022             |              |                            |                      |            |                |  |              |  |                    |            |                     |  |            |  |                 |  |               |  |           |  |         |            |
| Staffing Completed:           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | GIT Start:         |                        |              |                            |                      |            |                |  |              |  |                    |            |                     |  |            |  |                 |  |               |  |           |  |         |            |
| SS Train Start:               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | SS Train End:      |                        |              |                            |                      |            |                |  |              |  |                    |            |                     |  |            |  |                 |  |               |  |           |  |         |            |
| DC Start:                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | DC End:            | 03/31/2023             |              |                            |                      |            |                |  |              |  |                    |            |                     |  |            |  |                 |  |               |  |           |  |         |            |
| Other Project Team Members:   | Ian Ogden, Lisa Van Havermaet, Steven Sonoras, Veronica Connors-Burge, Taghreed Lovell, Jeff Smith (Tech Lead), others TBD                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                    |                        |              |                            |                      |            |                |  |              |  |                    |            |                     |  |            |  |                 |  |               |  |           |  |         |            |
| Other Project Names:          | Social Relations 2022, DAWN                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                    |                        |              |                            |                      |            |                |  |              |  |                    |            |                     |  |            |  |                 |  |               |  |           |  |         |            |
| Sample Mgmt Sys               | SurveyTrak                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                    |                        |              |                            |                      |            |                |  |              |  |                    |            |                     |  |            |  |                 |  |               |  |           |  |         |            |
| Data Col Tool                 | Blaise 4.8                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                    |                        |              |                            |                      |            |                |  |              |  |                    |            |                     |  |            |  |                 |  |               |  |           |  |         |            |
| Hardware                      | Laptop; [UM cell] Phone; Paper and Pencil                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                    |                        |              |                            |                      |            |                |  |              |  |                    |            |                     |  |            |  |                 |  |               |  |           |  |         |            |
| DE Software                   | Other (Weblog)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                    |                        |              |                            |                      |            |                |  |              |  |                    |            |                     |  |            |  |                 |  |               |  |           |  |         |            |
| QC Recording Tool             | DRI-CARI                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                    |                        |              |                            |                      |            |                |  |              |  |                    |            |                     |  |            |  |                 |  |               |  |           |  |         |            |
| Incentive                     | Yes, R                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                    |                        |              |                            |                      |            |                |  |              |  |                    |            |                     |  |            |  |                 |  |               |  |           |  |         |            |
| Administration                | SRO Group                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                    |                        |              |                            |                      |            |                |  |              |  |                    |            |                     |  |            |  |                 |  |               |  |           |  |         |            |
| Payment Type                  | Cash, prepaid (\$70)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                    |                        |              |                            |                      |            |                |  |              |  |                    |            |                     |  |            |  |                 |  |               |  |           |  |         |            |
| Payment Method                | Interviewer payment of cash (reimbursed/reconciled via Tenrox)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                    |                        |              |                            |                      |            |                |  |              |  |                    |            |                     |  |            |  |                 |  |               |  |           |  |         |            |

|                      |                      |                      |          |
|----------------------|----------------------|----------------------|----------|
| <b>Report Period</b> | Feb, 2022 (SRS 2022) | <b>Project Phase</b> | Planning |
|----------------------|----------------------|----------------------|----------|

|                   |               |
|-------------------|---------------|
| <b>Risk Level</b> | Some Concerns |
|-------------------|---------------|

|                       |                                                                                                                                                                                                                                                                                                                                                   |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Monthly Update</b> | <p>During February 2022, SRC activities on the DAWN projects included the following:</p> <p>Task 1: Management, Budget and Work Plan</p> <ul style="list-style-type: none"> <li>Held biweekly meetings with the DAWN research team to discuss study design and finances.</li> <li>Prepared cost reports and reviewed monthly expenses.</li> </ul> |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

- Reviewed preliminary budgets from the SRO proposal group for D-Amp and SRS
- o Prepared explanatory documentation of line-item budget changes
- o Reviewed specifications with the research team and noted adjustments for revisions
- Reviewed and elaborated capacity-to-consent specifications with the research team
- 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
- Placed order for dynamometers (grip strength) for SRS. (Dynamometers were purchased for D-Amp in 2020).

#### Task 2: Sampling

- Attended meetings, responded to questions regarding design of screener

#### Task 3: Questionnaire Development

- Began work on screening specification to merge D-Amp and SRS screening.
- Reviewed 2020 questionnaire for insertion of necessary skips for language and skips that might be needed in order to adapt the questionnaire for the SRS study.

#### Task 4: CAI Programming

- No activity this month

#### Task 5: Systems Programming

- No activity this month

#### 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:

- Financial – both the D-Amp study and the SRS study will need significant funding in order to implement the studies as desired. The studies are being rebudgeted in order to provide a more accurate view of funds needed to complete the studies as currently designed. Particular areas of concern are:
  - o Increases in interviewer/team leader pay rates on both projects
  - o Increases in training costs are higher on both projects due to a longer than projected training, and the need for more new hires than anticipated (a pandemic-related outcome), and inflationary pressure
  - o Inadequate allocations for project management on both projects
  - o On D-Amp, insufficient cost-to-complete projections for critical project infrastructure
  - o Expiration of the D-Amp saliva kits purchased in 2020
- Schedule – the studies are behind schedule for a Spring/early Summer 2022 launch, due to pending decisions on sample and study design.
  - o A draft schedule prepared for a June/July 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.
- The 2019 SRS funded budget did not include a budget for informant interviews. Some adjustments to the technical systems will be required if informant interviews will not be included in the SRS design.

Cost  
Mar 07, 2022

|                                                |              |
|------------------------------------------------|--------------|
| <b>Total Cost to Date (Direct + Indirect):</b> | 46,293.49    |
| <b>Estimated Cost at Completion (E\$AC):</b>   | 4,680,474.12 |
| <b>Total Budget:</b>                           | 4,495,802.00 |
| <b>Variance (Budget minus E\$AC):</b>          | -184,672.12  |

**Reason For Variance:**

Increases in interviewer pay rates, more new hires, and the need for a much longer study specific training than budgeted are leading to an expected overrun. The project will need significant funding in order to conduct the work scope as planned.

**Projections  
Mar 07, 2022**

**Dollars Projected For Month:**

6,250.59

**Actual Dollars Used:**

-13,093.98

**Variance (Projected minus Actual):**

19,344.57

**Reason For Variance:**

The survey director's hours were moved to overhead. Activity on the project did not start as planned due to issues related to work scope and funding issues.

