Survey Research Operations

Monthly Project Report

Sponsored

April 2022

Sponsored Projects

(AFHS) American Family Health Study
(ALS Controls) ALS Matched Control Recruitment
(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
(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
(HRS-Neuro) HRS Neuroimaging Pilot
(IHDS3) India Human Development Survey Wave 3
(MARS 2) Malaysia Ageing and Retirement Study Wave 2
(MI CReSS (Year 2)) Michigan COVID-19 Recovery Surveillance Cohort Study
(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027
(MTF HID 22) MTF High Intensity Drinking 2022
(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027
(PSID21) Panel Study of Income Dynamics 2021
(PSID23 Online Contact Update) Panel Study of Income Dynamics 2023 Online Contact Update
(PSID-PR) Puerto Rico Panel Study of Income Dynamics
(SCA 2022) Surveys of Consumer Attitudes
(SCIP 2021) Sustainability Culture Indicators Project
(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

Sponsored Projects Dashboard

NonArchived Sponsored Projects

Project	Type	Status	Project Lead	Jan	Feb	Mar	Apr
AFHS	Sponsored	Current	Rebecca Gatward	🟢	🟡	🟢	🟡
ALS Controls	Sponsored	Current	Rebecca Loomis	🟡	🟡	🟡	🔴
BFY	Sponsored	Current	Piotr Dworak	🟢	🟢	🟢	☐
C.A.R.E. 2022	Sponsored	Current	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟡
CAMS 2021	Sponsored	Current	Deborah Zivan	🟢	🟢	🟢	🟢
CDS-21	Sponsored	Current	Sarah Crane	🟢	🟢	🟢	🟢
ECHO (Year 6)	Sponsored	Current	Terri Ann Ridenour	🟢	🟢	🟡	🟢
EDC Midline	Sponsored	Current	Barbara Lohr Ward	🟢	🟢	🟡	🟢
EDC-SS Phases 3-4	Sponsored	Current	Karin Schneider	🟢	🟢	🟢	🟢
HCAP 2022	Sponsored	Current	Maureen Joan O'Brien	🟢	🟢	🟢	🟢
HRS 2021 OYMS / COVID Survey	Sponsored	Current	Ian Ogden	🟢	🟢	🟢	🟢
HRS 2022 Panel	Sponsored	Current	Evanthia Leissou	🟡	🟢	🟡	🟡
HRS2022-Screening	Sponsored	Current	Evanthia Leissou	🟢	🟢	🟡	🟢
HRS-Neuro	Sponsored	Current	Ian Ogden	☐	☐	☐	🟢
IHDS3	Sponsored	Current	Gina-Qian Yang Cheung	☐	☐	☐	🟢
MARS 2	Sponsored	Current	Margaret Lee Hudson	🟢	🟢	🟢	🟢
MI CReSS (Year 2)	Sponsored	Current	Terri Ann Ridenour	🟢	🟢	🟢	🟢
MTF Base Year 2022_27	Sponsored	Current	Rebecca Gatward	☐	☐	☐	🟢
MTF HID 22	Sponsored	Current	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢
MTF Panel 2022-27	Sponsored	Current	Donnalee Ann Grey-Farquharson	☐	☐	☐	🟢
PSID TAS 2021	Sponsored	Current	Piotr Dworak	🟢	🟢	🟢	☐
PSID21	Sponsored	Current	Shonda R Kruger-Ndiaye	🟢	🟢	🟢	🟢
PSID23 Online Contact Update	Sponsored	Current	Camila Kendall	☐	☐	☐	🟢
PSID-PR	Sponsored	Current	Shonda R Kruger-Ndiaye	☐	☐	☐	🟢
SCA 2022	Sponsored	Current	Theresa Camelo	🟢	🟢	🟢	🟢
SCIP 2021	Sponsored	Current	Maureen Joan O'Brien	🟢	🟢	🟢	🟢
SSRC Web Survey	Sponsored	Current	Karin Schneider	☐	🟢	🟢	🟢
STARRS-LS Waves 3 & 4	Sponsored	Current	Meredith A House	🟡	🟡	🟡	🟡
VCT	Sponsored	Current	Andrew L Hupp	🟢	🟢	🟢	🟢
WCJ -Remote Pilot	Sponsored	Current	Hongyu Johnson	🟢	🟢	🟢	🟢
WMH-Qatar	Sponsored	Current	Sarah Elisa Broumand	🟢	🟢	🟢	🟢

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:	Lloyd Fate Hemingway
	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 - 04/2022
Security Plan	NA
Milestone Dates	

PreProduction Start:	09/01/2018	*Pretest Start:*	
Pretest End:		*Recruitment Start:*	
Staffing Completed:		*GIT Start:*	
SS Train Start:		*SS Train End:*	
DC Start:	04/21/2020	*DC End:*	04/30/2022

Other Project Team Members:	SRO Team: Andrew Hupp, Laura Yoder, Rose Zdybel, Kallan Larsen, Lloyd F Hemingway, 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
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	Apr, 2022 (AFHS)	**Project Phase**	Closing
Risk Level	*Some Concerns*		

Monthly Update	April update

Response on 4/21

We have received 3605 completed screener forms (RR 16.7%). The eligibility rate is 59.8%. Of the 2155 eligible cases, 1375 have completed the main interview at a response rate of 64% (3 additional completed surveys since 3/31).

- This month we have 'closed' the survey, entered data from the last few paper surveys received, dispatching TOAs to the last few Respondents and prepared paper materials currently stored in Perry to send to off-site storage.

We have also been planning two additional pieces of work -

- A survey aimed at assessing the Replicate 2 respondents interest in participating in a panel. The protocol is very simple - DataForce will mail an invite, an email invite will be sent to Selected Rs (all rep 2 participants) we have an email address for (84%). Non-responders will receive up to three email/text reminders (no varying text/language and all reminders will be sent on the same day to all non-responders), a paper survey which will be mailed by DF and then the option of a phone follow-up - which will depend on response at that point in the protocol.

- A non-response follow-up (FTF/TEL) with ~40 non-respondents in neighborhoods with more than 10% African-Americans or Hispanics with the goal of gathering information about why they decided not to participate.

Special Issues	The additional scope (panel feasibility and non-response follow-up) will be funded using sequestered funds (on a separate short code). The PI group have also agreed to fund the overspend on the main AFHS budget.

Cost **May 17, 2022**	
Total Cost to Date (Direct + Indirect):	2,512,634.96
Estimated Cost at Completion (E$AC):	2,512,634.96
Total Budget:	2,490,133.00
Variance (Budget minus E$AC):	-22,501.96
Reason For Variance:	The project ran for much longer than originally planned which required more management time. The PI group has agreed to pay the overspend amount on this main AFHS budget.

Projections
May 17, 2022

Dollars Projected For Month:		8,800.29
Actual Dollars Used:		7,566.07
Variance (Projected minus Actual):		1,234.22
Reason For Variance:		

Measures

	Units Complete	RR	HPI
Current Goal:	2000 (main IWs)	33.3%	NA
Goal at Completion:	2000	33.3%	NA
Current actual:	1375	60%	NA
Estimate at Complete:	1300	64%	NA
Variance:	700	+34% (see below)	NA

Other Measures

Reporting main response rate for Rep 2 above and estimates used in the proposal (screener RR details are below)...
Estimates used in the proposal...
Screener RR - 50% (used in the proposal) - Full sample 42,120, goal 50% screener RR to achieve a sample of 12,000 eligible Rs (eligibility rate 57%), achieve main interviews with 4,000 (RR 33.3%).
Rep 1 achieved...
Rep 1 sample (n=19,381), actual screener RR 14% (n=2523), eligible Rs 1489 (elibility rate 59%), main RR 66% (n=998).
Rep 2 current ...
Rep 2 sample (n=22,381), current actual screener RR 16.7% (n=3605), current eligibility rate 59.8% (n=2155), current main RR 64% (n=1375)

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 Apr, 2022 (ALS Controls)   **Project Phase** Closing

Risk Level *Attention!*

Monthly Update April 2022: This project was closed March 31, 2022.

Special Issues

Cost
Apr 08, 2022

Total Cost to Date (Direct + Indirect):	89,998.59
Estimated Cost at Completion (E$AC):	89,998.59
Total Budget:	255,139.51
Variance (Budget minus E$AC):	165,140.92
Reason For Variance:	No more projections – account closed on 3/31/2022

Projections
Apr 08, 2022

Dollars Projected For Month:	1,341.69
Actual Dollars Used:	980.30
Variance (Projected minus Actual):	361.39
Reason For Variance:	No more projections – account closed on 3/31/2022

Measures

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

Other Measures

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

Project Status Current

Budget	**Direct Budget:** 3,583,669.00 **InDirect Budget:** 931,755.00 **Total Budget:** 4,515,424.00
Principal Investigator/Client	Dr. Steven Broglio (U of M Kinesiology) Dr. Michael McCrea (Medical College of Wisconsin) Dr. Thomas McAllister (Indiana University School of Medicine)
Funding Agency	
IRB	**HUM#:** 00202691 **Period Of Approval:** 7/23/2021 - open
Project Team	**Project Lead:** Donnalee Ann Grey-Farquharson **Budget Analyst:** Mary Johnson **Production Manager:** Sharon K Parker **Senior Project Advisor:** Barbara Lohr Ward **Production Manager:** Hongyu Johnson **Production Manager:** Keith Liebetreu
Proposal #:	no data
Description:	SRO will provide consultation, respondent locating activities and data collection for respondents in the longitudinal Concussion Assessment, Research and Education (CARE) study, with the goal of securing participation from 7,500 unique past-CARE study participants. Participants will complete the same set of study assessments at two time points over the five-year project period. The project follows collegiate athletes post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure. Specifically, SRO decentralized field interviewers will locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web. This budget assumes an overall SRO involvement period of approximately 44 months over two waves. Wave 1 SRO involvement will begin in December 2021 with data collection taking place over approximately 12 months, beginning approximately May 2022. Wave 2 SRO involvement will begin in November 2023 with data collection taking place over approximately 12 months starting in May 2024. Currently, the total cost for the overall scope of work (based on the currently committed funding from all sources) is estimated at $4,685,914. This includes $3,718,978 direct and $966,936 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders). As additional sources of funding are identified and those resources committed to SRO survey data collection activities, or inversely if a funder withdraws or reduces their level of funding to the project, the scope of work (e.g., the number of interviews to be collected) will increase or decrease respectively. The estimate of funding contributed by the Department of Defense through the MTEC RFP is $2,277,689. This includes $1,807,689 direct costs and $470,000 indirect costs budgeted at the 26% indirect cost rate. The proposed period of support is September 1, 2021 through August 31, 2025.
SRO Project Period	10/2021 - 08/2026
Data Col Period	03/2022 - 02/2026
Security Plan	NA
Milestone Dates	

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

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

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

Report Period	Apr, 2022 (C.A.R.E. 2022)	**Project Phase**	Implementing

Risk Level *Some Concerns*

Monthly Update

System
Production for CARE is progressing slowly. There is a major setback with a registration process for respondents that the systems vendor put in place. Respondents are required to register by inputting what is sometimes outdated forgotten data and afterwards, they then login. In addition to the double barrier in place the many system bugs encountered in this process is an additional cause for concern. There are other system issues but currently this one has the potential for the most harm to the project. The PIs have been made aware, even before implementation, that methodologically this is a was/is not a good idea.

Production
Interviewers are adjusting well to the non-SRO system. Unfortunately, they are also acting as tech support for respondents but have been troopers in this.

DMSS
The system vendor is to give deliver data daily but have failed to come through. In the interim SRO has been given access to download the required data from their database. The data dictionary was not updated and so this delayed our ability to produce accurate production dashboard and other reports including an FPR. We expect to have these in place by the end of May.

Hiring
CARE is hiring more interviewers to support (mainly) the Military data collection. Training will be in Mid-June or July.

Special Issues

Cost
Apr 30, 2022

Total Cost to Date (Direct + Indirect):	0.00
Estimated Cost at Completion (E$AC):	0.00
Total Budget:	4,515,424.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	No budget values are available for April. Carl R. is working to have it all in by May. Ryan is aware and has informed Admin

Projections
Apr 30, 2022

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	No budget values are available for April. Carl R. is working to have it all in by May. Ryan is aware and has informed Admin.

Measures

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

Other Measures

Project Name	(CAMS 2021) HRS 2021 Consumption and Activity Mail Study
Project Mode	Primary: Mail Total of Modes: 1
Project Type	Sponsored Projects

Project Status   Current

Budget	*Direct Budget:*	293,821.00	*InDirect Budget:*	105,776.00	*Total Budget:* 399,597.00

Principal Investigator/Client	David Weir (ISR-SRC)
Funding Agency	

IRB *HUM#:* HUM00079949 *Period Of Approval:* 1/28/2021 - 1/27/20

Project Team
Project Lead:	Deborah Zivan
Budget Analyst:	Grace Tison
Production Manager:	
Senior Project Advisor:	Nicole G Kirgis
Production Manager:	Evanthia Leissou
Production Manager:	

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

Milestone Dates

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

Other Project Team Members:	Data Manager: Laura Yoder, Jennie Williams Programmer: Ashwin Dey Project Assistant: Jeannie Baker, Janet McBride, Melissa Luker
Other Project Names:	CAMS
Sample Mgmt Sys	MSMS
Data Col Tool	SAQ
Hardware	Paper and Pencil
DE Software	Other (HRS study staff is responsible for)
QC Recording Tool	N/A
Incentive	Yes, R; Yes, Other (Spouse)
Administration	SRO Group
Payment Type	Check, prepaid ($25 to main R and $10 to spouse R)
Payment Method	Check through STrak RPay System

Report Period	Apr, 2022 (CAMS 2021)

Project Phase   Closing

Risk Level	*On Track*
Monthly Update	- Decreased logging as a result of decrease returned questionnaires - Continued shipping of completed questionnaires to project staff
Special Issues	n/a

Cost
May 06, 2022

Total Cost to Date (Direct + Indirect):	442,614.61
Estimated Cost at Completion (E$AC):	388,323.41
Total Budget:	399,597.00
Variance (Budget minus E$AC):	11,273.59
Reason For Variance:	A smaller sample size and larger number of voided TOAs largely account for the budget variance.