**Measures**

|                                                                                                                                  | Units Complete | RR | HPI |
|----------------------------------------------------------------------------------------------------------------------------------|----------------|----|-----|
| <b>Current Goal:</b><br><b>Goal at Completion:</b><br><b>Current actual:</b><br><b>Estimate at Complete:</b><br><b>Variance:</b> |                |    |     |

**Other Measures**

|                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                              |                                |                                                                                                                                           |                                                                                                                   |
|-------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| <b>Project Name</b>                                                                                                                       | (SSRC Web Survey) Social Science Research Council Web Survey                                                                                                                                                                                                                                                                                                                                                                                    |                              |                                |                                                                                                                                           |                                                                                                                   |
| <b>Project Mode</b>                                                                                                                       | Primary: Web    Total of Modes: 1                                                                                                                                                                                                                                                                                                                                                                                                               |                              |                                |                                                                                                                                           |                                                                                                                   |
| <b>Project Type</b>                                                                                                                       | Sponsored Projects                                                                                                                                                                                                                                                                                                                                                                                                                              | <b>Project Status</b>        | Current                        |                                                                                                                                           |                                                                                                                   |
| <b>Budget</b>                                                                                                                             | <b>Direct Budget:</b> 11,640.00                                                                                                                                                                                                                                                                                                                                                                                                                 | <b>Indirect Budget:</b> 0.00 | <b>Total Budget:</b> 11,640.00 |                                                                                                                                           |                                                                                                                   |
| <b>Principal Investigator/Client</b>                                                                                                      | Anna Harvey (SSRC)<br>Stephanie Chardoul (SRO)                                                                                                                                                                                                                                                                                                                                                                                                  |                              |                                |                                                                                                                                           |                                                                                                                   |
| <b>Funding Agency</b>                                                                                                                     | SSRC                                                                                                                                                                                                                                                                                                                                                                                                                                            |                              |                                |                                                                                                                                           |                                                                                                                   |
| <b>IRB</b>                                                                                                                                | <b>HUM#:</b> HUM00214009                                                                                                                                                                                                                                                                                                                                                                                                                        | <b>Period Of Approval:</b>   | 3/1/2022-3/1/2023              |                                                                                                                                           |                                                                                                                   |
| <b>Project Team</b>                                                                                                                       | <b>Project Lead:</b> Karin Schneider<br><b>Budget Analyst:</b> Carl S Remmert<br><b>Production Manager:</b><br><b>Senior Project Advisor:</b><br><b>Production Manager:</b><br><b>Production Manager:</b>                                                                                                                                                                                                                                       |                              |                                |                                                                                                                                           |                                                                                                                   |
| <b>Proposal #:</b>                                                                                                                        | no data                                                                                                                                                                                                                                                                                                                                                                                                                                         |                              |                                |                                                                                                                                           |                                                                                                                   |
| <b>Description:</b>                                                                                                                       | The project is designed to assess the experiences, concerns, and needs of SSRC professional and administrative staff in the pandemic era and explore responses to potential workplace changes in a manner so that staff is assured of the confidentiality of their responses. SRO will email an invitation to the web survey to the SSRC staff. SSRC provides staff email list. SRO will summarize findings.                                    |                              |                                |                                                                                                                                           |                                                                                                                   |
| <b>SRO Project Period</b>                                                                                                                 | 03/2022 - 06/2022                                                                                                                                                                                                                                                                                                                                                                                                                               |                              |                                |                                                                                                                                           |                                                                                                                   |
| <b>Data Col Period</b>                                                                                                                    | 04/2022 - 04/2022                                                                                                                                                                                                                                                                                                                                                                                                                               |                              |                                |                                                                                                                                           |                                                                                                                   |
| <b>Security Plan</b>                                                                                                                      | NA                                                                                                                                                                                                                                                                                                                                                                                                                                              |                              |                                |                                                                                                                                           |                                                                                                                   |
| <b>Milestone Dates</b>                                                                                                                    | <table border="1" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> <b>PreProduction Start:</b> 03/21/2022<br/> <b>Pretest End:</b><br/> <b>Staffing Completed:</b><br/> <b>SS Train Start:</b><br/> <b>DC Start:</b> </td> <td style="width: 50%; vertical-align: top;"> <b>Pretest Start:</b><br/> <b>Recruitment Start:</b><br/> <b>GIT Start:</b><br/> <b>SS Train End:</b><br/> <b>DC End:</b> </td> </tr> </table> |                              |                                | <b>PreProduction Start:</b> 03/21/2022<br><b>Pretest End:</b><br><b>Staffing Completed:</b><br><b>SS Train Start:</b><br><b>DC Start:</b> | <b>Pretest Start:</b><br><b>Recruitment Start:</b><br><b>GIT Start:</b><br><b>SS Train End:</b><br><b>DC End:</b> |
| <b>PreProduction Start:</b> 03/21/2022<br><b>Pretest End:</b><br><b>Staffing Completed:</b><br><b>SS Train Start:</b><br><b>DC Start:</b> | <b>Pretest Start:</b><br><b>Recruitment Start:</b><br><b>GIT Start:</b><br><b>SS Train End:</b><br><b>DC End:</b>                                                                                                                                                                                                                                                                                                                               |                              |                                |                                                                                                                                           |                                                                                                                   |
| <b>Other Project Team Members:</b>                                                                                                        | Grad student Mark Nathin is assisting on project.                                                                                                                                                                                                                                                                                                                                                                                               |                              |                                |                                                                                                                                           |                                                                                                                   |
| <b>Other Project Names:</b>                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                              |                                |                                                                                                                                           |                                                                                                                   |
| <b>Sample Mgmt Sys</b>                                                                                                                    | Other (Qualtrics)                                                                                                                                                                                                                                                                                                                                                                                                                               |                              |                                |                                                                                                                                           |                                                                                                                   |
| <b>Data Col Tool</b>                                                                                                                      | Other (Qualtrics)                                                                                                                                                                                                                                                                                                                                                                                                                               |                              |                                |                                                                                                                                           |                                                                                                                   |
| <b>Hardware</b>                                                                                                                           | NA                                                                                                                                                                                                                                                                                                                                                                                                                                              |                              |                                |                                                                                                                                           |                                                                                                                   |
| <b>DE Software</b>                                                                                                                        | NA                                                                                                                                                                                                                                                                                                                                                                                                                                              |                              |                                |                                                                                                                                           |                                                                                                                   |
| <b>QC Recording Tool</b>                                                                                                                  | NA                                                                                                                                                                                                                                                                                                                                                                                                                                              |                              |                                |                                                                                                                                           |                                                                                                                   |
| <b>Incentive</b>                                                                                                                          | Not used                                                                                                                                                                                                                                                                                                                                                                                                                                        |                              |                                |                                                                                                                                           |                                                                                                                   |
| <b>Administration</b>                                                                                                                     | SRO Group                                                                                                                                                                                                                                                                                                                                                                                                                                       |                              |                                |                                                                                                                                           |                                                                                                                   |
| <b>Payment Type</b>                                                                                                                       | NA                                                                                                                                                                                                                                                                                                                                                                                                                                              |                              |                                |                                                                                                                                           |                                                                                                                   |
| <b>Payment Method</b>                                                                                                                     | NA                                                                                                                                                                                                                                                                                                                                                                                                                                              |                              |                                |                                                                                                                                           |                                                                                                                   |

|                       |                                                                                                                     |                      |            |
|-----------------------|---------------------------------------------------------------------------------------------------------------------|----------------------|------------|
| <b>Report Period</b>  | Feb, 2022 (SSRC Web Survey)                                                                                         | <b>Project Phase</b> | Initiation |
| <b>Risk Level</b>     | On Track                                                                                                            |                      |            |
| <b>Monthly Update</b> | We have staff list, IRB exemption, and SSRC has signed off on questionnaire. Mark Nathin will program in Qualtrics. |                      |            |
| <b>Special Issues</b> | None                                                                                                                |                      |            |
| <b>Cost</b>           |                                                                                                                     |                      |            |
| <b>Mar 18, 2022</b>   | <b>Total Cost to Date (Direct + Indirect):</b>                                                                      | 0.00                 |            |
|                       | <b>Estimated Cost at Completion (E\$AC):</b>                                                                        | 11,640.00            |            |
|                       | <b>Total Budget:</b>                                                                                                | 11,640.00            |            |
|                       | <b>Variance (Budget minus E\$AC):</b>                                                                               | 0.00                 |            |
|                       | <b>Reason For Variance:</b>                                                                                         |                      |            |