Projections
May 06, 2022

Dollars Projected For Month:	1,391.80
Actual Dollars Used:	686.57
Variance (Projected minus Actual):	705.23
Reason For Variance:	A smaller number of hours than anticipated were required to process incoming SAQs.

Measures

	Units Complete	RR	HPI
Current Goal:	5256	66.4%	
Goal at Completion:	5256	66.4%	
Current actual:	4289	59.0%	
Estimate at Complete:	4289	59.0%	
Variance:	967	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

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

Other Project Team Members:	Rachel Orlowski Project Consultant Peggy Lavanger Production Management QC Support Kallan Larsen Training Coordinator Kasyera Kowalczyk Project Management Support
Other Project Names:	
Sample Mgmt Sys	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop; [UM cell] Phone
DE Software	NA
QC Recording Tool	DRI-CARI
Incentive	Yes, R
Administration	NA
Payment Type	Other (electronic payment)
Payment Method	Check through STrak RPay System

- -

Report Period	Apr, 2022 (CDS-21)	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update	Data collection on the CS instrument concluded in late April. The project achieved an 80% RR, falling short of the budgeted goal of 90%. Field staff continue with their FTF NRFU efforts, with the planned expansion to non-final PCG lines in May. Interviewer hours have been decreasing as sample diminishes. The project has experienced limited attrition, so we feel the shortfall in hours is likely due to sample availability and not staffing limitations. We are on

track to conclude data collection 6/18/22.

Special Issues

Cost
May 06, 2022

Total Cost to Date (Direct + Indirect):	1,575,930.81
Estimated Cost at Completion (E$AC):	2,242,438.86
Total Budget:	2,288,240.00
Variance (Budget minus E$AC):	45,801.14
Reason For Variance:	We continue to build an underrun through consecutive months of underruns and slowing Iwer hours.

Projections
May 06, 2022

Dollars Projected For Month:	206,083.76
Actual Dollars Used:	181,670.88
Variance (Projected minus Actual):	24,412.88
Reason For Variance:	This underrun ($15k direct) was mainly due to less hours charged by management.

Measures

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

Other Measures

Component	goal units completed	current actual
Coverscreen	1886	1691
PCG Blaise interview	1697	1434
Child Blaise interview	966	599
IVR	710	517

Component	RR	
Coverscreen	90%	80%
PCG Blaise interview	90%	85%
Child Blaise interview	85%	54%*
IVR	90%	86%

*RR of Child Iw where PCG provided consent = 74%

Project Name	(ECHO (Year 6)) Environmental Influences on Child Health Outcomes
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 3
Project Type	Sponsored Projects
	Project Status Current

Budget	*Direct Budget:*	273,933.00	*InDirect Budget:*	153,403.00	*Total Budget:* 427,336.00

Principal Investigator/Client	Nigel Paneth (Michigan State University) Michael Elliott (University of Michigan) Jean Kerver (Michigan State University)
Funding Agency	NIH
IRB	*HUM#:* HUM00139050 *Period Of Approval:* 10/2/2021-8/13/2022
Project Team	*Project Lead:* Terri Ann Ridenour *Budget Analyst:* Parina Kamdar *Production Manager:* *Senior Project Advisor:* Evanthia Leissou *Production Manager:* Ian Ogden *Production Manager:* Sharon K Parker
Proposal #:	no data

Description:

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

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

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

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

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

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

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

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

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

Other Project Names:

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

Report Period	Apr, 2022 (ECHO (Year 6))	**Project Phase**	Implementing
Risk Level	*Some Concerns*		

Monthly Update

[Phase 1: Recruitment and Prenatal Surveys]

Recruitment continues in 7 prenatal clinics.

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

Production Stats

To date, 1,503 women have been recruited in clinics across the state of Michigan. Among those cases, 980 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 130 women to meet their goal of 1,100.

Prenatal Survey 1: 859
Prenatal Survey 2: 646

[Phase 2: 3-Month Data Collection Summary]
    Babies born: 860
    3-month sample released: 814
    3-month interviews completed: 581
    Average attempts / Iw: 7.8
    Iw length: 46 min.
    Response Rate: 73%
    3-month biospecimen collected: 338

[Phase 3: Age 4 REDCap Survey]

    Age-4 sample released: 21
    REDCap surveys completed: 9
    Response Rate: 43%

[Phase 3: Age 4 In-Person Visit Protocols]

We had our first in-person visit in the home on Friday, May 13. This is a huge milestone for this study.

Data collection expected to begin the first week of May. Physical measures, biospecimen and cognitive assessments outlined below:

--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

Special Issues

We are working with the proposal group on the Y7 project budget. Please see proposal number 20-0054C02. SRO will continue to maintain three distinct (Phase 1-3) technical systems and all study protocols in this final budget year of the study. No word yet on whether an ECHO 2 study will be awarded after this final year of the original study.

A new data manager has been assigned to work on ECHO and we are working with the DataOps group and TSG Admin to consolidate our 4 separate data management roles into one. This dedicated data manager will oversee all Phase 1-3 data management responsibilities within the 30-40 hours allocated for these data management roles on ECHO.

Cost
May 06, 2022

Total Cost to Date (Direct + Indirect):	273,310.69
Estimated Cost at Completion (E$AC):	448,765.19
Total Budget:	427,336.00
Variance (Budget minus E$AC):	-21,429.19
Reason For Variance:	We believe the overall Year 6 budget includes sufficient time for SRO to learn protocols, train any additional Iwers needed for the summer and administer the Age 4 protocols (REDCap, in-person visit, including assessments, physical measures and specimen collection). That is, to support SRO's overall scope of work for project budget Year 6 (Phase 1: Recruitment; Phase 2: 3-month Interview; and Phase 3: Age 4 protocols). We'll continue to monitor as we just had our first in-person visit, which is a significant part of the Age 4 scope of work. We're using the current Age 4 rolling sample projections and the ECHO Y6 project proposal budget assumptions for response rate and HPI estimates. We will update projections over time as we have actual costs and data to compare with.

Projections
May 06, 2022

Dollars Projected For Month:	44,122.17
Actual Dollars Used:	54,293.57
Variance (Projected minus Actual):	10,171.40
Reason For Variance:	Age 4 in-person protocol training, travel, hosting and supplies costs were more than projected. We'll start to incur main data collection expenses as we implement Age 4 in-person visits in the home across the state of Michigan. We'll continue to update projections to reflect actual costs as we launch these brand new in-person 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 (Universityof Michigan)

Funding Agency

IRB	**HUM#:**	HUM00145626/CR **Period Of Approval:**	1/25/2021-1/18/2022
Project Team	**Project Lead:**	Barbara Lohr Ward	
	Budget Analyst:	Megan Gomez-Mesquita	
	Production Manager:	Barbara Aghababian-Homburg	
	Senior Project Advisor:	Nicole G Kirgis	
	Production Manager:	Donnalee Ann Grey-Farquharson	
	Production Manager:	Melissa Luker	

Proposal #:   no data

Description: The overall project is funded by a consortium (currently consisting of both OpenResearch Lab (Open) and NIH.