Projections  
Mar 18, 2022

Dollars Projected For Month: 0.00  
Actual Dollars Used: 0.00  
Variance (Projected minus Actual): 0.00  
Reason For Variance: Costs will start in March

Measures

|                       |    | Units Complete | RR | HPI |
|-----------------------|----|----------------|----|-----|
| Current Goal:         | 60 |                | 80 |     |
| Goal at Completion:   | 60 |                | 80 |     |
| Current actual:       | 0  |                | 0  |     |
| Estimate at Complete: | 60 |                | 0  |     |
| Variance:             |    |                |    |     |

Other Measures

|                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                          |                            |                                                 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
|----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|----------------------------|-------------------------------------------------|----------------------------------------|-----------------------|---------------------|--------------------------------------|---------------------------------------|-------------------|-----------------------------------|---------------------------------|-----------------------------|---------------------------|
| <b>Project Name</b>                    | (STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                          |                            |                                                 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
| <b>Project Mode</b>                    | Primary: Web    Secondary: Telephone    Total of Modes: 2                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                          |                            |                                                 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
| <b>Project Type</b>                    | Sponsored Projects                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                          | <b>Project Status</b>      | Current                                         |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
| <b>Budget</b>                          | <b>Direct Budget:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 8,196,521.00             | <b>Indirect Budget:</b>    | 4,590,892.00 <b>Total Budget:</b> 12,809,390.00 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
| <b>Principal Investigator/Client</b>   | James Wagner (University of Michigan)<br>Robert Ursano (Uniformed Services University of the Health Scienc)<br>Murray Stein (University of California San Diego)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                          |                            |                                                 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
| <b>Funding Agency</b>                  | Department of Defense                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                          |                            |                                                 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
| <b>IRB</b>                             | <b>HUM#:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | HUM00180765              | <b>Period Of Approval:</b> | 6/3/2020 - 6/2/2021                             |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
| <b>Project Team</b>                    | <b>Project Lead:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Meredith A House         |                            |                                                 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
|                                        | <b>Budget Analyst:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | William Lokers           |                            |                                                 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
|                                        | <b>Production Manager:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Ruth B Philippou         |                            |                                                 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
|                                        | <b>Senior Project Advisor:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Lisa S Holland           |                            |                                                 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
|                                        | <b>Production Manager:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Juan Carlos Donoso       |                            |                                                 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
|                                        | <b>Production Manager:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Lisa M Lewandowski-Romps |                            |                                                 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
| <b>Proposal #:</b>                     | no data                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                          |                            |                                                 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
| <b>Description:</b>                    | <p>This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.</p> <p>For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data.</p> <p>To date, we have completed 2 waves of STARRS-LS interviewing. During Wave 1, we attempted to contact 50,000 individuals and completed approximately 14,500 full interviews. All Wave 1 participants that completed a full Wave 1 interview were asked to participate in Wave 2. Waves 3 and 4, which are covered in this application, will include the full STARRS-LS Wave 2 sample, regardless of whether they completed the interview.</p> <p>In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys).</p> |                          |                            |                                                 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
| <b>SRO Project Period</b>              | 05/2020 - 04/2025                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                          |                            |                                                 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
| <b>Data Col Period</b>                 | 11/2020 - 10/2024                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                          |                            |                                                 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
| <b>Security Plan</b>                   | Yes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                          |                            |                                                 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
| <b>Milestone Dates</b>                 | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"><b>PreProduction Start:</b> 04/01/2020</td> <td style="padding: 5px;"><b>Pretest Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>Pretest End:</b></td> <td style="padding: 5px;"><b>Recruitment Start:</b> 07/23/2020</td> </tr> <tr> <td style="padding: 5px;"><b>Staffing Completed:</b> 10/01/2020</td> <td style="padding: 5px;"><b>GIT Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>SS Train Start:</b> 11/18/2020</td> <td style="padding: 5px;"><b>SS Train End:</b> 11/24/2020</td> </tr> <tr> <td style="padding: 5px;"><b>DC Start:</b> 11/09/2020</td> <td style="padding: 5px;"><b>DC End:</b> 11/03/2022</td> </tr> </table>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                          |                            |                                                 | <b>PreProduction Start:</b> 04/01/2020 | <b>Pretest Start:</b> | <b>Pretest End:</b> | <b>Recruitment Start:</b> 07/23/2020 | <b>Staffing Completed:</b> 10/01/2020 | <b>GIT Start:</b> | <b>SS Train Start:</b> 11/18/2020 | <b>SS Train End:</b> 11/24/2020 | <b>DC Start:</b> 11/09/2020 | <b>DC End:</b> 11/03/2022 |
| <b>PreProduction Start:</b> 04/01/2020 | <b>Pretest Start:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                          |                            |                                                 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
| <b>Pretest End:</b>                    | <b>Recruitment Start:</b> 07/23/2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                          |                            |                                                 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
| <b>Staffing Completed:</b> 10/01/2020  | <b>GIT Start:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                          |                            |                                                 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
| <b>SS Train Start:</b> 11/18/2020      | <b>SS Train End:</b> 11/24/2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                          |                            |                                                 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
| <b>DC Start:</b> 11/09/2020            | <b>DC End:</b> 11/03/2022                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                          |                            |                                                 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |
| <b>Other Project Team Members:</b>     | 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                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                          |                            |                                                 |                                        |                       |                     |                                      |                                       |                   |                                   |                                 |                             |                           |



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

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|                      |                                   |                      |              |
|----------------------|-----------------------------------|----------------------|--------------|
| <b>Report Period</b> | Feb, 2022 (STARRS-LS Waves 3 & 4) | <b>Project Phase</b> | Implementing |
|----------------------|-----------------------------------|----------------------|--------------|

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

|                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
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| <b>Monthly Update</b> | <ul style="list-style-type: none"> <li><input type="checkbox"/> We have released ten replicates (10,686 sample lines) and completed 7,933 interviews as of February 28.</li> <li><input type="checkbox"/> We continued to monitor the performance of replicates after the issue of STARRS emails being flagged and ending up in respondents' spam folders. We were pleased that Replicate 9 recovered fully and Replicate 10 tracked with the average response rate throughout the month.</li> <li><input type="checkbox"/> We launched the SHOS-A recruitment effort with interviewer training, letter and email communications sent to SHOS-A cases, and recruitment calling beginning mid-month.</li> <li><input type="checkbox"/> Two instrument changes were released this month: one for implementation of the Privacy Notice and the other to correct an error in a checkpoint for the alcohol section.</li> <li><input type="checkbox"/> We continued bi-weekly meetings with M&amp;RA to coordinate Safety Plan and respondent locating activities. We reviewed and edited slides for the March meeting with the Chaplains.</li> <li><input type="checkbox"/> We reviewed, provided feedback to the research team, and took actions related to the three formal memos the GSC sent to the research team. <ul style="list-style-type: none"> <li><input type="checkbox"/> We provided a ballpark estimate for adding 25 questions/6 minutes of content to the Wave 4 survey.</li> <li><input type="checkbox"/> We provided feedback to the PIs on the additional scope requested by the GSC related to adding the biospecimen flags at ICPSR.</li> </ul> </li> <li><input type="checkbox"/> We worked with the ICPSR curation unit to obtain their disclosure risk review documentation and forwarded it to USUHS.</li> <li><input type="checkbox"/> We provided updates for U-M's costs in the "SOW" for the GSC.</li> <li><input type="checkbox"/> IRB: <ul style="list-style-type: none"> <li><input type="checkbox"/> Administrative amendments for all STARRS protocols were completed and approved by both organizations.</li> <li><input type="checkbox"/> An amendment for the ODUSA realignment with OASA (M&amp;RA) was approved by U-M and sent to USUHS for secondary review.</li> </ul> </li> <li><input type="checkbox"/> The Enclave team completed or made good progress on a number of housekeeping tasks to keep Enclave data and documentation accurate and up-to-date.</li> <li><input type="checkbox"/> We received completed Annual Security Training Renewals and provided support to the users/analysts completing them.</li> <li><input type="checkbox"/> U-M worked to produce artifacts required by AAG for the Annual Security Controls Review.</li> <li><input type="checkbox"/> The yearly update to the SSN-Linkage ID list was completed and the file was transferred successfully to AAG.</li> <li><input type="checkbox"/> U-M created the cost estimate for repeat request for NDI data from the CDC.</li> <li><input type="checkbox"/> Two biomarker group requests were completed this month.</li> </ul> |
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**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 (see Table 4). 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 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  
Jan 31, 2022**

|                                                |                                                                                                                                                                                                                            |
|------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Total Cost to Date (Direct + Indirect):</b> | 4,117,337.95                                                                                                                                                                                                               |
| <b>Estimated Cost at Completion (E\$AC):</b>   | 13,166,408.07                                                                                                                                                                                                              |
| <b>Total Budget:</b>                           | 12,809,390.00                                                                                                                                                                                                              |
| <b>Variance (Budget minus E\$AC):</b>          | -357,018.07                                                                                                                                                                                                                |
| <b>Reason For Variance:</b>                    | The only adjustment this month was to push some unspent respondent token of appreciation dollars forward. After making updates to the projections, the overall overrun increased to \$357,018 from last month's \$324,894. |

**Projections  
Jan 31, 2022**

|                                           |            |
|-------------------------------------------|------------|
| <b>Dollars Projected For Month:</b>       | 229,834.58 |
| <b>Actual Dollars Used:</b>               | 229,165.28 |
| <b>Variance (Projected minus Actual):</b> | 669.30     |
| <b>Reason For Variance:</b>               | N/A        |

**Measures**

|                              | Units Complete | RR   | HPI  |
|------------------------------|----------------|------|------|
| <b>Current Goal:</b>         |                | 83.8 | 8.9  |
| <b>Goal at Completion:</b>   |                | 83   | 8    |
| <b>Current actual:</b>       |                | 78.1 | 10.5 |
| <b>Estimate at Complete:</b> |                | 78   | 10   |
| <b>Variance:</b>             |                | 5    | -2   |

**Other Measures**

|                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                      |                     |            |                          |
|-------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|---------------------|------------|--------------------------|
| Project Name                  | (VCT) Video Communication Technologies in Survey Data Collection                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                      |                     |            |                          |
| Project Mode                  | Primary: Mixed                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                      | Total of Modes: 3   |            |                          |
| Project Type                  | Sponsored Projects                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                      | Project Status      | Current    |                          |
| Budget                        | Direct Budget:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | 241,958.00           | Indirect Budget:    | 135,497.00 | Total Budget: 377,455.00 |
| Principal Investigator/Client | Dr. Frederick G. Conrad (University of Michigan)<br>Dr. Michael F. Schober (The New School)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                      |                     |            |                          |
| Funding Agency                | National Science Foundation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                      |                     |            |                          |
| IRB                           | HUM#:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | HUM00159711          | Period Of Approval: | Exempt     |                          |
| Project Team                  | Project Lead:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Andrew L Hupp        |                     |            |                          |
|                               | Budget Analyst:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Dean E Stevens       |                     |            |                          |
|                               | Production Manager:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Pooja Varma-Laughlin |                     |            |                          |
|                               | Senior Project Advisor:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Nicole G Kirgis      |                     |            |                          |
|                               | Production Manager:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                      |                     |            |                          |
| Proposal #:                   | no data                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                      |                     |            |                          |
| Description:                  | <p>This research project will examine data quality, participation, respondent experience, and costs in two promising but not yet widely deployed survey modes that use off-the-shelf video technology and are less costly than face to face (FTF) interviews: video-mediated (VM) interviews (live two-way communication via platforms like Skype) and video self-administered (VS) interviews, in which video-recorded interviewers ask the questions and respondents answer by typing or clicking. This project will compare these measures of data quality and costs in VM and VS interviews carried out by the same professional interviewers and in conventional online (textual) self-administered questionnaires, asking the same survey questions to members of a representative sample who are randomly assigned to one of these three modes. Because VM is synchronous and "live" like face-to-face (FTF) interviewing, and VS is asynchronous and recorded but still projects a human face, the project's comparisons will provide new insights regarding how these decomposable aspects of human contact affect behavior and experience in surveys. The project's results will reveal the extent to which, and for whom, less costly interaction (live but remote vs. recorded) with an interviewer promotes engagement and data quality comparable to what is found in similar FTF interviews. More generally, the findings will address when and in what ways modern communication modes that reduce social presence and are less personal might be equal to or even more effective than FTF interaction. Findings from this project will provide valuable information relevant to the future of survey measurement and will be of interest to survey researchers in the Federal statistical system and other survey organizations.</p> <p>Even as survey data continue to be central to public policy and decision-making, survey measurement is challenged by declining response rates, increasing costs, declining trust in survey organizations, and rapidly changing communication habits among the public. Understanding how video technologies could fit into the future of survey data collection is important both because it may meet potential respondents "where they live" and because it may provide a significantly lower cost alternative to FTF interviewing. There is even the potential to reach some members of the public whose location makes FTF interviewing difficult or expensive, but who may well be able to participate in a video interview (e.g., people who live in remote rural areas or members of the military deployed overseas). In comparing data quality across these three survey modes, the project will quantify participation rates, connectivity problems, respondent compliance with the video interviewing protocol, conscientious responding (giving precise answers to numerical questions, thoughtfully differentiating answers), and disclosure of sensitive information. The project will measure the potential impact of individual interviewers, feelings of engagement with the interview, rapport with the interviewer, and respondent satisfaction. The project also will allow assessment of data collection costs across these modes. Access to and use of video technologies are not universal, and even among those with access some are willing to engage in video interaction while others are reluctant. The project will begin to address whether and how the effects of video technologies on survey data collection differ for participants with different levels of prior experience and preference for using the technologies.</p> |                      |                     |            |                          |
| SRO Project Period            | 09/2018 - 04/2021                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                      |                     |            |                          |
| Data Col Period               | 08/2019 - 11/2019                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                      |                     |            |                          |
| Security Plan                 | NA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                      |                     |            |                          |