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

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

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

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

All remaining cases will be interviewed by telephone (approximately 2,550 interviews). Telephone interviews will be administered from the SSL and by decentralized field staff. With each respondent, SRO will:
  - Confirm continued consent to participate (no actual consent forms will be reviewed with respondents, and no signatures are required at the midline measurement)
  - Request contact information for friends and family to help locate the respondent in the future if we cannot reach them
  - Administer the questionnaire (approximately 80 minutes in length)
Approximately 14,635 interviewer hours are allocated for these activities (based on estimated HPIs of 5.5 and 6.0 for telephone interviews completed by the SSL and by decentralized field interviewers, respectively).

Post Collection Processing:
• SRO will conduct standard data cleaning and produce a preliminary and final dataset with documentation.

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

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

SRO Project Period	09/2021 - 10/2022
Data Col Period	03/2022 - 07/2022
Security Plan	NA

Milestone Dates

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

Other Project Team Members:	Kirsten Alscer (SPA), Barbara Ward (Project Lead) , Donnalee Grey-Farquharson (Project Manager) Marsha Skoman (Tech Lead), Jeff Smith (Tech Lead backup), Peter Sparks (Blaise Programmer), Ashwin Dey (Webtrak Programmer), Stephanie Windisch (Data Manager), Barb Homburg (Production manager, Field), William Keating (Production manager, SSL), Megan Gomez-Mesquita (Financial Analyst)
Other Project Names:	EDC
Sample Mgmt Sys	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	Camtasia
Incentive	Yes, R
Administration	SRO Group; Other (PI Payment)
Payment Type	Cash, prepaid ($50 Goodwill Token); Cash, post ($50); Other ($50 - Kept Appt)
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox); Other (Electronic payment by PIs)

— —

Report Period	Apr, 2022 (EDC Midline)	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update	During April 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.
• Reviewed interview recordings to check for proper administration
• Conducted instrument testing
• Conducted Virtual training for on-staffers 4/28 through May 2
o Finalized the training agendas, training assignments and schedule

o   Finalized and printed training manual and materials
o   Prepared powerpoint slides
o   Conducted training

Task 2: Sampling
•   No activity this month

Task 3: Questionnaire Development
•   Reviewed/corrected Spanish translations, provided updates to the project management team.
•   Finalized preparation of Spanish specification for programmers.
•   Updated English questionnaire specification as needed for minor changes; provided specification updates to the programmers.

Task 4: CAI Programming
•   Programmed minor questionnaire changes.
•   Began preparation of Spanish questionnaire.

Task 5: Systems Programming
•   Sample Management Systems
o   Programmed bug fixes, adjustments requested by the field in the sample management system (wizard issue impacting payment, other minor changes).
o   Finalized programming on production reports, promoted to production.
o   Made adjustments/modifications to Webtrak (SRO's production management system) as necessary.
o   Prepared production preload SurveyTrak and the Self-Scheduler (releases 1, 2 and 13). Began preparation for releases 3, 4 and 5.
o   Prepared preload for virtual training for 9 interviewers (training and certification).
o   Provided Help Desk support to field and SSL interviewers - triaged and fixed field data collection issues as necessary.

•   Self-Scheduler
o   Loaded production data for releases 1, 2 and 13. Began preparation for releases 3, 4 and 5.
o   Loaded preload for training and certification sample lines.
o   Adjusted time slots in self-scheduler as needed.
o   Designed and programmed administrative reports for self-scheduler
o   Designed and programmed adjustment to self-scheduler that separated field schedule from SSL schedule.
☐   Tested, adjusted and finalized
•   Daily Deliverables Specifications
o   Prepared and delivered daily production data from SurveyTrak, Self-scheduler, and Blaise

Tasks 6, 7: Interviewer Recruitment & Hiring, Training
•   See Management Task for additional Training preparation tasks.
•
•   Finalized hiring for field interviewers (end of April training). Processed onboarding paperwork.
•   Modified training agenda and presentation slides for the virtual training.
•   Prepared and shipped training materials to new field interviewers (for end of April training).
•   Recruitment/Hiring
o   Posted for and began recruitment for a possible June Survey Services Lab training (training ultimately cancelled due to field efficiency).
o   Posted open positions for Field interviewers; recruited 9 Field interviewers.
o   Conducted final on-boarding paperwork for 9 field interviewers.
•   Interviewer training
o   Conducted three-hour Train-the-Trainer
o   Conducted 4-day virtual interviewer training for 9 field interviewers

Task 8: Main Data Collection
•   Monitored and responded to incoming email, assisted SSL team with entry of appointments from self-scheduler.
•   Reviewed recordings from completed interviews.
•   Prepared and distributed laptops and cell-phones for new field interviewers.

- Conducted data collection –
o   243 Completed telephone interviews
o   2 other finalized cases
- Quality Control
o   Finalized the set up for quality control systems (quality assurance on completed interviews and verification).
o   Conducted quality assurance reviews of completed interviews.

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:

New Updates:

• Hours per interview (HPI) are lower than budgeted due to exceptionally heavy use of the self-scheduler.

o The planned recruitment and June training for Survey Services Lab interviewers has been cancelled. The low HPI and continued heavy use of the self-scheduler by respondents will allow the study to finish without the need to recruit additional SSL interviewers

• Special COVID-19 mitigation procedures in the Survey Services Lab were cancelled in April. SSL interviewers turned in cell phones and laptops. Only SSL team leaders retain laptops and cell phones, with one additional cell phone held at the SSL front desk. This will result in lower costs for these items. Projections are being updated.

• We are projecting a substantial underrun for the project

☐ The project hired and trained a lower number of interviewers than anticipated, and the trainings were shorter than had been budgeted. This will result in lower than anticipated hosting and training travel costs.

☐ Hours per interview are exceptionally low due to heavy use of the self-scheduler.

Past/Ongoing:

• 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 April 28-30, May 2.

o SRO will also conduct another local recruitment to bring on more Lab interviewers. The date of this training is to be determined. This recruitment/training has been cancelled.

o Dallas face-to-face cases will be handled by travelers.

• Schedule –

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 Programming hours for the main survey instrument are running higher than anticipated due to unexpected complications in the household roster and roster follow-up questions

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.

• 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

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. NOTE: COVID-19 measures ended in April. Interviewers kept laptops and phones for one month of the production period. SSL Team Leaders will continue to keep laptops and phones, and one phone will remain in the SSL.

- 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
- April 14, 2022 - approval of revision to Self Scheduler to allow different tracks for SSL versus Field scheduling $5,623 direct, $7,895 total cost.

Cost
May 17, 2022

Total Cost to Date (Direct + Indirect):	577,967.90
Estimated Cost at Completion (E$AC):	2,008,771.05
Total Budget:	2,124,151.00
Variance (Budget minus E$AC):	115,379.95

Reason For Variance: We are projecting a substantial underrun for the project. The project hired and trained a lower number of interviewers than anticipated, and the trainings were shorter than had been budgeted. This will result in lower than anticipated hosting and training travel costs. Hours per interview are exceptionally low due to heavy use of the self-scheduler. This is resulting in a large anticipated variance in production interviewing costs.

Projections
May 17, 2022

Dollars Projected For Month:	236,097.43
Actual Dollars Used:	201,049.41
Variance (Projected minus Actual):	35,048.02

Reason For Variance: We trained far fewer interviewers than anticipated due to attrition before training. This caused a large variance in anticipated hosting and travel expenses for training, AND the hosting expenses of $25,000 did not hit in April as anticipated. One staff member did not complete a timesheet in time, resulting in a variance for that person's salary and fringe. Hours per interview for production interviewing are far lower than anticipated due to heavy use of the self-scheduler. This is resulting in lower interviewer hours than anticipated.

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

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	Apr, 2022 (EDC-SS Phases 3-4) **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	Virtually no activity except planning for new hires.
Special Issues	

Cost
May 09, 2022

Total Cost to Date (Direct + Indirect):	124,615.00
Estimated Cost at Completion (E$AC):	422,251.00
Total Budget:	408,935.00
Variance (Budget minus E$AC):	13,316.00
Reason For Variance:	For Phase 4, we are planning to hire and train new iwers and Vivienne suggested we use a Field Research classification to attract qualified recruits esp in Texas. This category has a hire rate, so we are projecting that.

Projections
May 09, 2022

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	In April, we had a small number of hours projected for Megan and Barb, but only Megan charged hours.

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

Project Team	**HUM#:**	HUM00099822	**Period Of Approval:**
	Project Lead:	Maureen Joan O'Brien	
	Budget Analyst:	Richard Warren Krause	
	Production Manager:	Margaret Lavanger	
	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, Megan Hromco. TSG: Jeff Smith, Brad Goodwin, Vallyn Dall, 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	Blaise 4.8 BIA
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	Apr, 2022 (HCAP 2022)	**Project Phase**	Planning

Risk Level *On Track*

Monthly Update HCAP pre-production is on track for a July 13-15 interviewer training and production start.   The hotel has been selected (Kensington) and the contract will be signed on 4/25. The Iwer/TL/PC/Travel coord posting went up 3 weeks ago and ended last week. We posted for 22 OSers and were only able to get 20.   There will be a 2nd training

in the Fall – shooting for October – with an additional 22 interviewers and we may need to consider New Hires then. Systems development is underway – Blaise coding is starting this week with minor updates. Surveytrak/Weblog/Webtrak are being resurrected from 2020 and will have minor updates. HCAP pre-production is on track for a July 13-15 interviewer training and production start.   The hotel has been selected (Kensington) and secured. We posted for 22 OSer Iwer and were able to get 20.   There will be a 2nd training in the Fall – shooting for October – with an additional 22 interviewers and we may need to consider New Hires then. A posting went up last week for this training so that we can see if we will need to post for New Hires. The IRB Amendment will be submitted this Friday. We are working through materials and text updates for the submission. Systems development is underway – Blaise testing is underway. Surveytrak/Weblog/Webtrak are being resurrected from 2020 and will have minor updates. The WBD (whole blood draw) protocol almost finalized – we will do live scheduling like HRS this wave. We will attempt a blood draw for those selected in HRS, and try one more time if they refused in HRS, or if they said YES and have not gotten the blood draw yet. The Iwer will attempt to schedule for a phlebotomist to come to the R's home at their convenience. Another new itme for 2022 is that Brave Man and Logical Memory will need to be scored/entered on paper and pencil rather than via Blaise due to licensing issues. This will be entered into a Blaise stand-alone app.   The QC plan is being developed – verification items have been identified. Some other items on the radar that are being / will be worked through: Canvas Home Study, 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
May 17, 2022

Total Cost to Date (Direct + Indirect):	223,251.09
Estimated Cost at Completion (E$AC):	4,178,343.45
Total Budget:	4,488,000.00
Variance (Budget minus E$AC):	309,656.55
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
May 17, 2022

Dollars Projected For Month:	50,320.42
Actual Dollars Used:	29,963.05
Variance (Projected minus Actual):	20,357.37
Reason For Variance:	Training support staff did not charge all hours allotted. Hours will be pushed forward.

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 - 06/2022
Data Col Period   05/2021 - 05/2022
Security Plan   NA
Milestone Dates

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

Other Project Team Members:	Technical Leads: Ian Ogden & Jim Rodgers
	MSMS Developers: Pam Swanson & Jim Rodgers
	Data Manager: Laura Yoder
	Project Support 1: Jeannie Baker (Replacing Becky Scherr, as of late-June, 2021)
	Project Support 2: Melissa Luker (Spring Only)
	Project Support 3: Debra Heier (Locating, Spring Only)
	Project Support 4 (RPay & Mailing-Support Only, Spring): Anna Fuqua-Smith
	Project Support 5 (RPay & Mailing-Support Only, Fall): Daniah Buageila
	Production Manager: Pooja Varma-Laughlin (Spring Only)
	Production Manager / Scheduler: Kelley Popielarz (Fall Only)
Other Project Names:	HRS 2021 Off-Year Mail Study
	HRS 2021 OYMS (COVID) / OYMSF
Sample Mgmt Sys	SRov2021a&OMSMailer
Data Col Tool	HRS 2021 Spring COVID Survey / Fall COVID Survey
Hardware	HRSe2021dPespectives on the Pandemic Survey
DE Software	Other (MSMS DCA)
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, prepaid (25.00)
Payment Method	Check through STrak RPay System

Report Period	Apr, 2022 (HRS 2021 OYMS / COVID S	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update

[Production Status]
As of mid-May, we are anticipating an imminent end to data collection, as returns from both the Spring and Fall releases have fallen to very few (2-3 per week, across both releases). It is possible that data collection and logging will wrap before the end of May, unless additional returns come in.

[Data Delivery]
If data collection ends by late-May, final data will be delivered by early-mid June. The SRC-HRS team have confirmed that this revised timeline is acceptable.

Special Issues None.

Cost
May 17, 2022

Total Cost to Date (Direct + Indirect):	1,346,316.56
Estimated Cost at Completion (E$AC):	1,183,323.16
Total Budget:	1,333,924.00
Variance (Budget minus E$AC):	150,600.84
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 ~$150K. Primary drivers are: (1) Lower-than-budgeted RR from the Spring effort; (2) Lower-than-budgeted RR from the Fall effort; (3) $106K in unallocated budget.

Projections
May 17, 2022

Dollars Projected For Month:	-1,133.13
Actual Dollars Used:	3,522.12
Variance (Projected minus Actual):	-4,655.25
Reason For Variance:	Primary Driver: $5,450 in check voids projected to hit in April, but pushed forward to May. Otherwise, both salary and non-salary costs for April, 2022 came in a bit under projections.