**Milestone Dates****PreProduction Start:****Pretest End:****Staffing Completed:****SS Train Start:****DC Start:** 10/29/2019**Pretest Start:****Recruitment Start:****GIT Start:****SS Train End:****DC End:** 04/01/2020**Other Project****Team Members:**

Kallan Larsen - PSM MS Student

Ai Rene Ong - PSM PhD Student

Tianheao Wang - PSM MS Student

Kevin Jensen (TSG) - portal/Blaise programming

Shanti Suresh, Matt Hanger, &amp; Laura Yoder (TSG) - data management

Kyle Goodman - MSMS set-up programming

Jim Rodgers - MSMS consultation

Brady West - Research Associate Professor, Survey Research Center

Video Communication Technologies

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

MSMS

**Data Col Tool**

Blaise 5

**Hardware**

Desktop; Other (Webcam, USB headset)

**DE Software**

N/A

**QC Recording Tool**

N/A

**Incentive**

Yes, R

**Administration**

SRO Group; Other (CloudResearch (TurkPrime))

**Payment Type**

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

**Payment Method**

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

**Report Period**

Feb, 2022 (VCT)

**Project Phase**

Closing

**Risk Level**

On Track

**Monthly Update**

POQ rejected the first findings paper. The team revised the paper and submitted to Methods, Data, Analyses (MDA) (A online, open-access journal published by GESIS). We've heard the turn-around is faster, it's open access, and there seems to be interest in using video as a mode of data collection in Europe from conversations Andrew and Fred have had with some in Europe.

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.

Kelly (with Kallan and Andrew's help will begin the archiving process in March.

Laura needs to do a final MSMS data set.

**Special Issues****Cost**

Mar 10, 2022

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

367,162.16

**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  
Mar 10, 2022**

**Dollars Projected For Month:**

5,128.23

**Actual Dollars Used:**

4,821.19

**Variance (Projected minus Actual):**

307.04

**Reason For Variance:**

Kallan charged 10 less hours than projected.

**Measures**

|                              | Units Complete | RR    | HPI |
|------------------------------|----------------|-------|-----|
| <b>Current Goal:</b>         | 855            | 20%   |     |
| <b>Goal at Completion:</b>   | 855            |       |     |
| <b>Current actual:</b>       | 1,109          | 12.5% |     |
| <b>Estimate at Complete:</b> |                |       |     |
| <b>Variance:</b>             |                |       |     |

**Other Measures**

**Project Name** (WCJ -Remote Pilot) Woodcock-Johnson Remote Administration Pilot

**Project Mode** Primary: Telephone

**Project Type** Sponsored Projects **Project Status** Current

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

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

**Funding Agency**

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

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

**Proposal #:** no data

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

The current effort includes 2 components:

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

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

**SRO Project Period** 07/2021 - 03/2022

**Data Col Period** 02/2022 - 03/2022

**Security Plan** NA

**Milestone Dates**

**PreProduction Start:** 07/01/2021

**Pretest End:** 03/05/2022

**Staffing Completed:**

**SS Train Start:**

**DC Start:**

**Pretest Start:** 02/01/2022

**Recruitment Start:**

**GIT Start:**

**SS Train End:**

**DC End:**

**Other Project**

**Team Members:**

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

## Other Project

## Names:

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

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**Report Period** Feb, 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 recruitment and prepare for production
- Continue to provide oversight on all team tasks
- Reviewed and adjusted Jan 2022. cost report with the financial analyst
- Initiated the process of WJ Blaise Scoring

Technical System Development and Testing (Component 1):

- Continuing to monitor technical system during production

Hire and Recruitment:

- Completed in Jan 2022

Training

- Completed in Jan 2022

Production

- finalized recruitment (19 families, 40 children)
- Completed 23 Interviews
- set up 9 appointments for the 1st week of March.2022

## Special Issues

**Cost**

**Feb 28, 2022**

|                                                |                                                                                                                                                     |
|------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Total Cost to Date (Direct + Indirect):</b> | 63,994.40                                                                                                                                           |
| <b>Estimated Cost at Completion (E\$AC):</b>   | 85,449.59                                                                                                                                           |
| <b>Total Budget:</b>                           | 102,139.00                                                                                                                                          |
| <b>Variance (Budget minus E\$AC):</b>          | 16,689.41                                                                                                                                           |
| <b>Reason For Variance:</b>                    | 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 March.2022 |

**Projections**

**Feb 28, 2022**

|                                           |                                                                                                                                                     |
|-------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Dollars Projected For Month:</b>       | 22,290.77                                                                                                                                           |
| <b>Actual Dollars Used:</b>               | 21,598.12                                                                                                                                           |
| <b>Variance (Projected minus Actual):</b> | 692.65                                                                                                                                              |
| <b>Reason For Variance:</b>               | 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 March.2022 |

| Measures                     | Units Complete | RR | HPI |
|------------------------------|----------------|----|-----|
| <b>Current Goal:</b>         | 20             |    |     |
| <b>Goal at Completion:</b>   | 30             |    |     |
| <b>Current actual:</b>       | 16             |    |     |
| <b>Estimate at Complete:</b> | 30             |    |     |
| <b>Variance:</b>             |                |    |     |