Measures

	Units Complete	RR	HPI
Current Goal:	15,700	80.0%	N/A
Goal at Completion:			
Current actual:	11,570	59.2%	
Estimate at Complete:			
Variance:			

Other Measures

Units Completed & RR by Release (as of 5/17/2022):

```
         n, IW  |   RR
Spring | 8,362 |  60.7%
Fall   | 3,208 |  55.8%
```

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 Sims
- **Senior Project Advisor:** Nicole G Kirgis
- **Production Manager:** Deborah Zivan
- **Production Manager:** Jennifer C Arrieta

Proposal #:   no data

Description: The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.

SRO Project Period   01/2021 - 05/2023
Data Col Period   03/2022 - 04/2023
Security Plan   NA
Milestone Dates

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

Other Project Team Members: Derek Dubuque (Production Manager), Theresa Camello (Production Manager), Taghreid Lovell (Production Manager), Deborah Zivan (Project Manager), Andrew Hupp (Project Manager), Kallan Larsen (Project Manager), Gary Hein (Project Manager), Michelle Smith (Project Manager/Training Coordinator), Maureen O' Brien (Training Coordinator), Daniah Buageila (Project Manager), Anna Fuqua-Smith (Project Manager), Janet McBride (Project Assistant), Paul Burton (Stats/Sampling), Vanessa Clarke (Project Assistant), Jeannie Baker (Project Assistant), Melissa Luker (Project Assistant), Anthony Romanowski (Project Manager), Megan Hromco (Project Assistant)
Tech Team: Karl Dinkelmann, Jeff Smith, Jim Rodgers, Laura Yoder, Marsha Skoman, Ashwin Dey, Pam Swanson, David Bolt, Deb Wilson, Jennie Williams, Rose Zybdel, Stephanie Windisch, Heather Schroeder, Holly Ackerman, Shane Empie, Kelly Chatain

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   Apr, 2022 (HRS 2022 Panel)   **Project Phase**   Implementing

Risk Level   *Some Concerns*

Monthly Update   Projected hours and completed interviews were consistently higher than goals throughout the month of April. The project team has been working on production monitoring, IRB submissions, logging, payment and letter request processing, and testing. Technical development has continued with the Blaise instrument, SurveyTrak, Weblog, WebTrak, and reports. Web panel programming and testing in MSMS continued. Early in production, questionnaire and preload issues were identified so HRS staff is work began working on fixes. Datamodel 2 was released in April after which we identified a serious issue with datamodel migration. Karl has been working closely with Jason Ostergren and CBS to identify a fix. Due to this issue, 62 households where at least one respondent in the household had suspended in datamodel 1 have been pulled from the field staff until a fix is implemented.

Special Issues   -Projected overrun
-Blaise 5.10 datamodel migration issues

Cost
May 17, 2022

Total Cost to Date (Direct + Indirect):	4,883,064.30
Estimated Cost at Completion (E$AC):	16,592,206.12
Total Budget:	16,508,390.00
Variance (Budget minus E$AC):	-83,816.12
Reason For Variance:	CRS is 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. CRS is now using the actual Iwer rates for projecting Iwer costs and travel projections were removed from the recruitment task.

Projections
May 17, 2022

Dollars Projected For Month:	1,372,278.10
Actual Dollars Used:	1,242,958.97
Variance (Projected minus Actual):	129,319.13
Reason For Variance:	The hotel invoice for Feb/Mar Prod training has not yet been received (all $431K pushed forward to May), RPay and travel costs were significantly under projections.

Measures

	Units Complete	RR	HPI	
Current Goal:	2543	11.0	7.0	
Goal at Completion:	16,266	74.0%	9.0	
Current actual:	3322	14.4	7.2	
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:	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample.
SRO Project Period	02/2021 - 01/2024
Data Col Period	03/2022 - 01/2024
Security Plan	NA

Milestone Dates

PreProduction Start:		**Pretest Start:**	
Pretest End:		**Recruitment Start:**	
Staffing Completed:		**GIT Start:**	
SS Train Start:		**SS Train End:**	
DC Start:	04/19/2022	**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	Apr, 2022 (HRS2022-Screening) **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	The PI signed off on the sample design on 2/21. The sampling team selected the fresh sample. The selections were given to Data Ops to assign SIDs. DataForce prepared and assembled the invitation mailing for the Release 1 web cases. They will hold the mailing until everything has been signed off in testing. Andrew and Eva met with the PI and the Sampling team to discuss the Pre-Id EGENX and Pre-Id MOC sample. A meeting is scheduled for May after Sunghee returns to discuss the pre-ID cases, the work Sampling needs to do (i.e., select cases) and how/when they should be released.

A second training (mainly of on-staffers) is planned for late summer. A third training of (mainly of new hires) is planned for later Sept/early October. There will be follow-up of screening procedures (part refresher/ part new content (e.g. Type I and Type II updated))on team calls the week of May 9.

Web production launched on Tuesday, April 19. A proposal was put forth by SRO to release the field sample earlier than planned (by 2 weeks). This was done to 1) get screening started in the field, 2) to take advantage of the extra daylight, and 3) get data needed to determine staffing needs for the fall training.

IRB: Nothing new in April. Screening will have some generic letters to submit in May/June.

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

The team finalized the documentation for how half-open interval (Type I) updates and Type II updates will be handled in the field. That documentation was used as the basis for training on this topic prior to the start of field screening. Andrew updated the SurveyTrak specs with how this will be operationalized and signed-off on the implementation.

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. Andrew and Raphael worked out the result code issue. There will be an additional discussion about the rates on the FPR.

The team worked on some updates to procedures, documentation, etc. based on feedback from training.

Andrew and Eva worked on the screening goals and sample release plan. This will be updated as we see how screening production starts off.

Special Issues

Cost
May 10, 2022

Total Cost to Date (Direct + Indirect):	2,857,296.30
Estimated Cost at Completion (E$AC):	24,566,484.27
Total Budget:	24,277,856.00
Variance (Budget minus E$AC):	-228,628.27
Reason For Variance:	The projected overrun increased in April (~$120,000) due to projection updates.

Projections
May 10, 2022

Dollars Projected For Month:	978,099.05
Actual Dollars Used:	261,495.63
Variance (Projected minus Actual):	716,603.42
Reason For Variance:	--Staff hours in April were lower than projections by 60%...and hosting and respondent incentive costs were lower than projected.