## 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)<br>Salma Mawfek Khaled (Qatar University)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| Funding Agency                | Cambridgeshire and Peterborough NHS Foundation Trust                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| IRB                           | HUM#:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                       | Period Of Approval: |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| Project Team                  | Project Lead:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Sarah Elisa Broumand  |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
|                               | Budget Analyst:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Carl S Remmert        |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
|                               | Production Manager:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
|                               | Senior Project Advisor:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Gina-Qian Yang Cheung |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
|                               | Production Manager:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
|                               | Production Manager:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| Proposal #:                   | no data                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| Description:                  | SRC joins Social & Economic Survey Research Institute at Qatar University for the upcoming World Mental Health Study in Qatar to conduct CIDI train-the-trainer training and build a quality assurance tool. The timing expectation is that SRC has an initial working version of the QC tool in time for a January 2020 data collection pilot, then refinements will be made for an October 2020 production launch. The Qatar team will be using the standard CIDI questionnaire instrument (Blaise 5), and they have Blaise programming expertise and their own sample management system. SRC had originally envisioned this as a version of our OLAP Cube, but have since moved away from that and toward a more "ODS"-type approach. SRC scope of work includes CIDI training, methodological designs for in-person and phone call verification, quality control indicators/interventions, and technical designs for quality assurance infrastructure and dashboard, etc. |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| SRO Project Period            | 04/2019 - 10/2021                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| Data Col Period               | 01/2020 - 10/2021                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| Security Plan                 | NA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| Milestone Dates               | <table><tr><td>PreProduction Start:</td><td>Pretest Start:</td></tr><tr><td>Pretest End:</td><td>Recruitment Start:</td></tr><tr><td>Staffing Completed:</td><td>GIT Start:</td></tr><tr><td>SS Train Start:</td><td>SS Train End:</td></tr><tr><td>DC Start:</td><td>DC End:</td></tr></table>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                       |                     |           |                         | PreProduction Start: | Pretest Start: | Pretest End: | Recruitment Start: | Staffing Completed: | GIT Start: | SS Train Start: | SS Train End: | DC Start: | DC End: |
| PreProduction Start:          | Pretest Start:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| Pretest End:                  | Recruitment Start:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| Staffing Completed:           | GIT Start:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| SS Train Start:               | SS Train End:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| DC Start:                     | DC End:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| Other Project Team Members:   | Cheng Z. (Application Programmer), Jay L. (PM), Gina-Qian C. (SPA), Sarah B. (System Analyst)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| Other Project Names:          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| Sample Mgmt Sys               | Other (Blaise 5)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| Data Col Tool                 | Blaise 5                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| Hardware                      | Laptop; Tablet                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| DE Software                   | N/A                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| QC Recording Tool             | N/A                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| Incentive                     | Yes, Other (TBD)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| Administration                | Other (Qatar University)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| Payment Type                  | Other (TBD)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |
| Payment Method                | Other (TBD)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                       |                     |           |                         |                      |                |              |                    |                     |            |                 |               |           |         |

|                       |                                                                                                                                                                                                                  |                      |              |
|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|--------------|
| <b>Report Period</b>  | Feb, 2022 (WMH-Qatar)                                                                                                                                                                                            | <b>Project Phase</b> | Implementing |
| <b>Risk Level</b>     | On Track                                                                                                                                                                                                         |                      |              |
| <b>Monthly Update</b> | Planning to finish up automating the summary pages so that user can use a date slider. The programmer was unable to make these updates in February but the hours have been re-allocated for April for this task. |                      |              |
| <b>Special Issues</b> | None                                                                                                                                                                                                             |                      |              |



**Cost**  
**Feb 28, 2022**

*Total Cost to Date (Direct + Indirect):* 72,997.23  
*Estimated Cost at Completion (E\$AC):* 74,907.11  
*Total Budget:* 74,928.00  
*Variance (Budget minus E\$AC):* 20.89  
*Reason For Variance:* Hours have been reallocated for the upcoming months.

**Projections**  
**Feb 28, 2022**

*Dollars Projected For Month:* 954.94  
*Actual Dollars Used:* 1,001.38  
*Variance (Projected minus Actual):* -46.44  
*Reason For Variance:* no more tasks assigned.

**Measures**

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

**Other Measures**

# ***Survey Research Operations***



















## ***Monthly Project Report***

***Development Initiative and No Data Collection Projects***

***February 2022***



## Developmental/Initiative Projects Dashboard

| NonArchived Development Initiative and No-DataCol Projects |             |         |                       |                                                                                     |                                                                                     |
|------------------------------------------------------------|-------------|---------|-----------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| Project                                                    | Type        | Status  | Project Lead          | Jan                                                                                 | Feb                                                                                 |
| <i>TSME 22-Blaise 5 Testing (423562)</i>                   | Initiatives | Current | Gina-Qian Yang Cheung |  |  |
| <i>TSME SRO SYS MAINTENANCE-GENERAL (483910)</i>           | Initiatives | Current | Jeffrey L Smith       |  |  |
| <i>TSME22 Day in the life of Video</i>                     | Initiatives | Current | Vivienne Y Outlaw     |  |  |
| <i>TSME22 DCO Tech System Support FY22</i>                 | Initiatives | Current | Vivienne Y Outlaw     |  |  |
| <i>TSME22 WebTrak/WebLog CF Upgrade (425197)</i>           | Initiatives | Current | Hueichun Peng         |  |  |
| <i>TSME22-PIPPA</i>                                        | Initiatives | Current | Mark Simonson         |  |  |
| <i>TSME22-QC-Systems (483249)</i>                          | Initiatives | Current | Sarah Elisa Broumand  |  |  |
| <i>TSME22-SelfSchedUI (483424)</i>                         | Initiatives | Current | Andrew L Hupp         |  |  |
| <i>TSME22-ST international (483227)</i>                    | Initiatives | Current | Gina-Qian Yang Cheung |  |  |

## **Developmental Initiatives**

*TSME 22-Blaise 5 Testing*

*TSME22-Day in the Life Videos*

*TSME22-DCO Tech System Support*

*SME22-WebTrak/WebLog ColdFusion Server Upgrade*

*TSME22-PIPPA 2.0*

*TSME22-QC-Systems*

*TSME22-Self-Scheduling Interface for MSMS*

*TSME22-ST international*

**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**

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

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

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**Report Period** Feb, 2022 (TSME 22-Blaise 5 Testing (423562)) **Project Phase** Initiation  
**Risk Level** On Track  
**Monthly Update** low activities  
**Special Issues**  
**Cost**  
**Mar 07, 2022** *Total Cost to Date (Direct + Indirect):* 7,629.49  
*Estimated Cost at Completion (E\$AC):* 29,735.48  
*Total Budget:* 30,000.00  
*Variance (Budget minus E\$AC):* 264.52  
*Reason For Variance:* low activities

**Projections**  
**Mar 07, 2022**

*Dollars Projected For Month:* 5,526.50  
*Actual Dollars Used:* 1,676.45  
*Variance (Projected minus Actual):* 3,850.05  
*Reason For Variance:* low activites

**Measures**

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

**Other Measures**

**Project Name** (TSME22 Day in the life of Video) TSME22-Day in the Life Videos (425201)

**Project Mode** Primary: Not Available

**Project Type** Developmental Initiatives **Project Status** Current

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

**Principal Investigator/Client**

**Funding Agency**

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

**Project Team** *Project Lead:* Vivienne Y Outlaw

*Budget Analyst:* Carl S Remmert

*Production Manager:*

*Senior Project Advisor:*

*Production Manager:*

*Production Manager:*

**Proposal #:** no data

**Description:** Funding to be used to update the Day in the Life videos for both the field and SSL.

**SRO Project Period** 07/2021 - 06/2022

**Data Col Period**

**Security Plan** NA

**Milestone Dates**

*PreProduction Start:*

*Pretest End:*

*Staffing Completed:*

*SS Train Start:*

*DC Start:*

*Pretest Start:*

*Recruitment Start:*

*GIT Start:*

*SS Train End:*

*DC End:*

**Other Project** Russ Stark

**Team Members:** Barb Homburg

**Other Project**

**Names:**

**Sample Mgmt Sys** NA

**Data Col Tool** NA

**Hardware** NA

**DE Software** NA

**QC Recording Tool** NA

**Incentive** NA

**Administration** NA

**Payment Type** NA

**Payment Method** NA

**Report Period** Feb, 2022 (TSME22 Day in the life of V **Project Phase** Implementing

**Risk Level** On Track

**Monthly Update** The DCO management team reviewed the video and was very pleased. There will be a few edits in March and then the work will be finished.

**Special Issues**

**Cost** *Total Cost to Date (Direct + Indirect):* 10,246.21

**Mar 15, 2022** *Estimated Cost at Completion (E\$AC):* 10,246.21

*Total Budget:* 12,500.00

*Variance (Budget minus E\$AC):* 2,253.79

*Reason For Variance:* Some time for this project was used for mapping and the production of training materials for project trainings.

**Projections**  
**Mar 15, 2022**

**Dollars Projected For Month:**

0.00

**Actual Dollars Used:**

2,846.32

**Variance (Projected minus Actual):**

-2,846.32

**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 |
|------------------------------|----------------|----|-----|
| <b>Current Goal:</b>         |                |    |     |
| <b>Goal at Completion:</b>   |                |    |     |
| <b>Current actual:</b>       |                |    |     |
| <b>Estimate at Complete:</b> |                |    |     |
| <b>Variance:</b>             |                |    |     |

**Other Measures**



**Project Name** (TSME22 DCO Tech System Support FY22) TSME22-DCO Tech System Support (483248)

**Project Mode** Primary: Not Available

**Project Type** Developmental Initiatives **Project Status** Current

**Budget** *Direct Budget:* 30,000.00 *Indirect Budget:* 0.00 *Total Budget:* 30,000.00

**Principal Investigator/Client**

**Funding Agency**

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

**Project Team** *Project Lead:* Vivienne Y Outlaw

*Budget Analyst:* Carl S Remmert

*Production Manager:* Hueichun Peng

*Senior Project Advisor:* Gregg Peterson

*Production Manager:*

*Production Manager:*

**Proposal #:** no data

**Description:** This includes all the support and development work for a suite of tech systems DCO uses, including Fred, Recruitment Website, Iwer Web Site, etc.

**SRO Project Period** 07/2021 - 06/2022

**Data Col Period**

**Security Plan** NA

**Milestone Dates**

*PreProduction Start:*

*Pretest End:*

*Staffing Completed:*

*SS Train Start:*

*DC Start:*

*Pretest Start:*

*Recruitment Start:*

*GIT Start:*

*SS Train End:*

*DC End:*

**Other Project** Max Malhotra

**Team Members:** Shaowei Sun

**Other Project**

**Names:**

**Sample Mgmt Sys** NA

**Data Col Tool** NA

**Hardware** NA

**DE Software** NA

**QC Recording Tool** NA

**Incentive** NA

**Administration** NA

**Payment Type** NA

**Payment Method** NA

**Report Period** Feb, 2022 (TSME22 DCO Tech System **Project Phase** Implementing

**Risk Level** On Track

**Monthly Update** x

**Special Issues** x

**Cost** *Total Cost to Date (Direct + Indirect):* 19,205.07

**Mar 15, 2022** *Estimated Cost at Completion (E\$AC):* 27,591.41

*Total Budget:* 30,000.00

*Variance (Budget minus E\$AC):* 2,408.59

*Reason For Variance:* na

**Projections**  
**Mar 15, 2022**

*Dollars Projected For Month:* 2,096.58  
*Actual Dollars Used:* 467.51  
*Variance (Projected minus Actual):* 1,629.07  
*Reason For Variance:* X

**Measures**

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

**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  
**Project Mode** Upgrade (425197)  
**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**

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

**Other Project**

**Team Members:**

**Other Project**

**Names:**

**Sample Mgmt Sys** NA

**Data Col Tool** NA

**Hardware** NA

**DE Software** NA

**QC Recording Tool** NA

**Incentive** NA

**Administration** NA

**Payment Type** NA

**Payment Method** NA

**Report Period** Feb, 2022 (TSME22 WebTrak/WebLog **Project Phase** Initiation

**Risk Level** On Track

**Monthly Update** Continue to support the upgrade.  
Work with CMT to finalize other work.

**Special Issues** none.

**Cost** *Total Cost to Date (Direct + Indirect):* 6,508.49

**Mar 15, 2022** *Estimated Cost at Completion (E\$AC):* 10,969.39

*Total Budget:* 5,000.00

*Variance (Budget minus E\$AC):* -5,969.39

*Reason For Variance:* na

Projections  
Mar 15, 2022

*Dollars Projected For Month:* 1,876.80  
*Actual Dollars Used:* 2,066.73  
*Variance (Projected minus Actual):* -189.93  
*Reason For Variance:* na

Measures

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

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 End:*

*Staffing Completed:*

*SS Train Start:*

*DC Start:*

*Pretest Start:*

*Recruitment Start:*

*GIT Start:*

*SS Train End:*

*DC End:*

**Other Project** Sarah Broumand, Cheng Zhou, Andrew Piskorowski

**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** Feb, 2022 (TSME22-PIPPA) **Project Phase** Implementing

**Risk Level** On Track

**Monthly Update** Work started on bringing in projects from SurveyTrak. Additional work needed to move Olive data into ODS (including archiving of old data).

**Special Issues**

**Cost** *Total Cost to Date (Direct + Indirect):* 10,761.00

**Mar 01, 2022** *Estimated Cost at Completion (E\$AC):* 18,084.00

*Total Budget:* 18,174.00

*Variance (Budget minus E\$AC):* -429.00

*Reason For Variance:*

Projections  
Mar 01, 2022

*Dollars Projected For Month:* 2,038.00  
*Actual Dollars Used:* 1,855.00  
*Variance (Projected minus Actual):* 183.00  
*Reason For Variance:*

Measures

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

Other Measures

|                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
|--------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|--------------------------------|-----------------------------|-----------------------|---------------------|---------------------------|----------------------------|-------------------|------------------------|----------------------|------------------|----------------|
| <b>Project Name</b>                  | (TSME22-QC-Systems (483249)) TSME22-QC-Systems (483249)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Project Mode</b>                  | Primary: Not Available                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Project Type</b>                  | Developmental Initiatives                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Project Status</b>        | Current                        |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Budget</b>                        | <b>Direct Budget:</b> 30,000.00                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <b>Indirect Budget:</b> 0.00 | <b>Total Budget:</b> 30,000.00 |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Principal Investigator/Client</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Funding Agency</b>                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>IRB</b>                           | <b>HUM#:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <b>Period Of Approval:</b>   |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Project Team</b>                  | <b>Project Lead:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Sarah Elisa Broumand         |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
|                                      | <b>Budget Analyst:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Carl S Remmert               |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
|                                      | <b>Production Manager:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
|                                      | <b>Senior Project Advisor:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Gina-Qian Yang Cheung        |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
|                                      | <b>Production Manager:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
|                                      | <b>Production Manager:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Proposal #:</b>                   | no data                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Description:</b>                  | Project used to maintain and further develop Current QC systems such as OLIVE                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>SRO Project Period</b>            | 07/2022 - 06/2022                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Data Col Period</b>               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Security Plan</b>                 | NA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Milestone Dates</b>               | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"><b>PreProduction Start:</b></td> <td style="padding: 5px;"><b>Pretest Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>Pretest End:</b></td> <td style="padding: 5px;"><b>Recruitment Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>Staffing Completed:</b></td> <td style="padding: 5px;"><b>GIT Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>SS Train Start:</b></td> <td style="padding: 5px;"><b>SS Train End:</b></td> </tr> <tr> <td style="padding: 5px;"><b>DC Start:</b></td> <td style="padding: 5px;"><b>DC End:</b></td> </tr> </table> |                              |                                | <b>PreProduction Start:</b> | <b>Pretest Start:</b> | <b>Pretest End:</b> | <b>Recruitment Start:</b> | <b>Staffing Completed:</b> | <b>GIT Start:</b> | <b>SS Train Start:</b> | <b>SS Train End:</b> | <b>DC Start:</b> | <b>DC End:</b> |
| <b>PreProduction Start:</b>          | <b>Pretest Start:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Pretest End:</b>                  | <b>Recruitment Start:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Staffing Completed:</b>           | <b>GIT Start:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>SS Train Start:</b>               | <b>SS Train End:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>DC Start:</b>                     | <b>DC End:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Other Project Team Members:</b>   | Shaowei Sun, Mark Simonson, LihShwu Key, Andrew P, Hueichun Peng, Larry Daher                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Other Project Names:</b>          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Sample Mgmt Sys</b>               | NA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Data Col Tool</b>                 | NA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Hardware</b>                      | NA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>DE Software</b>                   | NA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>QC Recording Tool</b>             | NA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Incentive</b>                     | NA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Administration</b>                | NA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Payment Type</b>                  | NA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |
| <b>Payment Method</b>                | NA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                              |                                |                             |                       |                     |                           |                            |                   |                        |                      |                  |                |

|                       |                                                                                                                                                                                                                                                                                                                                                                                     |                      |              |
|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|--------------|
| <b>Report Period</b>  | Feb, 2022 (TSME22-QC-Systems (483:)                                                                                                                                                                                                                                                                                                                                                 | <b>Project Phase</b> | Implementing |
| <b>Risk Level</b>     | On Track                                                                                                                                                                                                                                                                                                                                                                            |                      |              |
| <b>Monthly Update</b> | MSMS servers were upgraded which required some work on the Olive side to reference the new servers. Originally, the assumption was that projects would only use one id during the production period, but it was found that some people got new SRO Id's assigned mid project. Olive also had to be adjusted to accommodate interviewer id's changing from 8 digit ID's to SRO Id's. |                      |              |
| <b>Special Issues</b> |                                                                                                                                                                                                                                                                                                                                                                                     |                      |              |

**Cost**  
**Feb 28, 2022**

***Total Cost to Date (Direct + Indirect):*** 13,422.56  
***Estimated Cost at Completion (E\$AC):*** 22,938.33  
***Total Budget:*** 30,000.00  
***Variance (Budget minus E\$AC):*** 7,061.67  
***Reason For Variance:*** Hours will be reallocated soon to accommodate changes for new inter-rater reliability feature in Olive.

**Projections**  
**Feb 28, 2022**

***Dollars Projected For Month:*** 2,658.39  
***Actual Dollars Used:*** 2,647.94  
***Variance (Projected minus Actual):*** 10.45  
***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 |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|----|-----|
| <i><b>Current Goal:</b></i><br><i><b>Goal at Completion:</b></i><br><i><b>Current actual:</b></i><br><i><b>Estimate at Complete:</b></i><br><i><b>Variance:</b></i> |                |    |     |

**Other Measures**



**Project Name** (TSME22-SelfSchedUI (483424)) Self-Scheduling Interface for MSMS

**Project Mode** Primary: Not Available

**Project Type** Developmental Initiatives **Project Status** Current

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

**Principal Investigator/Client**

**Funding Agency**

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

**Project Team** *Project Lead:* Andrew L Hupp  
*Budget Analyst:* Megan Gomez-Mesquita  
*Production Manager:*  
*Senior Project Advisor:*  
*Production Manager:*  
*Production Manager:*

**Proposal #:** no data

**Description:** This technical initiative will continue the work of the respondent facing scheduling interface that wasn't able to be completed the prior fiscal year. In the prior fiscal the basic scheduling tool was created. The current remaining work centers around creating the manager side interface to be able to set parameters and the resulting data MSMS will need to provide the Blaise scheduler. Most of the development work is on the MSMS side to build and interface and the aggregation of data to pass to Blaise to use to determine which appointment slots can be shown on the screen. This budget is for the Blaise side of the work, not the MSMS portion.

**SRO Project Period** 07/2021 - 06/2020

**Data Col Period**

**Security Plan** NA

**Milestone Dates**

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

**Other Project** James Rodgers - Tech Lead

**Team Members:** Holly Ackerman - Developer (MSMS API and other appointment related work)  
 Peter Sparks - Developer (R facing page)

**Other Project**

**Names:**

**Sample Mgmt Sys** NA

**Data Col Tool** Blaise 5

**Hardware** NA

**DE Software** N/A

**QC Recording Tool** N/A

**Incentive** Not used

**Administration** N/A

**Payment Type** N/A

**Payment Method** N/A

**Report Period** Feb, 2022 (TSME22-SelfSchedUI (483424)) **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**

|                     |                                                |           |
|---------------------|------------------------------------------------|-----------|
| <b>Cost</b>         | <i>Total Cost to Date (Direct + Indirect):</i> | 1,363.89  |
| <b>Mar 07, 2022</b> | <i>Estimated Cost at Completion (E\$AC):</i>   | 9,920.34  |
|                     | <i>Total Budget:</i>                           | 10,000.00 |
|                     | <i>Variance (Budget minus E\$AC):</i>          | 79.66     |
|                     | <i>Reason For Variance:</i>                    |           |

|                     |                                           |      |
|---------------------|-------------------------------------------|------|
| <b>Projections</b>  | <i>Dollars Projected For Month:</i>       | 0.00 |
| <b>Mar 07, 2022</b> | <i>Actual Dollars Used:</i>               | 0.00 |
|                     | <i>Variance (Projected minus Actual):</i> | 0.00 |
|                     | <i>Reason For Variance:</i>               |      |

| Measures | Units Complete        |  |  | RR | HPI |
|----------|-----------------------|--|--|----|-----|
|          |                       |  |  |    |     |
|          | 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 End:*

*Staffing Completed:*

*SS Train Start:*

*DC Start:*

*Pretest Start:*

*Recruitment Start:*

*GIT Start:*

*SS Train End:*

*DC End:*

**Other Project** many members

**Team Members:**

**Other Project** ST international (483227)

**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** Feb, 2022 (TSME22-ST international (483227)) **Project Phase** Initiation

**Risk Level** On Track

**Monthly Update** Working on the new CARI feature

**Special Issues**

**Cost** *Total Cost to Date (Direct + Indirect):* 16,644.98

**Mar 07, 2022** *Estimated Cost at Completion (E\$AC):* 35,316.21

*Total Budget:* 40,000.00

*Variance (Budget minus E\$AC):* 4,683.79

*Reason For Variance:* on schedule for the new feature development

Projections  
Mar 07, 2022

Dollars Projected For Month: 5,133.07  
Actual Dollars Used: 3,841.13  
Variance (Projected minus Actual): 1,291.94  
Reason For Variance: no changes

Measures

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

Other Measures