Measures

	Units Complete	RR	HPI
Current Goal:	24,000/5,000		3.0
Goal at Completion:			
Current actual:	100/2		NA
Estimate at Complete:			
Variance:			

Other Measures

Project Name	(HRS-Neuro) HRS Neuroimaging Pilot
Project Mode	Primary: Telephone Secondary: Face to Face Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 169,363.00 **InDirect Budget:** 16,938.00 **Total Budget:** 186,301.00

Principal Investigator/Client	Professor Kenneth Langa, MD, Ph.D (UM SRC-HRS) Professor Michael Weiner, MD (University of California, San Francisco) Professor David Weir, Ph.D (UM SRC-HRS)
Funding Agency	Alzheimer's Association
IRB	**HUM#:** HUM00142251 **Period Of Approval:** 04/2018-11/2021
Project Team	**Project Lead:** Ian Ogden
	Budget Analyst: Richard Warren Krause
	Production Manager: Veronica Connors-Burge
	Senior Project Advisor: Evanthia Leissou
	Production Manager: Ian Ogden
	Production Manager:

Proposal #:	no data
Description:	[Updated 5/2022] This pilot study will invite HRS-HCAP respondents to undergo medical imaging at one of three selected sites within the continental United States. SRO's role in the pilot is to call HRS/HCAP respondents to ask if they are willing to be contacted by an imaging site team in their region. Respondent contact information will be passed to the appropriate site coordinator for eligibility determination, scheduling of the tests, arrangement of transportation, and completion of the scans. SRO will process a token of appreciation for each respondent and monitor production across the three imaging sites. As of March 14, 2020 all field data collection was halted due to COVID-19; as of July, 2020 all ongoing project maintenance was halted and the project deactivated. As of December, 2020, re-launch is not anticipated before fall, 2021 and the project will be deactivated until any re-launch planning resumes. On April 20, 2022, the SRC-HRS team made the decision not to relaunch the Neuroimaging project. Key reasons are documented in the final monthly update.
SRO Project Period	01/2018 - 06/2022
Data Col Period	03/2019 - 05/2022
Security Plan	NA

Milestone Dates

PreProduction Start:	01/15/2018	**Pretest Start:**	
Pretest End:		**Recruitment Start:**	
Staffing Completed:		**GIT Start:**	
SS Train Start:	03/20/2019	**SS Train End:**	03/20/2019
DC Start:	03/25/2019	**DC End:**	05/31/2022

Other Project Team Members:	[TSG] Technical Lead: Pamela Swanson [TSG] Programmer: Ashwin Dey [TSG] Data Manager: Matthew Scibiorski [TSG] Blaise Programmer: Jim Hagerman [DCO] Production Manager: Veronica Connors-Burge [DCO] Field TL: 1 [DCO] Field Interviewers: (n=3, one of whom is bilingual)

Other Project Names:	HRS Neuroimaging Study
	HCAP Neuroimaging Pilot
Sample Mgmt Sys	SurveyTrak; Project specific system (Web Logging for Site Sample Management)
Data Col Tool	Blaise 4.8
Hardware	Laptop; Other (Optional Laptop for External Site Teams)
DE Software	Other (Web Logging for Site Data-Entry); N/A
QC Recording Tool	NA
Incentive	Yes, R; Yes, Other (Travel Expenses (processed and issued by imaging sites))
Administration	SRO Group; Other (Imaging Site Teams (travel expenses only))
Payment Type	Check, post ($200.00)
Payment Method	Check through STrak RPay System

Report Period	Apr, 2022 (HRS-Neuro) **Project Phase** Closing
Risk Level	*On Track*
Monthly Update	This is the first monthly update in 14 months, as the project was put on hold in March, 2020 due to the COVID-19 pandemic and a decision regarding whether to relaunch the project was made in April, 2022.

On April 20, 2022, Ken wrote to the imaging site teams, as well as to SRO to share that a decision was made not to restart the study to continue working toward completing imaging with 73 additional participants.

The primary reasons shared were:
(1) Anticipated difficulty in answering the main scientific question of whether a more representative sample can be recruited to undergo imaging in an ongoing cohort;
(2) The new (and unclear) impact of "COVID hesitation" to visit an imaging facility; and
(3) Resource limitations, given other current and upcoming HRS priorities (e.g. HRS 2022, including screening of a new cohort, HCAP 2022).

Subsequently, the SRO team has moved to clear placeholder projections which had been on file since 2020, and will be closing out the project in May, 2022. At this time, further costs are not anticipated after May, 2022. |
| **Special Issues** | (1) Ensuring appropriate archiving of data, projects and files (particulary items stored on the SRO sFTP and the former M+Box directory (migrated to DropBox in mid-2021)). |

Cost **May 09, 2022**		
Total Cost to Date (Direct + Indirect):	180,443.10	
Estimated Cost at Completion (E$AC):	181,968.53	
Total Budget:	186,301.00	
Variance (Budget minus E$AC):	4,332.47	
Reason For Variance:	Per a decision from SRC-HRS on 4/20/2022, the Neuroimaging Pilot will not relaunch following its hiatus beginning in March, 2022. Effectively all remaining projections on the project have been cleared, and what was previously a projected overrun of ~$40K (assuming that the budget (and project in general) would need review if the effort were to relaunch) is now a small underrun of ~$4K.	

Projections **May 09, 2022**		
Dollars Projected For Month:	0.00	
Actual Dollars Used:	0.00	
Variance (Projected minus Actual):	0.00	
Reason For Variance:	N/A - no costs projected in April, 2022 and no salary/non-salary/indirect costs were charged.	

Measures

	Units Complete	RR	HPI
Current Goal:	105	50%	1.0
Goal at Completion:	N/A	N/A	N/A
Current actual:	32	19.2%	TBD
Estimate at Complete:	32	19.2%	TBD
Variance:	--	--	--

Other Measures

Project Name	(IHDS3) India Human Development Survey Wave 3
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects

Project Status Current

Budget	***Direct Budget:*** 358,900.61 ***InDirect Budget:*** 200,983.92 ***Total Budget:*** 559,884.53
Principal Investigator/Client	Sonalde Desai (University of Maryland) Stephanie Chardoul (University of Michigan) Santanu Pramanik (National Council of Applied Economic Research)
Funding Agency	National Institutes of Health, Department of Health and Human Services
IRB	***HUM#:*** ***Period Of Approval:***
Project Team	***Project Lead:*** Gina-Qian Yang Cheung ***Budget Analyst:*** Ryan Neice ***Production Manager:*** ***Senior Project Advisor:*** Stephanie A Chardoul ***Production Manager:*** Sarah Elisa Broumand ***Production Manager:*** Jennifer M Kelley
Proposal #:	no data
Description:	The India Human Development Survey (IHDS) is a nationally representative, multi-topic, longitudinal survey of 41,554 households in 1503 villages and 971 urban neighborhoods across India. The first round of interviews were completed in 2004-5; data are publicly available through ICPSR. A second round of IHDS reinterviewed most of these households in 2011-12 (N=42,152). SRC joins IHDS Wave 3 to automate data collection, the scope of work includes methodological design, sample design, questionnaire design, technical instrument design, supervisor/interviewer training, production monitoring, quality control, data dissemination, and 2-3 weekly conference calls for capacity building.
SRO Project Period	01/2019 - 03/2024
Data Col Period	05/2022 - 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:

Project Management Team
Stephanie Chardoul -- Senior Project Advisor (SPA)
Gina Cheung - Lead Project Manager and Tech Lead
Sarah Broumand - Project Manager
Jennifer Kelley - Project Manager

Programming Team
Collette Keyser - Blaise
Marsha Skoman - SurveyTrak
Holly Ackerman - WebTrak
Cheng Zhou - Sync

HelpDesk Team
Emmanuel Ellis
John

Data Manager Team
Sarah E
Jennie

Other Project Names:

Sample Mgmt Sys	Other (SurveyTrak INTL)
Data Col Tool	Blaise 5
Hardware	Laptop; Other (NCAER Phone (In India))
DE Software	Other (TBD)
QC Recording Tool	DRI-CARI
Incentive	Yes, Other (TBD)
Administration	Other (TBD)
Payment Type	Other (TBD)
Payment Method	Other (TBD)

Report Period	Apr, 2022 (IHDS3)	**Project Phase**	Implementing
Risk Level	On Track		
Monthly Update	Start the production in May for two projects HH and Community		
Special Issues			

Cost
May 18, 2022

Total Cost to Date (Direct + Indirect):	354,476.75
Estimated Cost at Completion (E$AC):	394,375.68
Total Budget:	559,884.53
Variance (Budget minus E$AC):	165,508.85
Reason For Variance:	We need to update the projection

Projections
May 18, 2022

Dollars Projected For Month:	30,523.38
Actual Dollars Used:	35,939.20
Variance (Projected minus Actual):	-5,415.82
Reason For Variance:	Projection needs to be updated

Measures

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

Other Measures

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

IRB

HUM#:	NA	***Period Of Approval:***

Project Team

Project Lead:	Margaret Lee Hudson
Budget Analyst:	Richard Warren Krause
Production Manager:	
Senior Project Advisor:	Evanthia Leissou
Production Manager:	Kasyera Kowalczyk
Production Manager:	

Proposal #:   no data

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

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

Milestone Dates

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

Other Project Team Members:

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

Other Project Names:

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

Report Period	Apr, 2022 (MARS 2)	**Project Phase**	Closing

Risk Level On Track

Monthly Update The month of April was spent doing final close out for the project, including regular meetings between the SRO team (data manager + project manager) and the SWRC project team to discuss specific cases that came up through data manager QC steps and work on resolution steps. All cases were finalized and with final result code and call note. The data manager cleaned up data and documented issues in the "problem database". We reached out to HelpDesk for a suggestion on how to handle wiping all data from the laptops; SWRC will not use them again due to their age. A final dataset was delivered in late April for the SWRC team to review and sign off on. Finally, we worked with LihShwu to resolve and issue related to SWRC accessing Wave 1 data.

A few final close out tasks will happen in May, with a final project review scheduled in June.

Special Issues

Cost
May 17, 2022

Total Cost to Date (Direct + Indirect):	240,746.19
Estimated Cost at Completion (E$AC):	240,746.19
Total Budget:	254,702.00
Variance (Budget minus E$AC):	13,955.81
Reason For Variance:	Variance due to lack of international travel at the onset of the study. Some of this budget was used to support extended data collection due to pandemic-related slowness in production.

Projections
May 17, 2022

Dollars Projected For Month:	6,481.91
Actual Dollars Used:	4,635.79
Variance (Projected minus Actual):	1,846.12
Reason For Variance:	No HelpDesk hours were charged and data manager hours for close out were fewer than needed. However, some hours will be pushed for a few close out tasks in May.

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

Project Team	*HUM#:* HUM00181068	*Period Of Approval:*	Exempt
	Project Lead:	Terri Ann Ridenour	
	Budget Analyst:	William Lokers	
	Production Manager:	Ruth B Philippou	
	Senior Project Advisor:	Nicole G Kirgis	
	Production Manager:		
	Production Manager:		

Proposal #:   no data

Description: MI CReSS is a partnership between the University of Michigan School of Public Health (SPH) and the Michigan Department of Health and Human Services. It is a public health surveillance study to learn about Michiganders' experiences with COVID-19 using a representative sample of confirmed cases within the state. Using survey data, they plan to document sociodemographic inequities in COVID-19 testing, treatment, and recovery.

SRO's involvement includes the administration of a Follow-up survey for respondents that completed a Baseline survey with the SPH team. Based on the sample information provided, we will be re-contacting approximately 3,995 respondents who have already completed (or are estimated) to complete the Baseline survey to administer the Follow-up survey.

The Follow-up survey is estimated to be 45 minutes in length, and Respondents will be encouraged to complete the survey by web. However, SRO Interviewers will contact non-responders and conduct the interview over the telephone if the Respondents do not want to complete the survey on the web.

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

Milestone Dates

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

Other Project Team Members:
Bill Lokers: Financial Analyst
Megan Hromco: Production Assistant
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	Apr, 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 Iwers/TL. We just staffed 3 new interviewers and are delivering two trainings this week.

The PI and team delivered more, minor updates to the instrument last week that do not require structural changes. We successfully released sample replicate 3 and 4, in addition to the updated data model.

Special Issues

Duplicate gift cards issued for 62 cases (@2 x $50) due to system error. Bill has asked Ryan if this cost may be covered by overhead. Waiting for response.

Cost
May 06, 2022

Total Cost to Date (Direct + Indirect):	268,408.86
Estimated Cost at Completion (E$AC):	443,965.54
Total Budget:	429,680.00
Variance (Budget minus E$AC):	-14,285.54
Reason For Variance:	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
May 06, 2022

Dollars Projected For Month:	37,756.24
Actual Dollars Used:	39,810.70
Variance (Projected minus Actual):	-2,054.46
Reason For Variance:	We had more interviewer hours than what we had projected for the month.

Measures

	Units Complete	RR	HPI
Current Goal:	1,157 (Rel 1-3)	80% (60%-Web/40%Tel)	2.25
Goal at Completion:		80% (60%-Web/40%Tel)	
Current actual:	787	67% (59%-Web/41% Tel	3.79
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 2022_27) Monitoring the Future Base Year 2022-2027
Project Mode	Primary: Class SAQ Total of Modes: 1
Project Type	Sponsored Projects

Project Status Current

Budget	*Direct Budget:*	6,267,988.00	*InDirect Budget:*	3,510,072.00	*Total Budget:* 9,778,060.00

Principal Investigator/Client   Richard Miech (SRC)

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

IRB   *HUM#:*   00217920   *Period Of Approval:*   pending

Project Team
Project Lead: Rebecca Gatward
Budget Analyst: Dean E Stevens
Production Manager: Margaret Lavanger
Senior Project Advisor: Gregg Peterson
Production Manager: James Koopman
Production Manager:

Proposal #:   no data

Description: Since 1975 the MTF survey has measured drug and alcohol use and related attitudes among adolescent students nationwide. A nationally representative sample of survey participants report their drug use behaviors across three time periods: lifetime, past year, and past month. The survey is funded by the NIDA, a component of the National Institutes of Health (NIH), and conducted by the University of Michigan.
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. Proctors (SRO interviewers) coordinate and administer the data collection in schools (either FTF or remotely without visiting the schools).
(b) panels of high school graduates aged 19-30, 35, 40,45, 50, 55, and 60 (now primarily surveyed by web). Panel members aged 19-30 are invited to participate 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. Press releases and published results can be found here.. http://www.monitoringthefuture.org/

SRO Project Period   04/2022 - 03/2027
Data Col Period   04/2022 - 03/2027
Security Plan   Yes
Milestone Dates

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

Other Project Team Members:

Hueichun Peng	Technical Lead (WebSMS programmer)
Brad Goodwin	Data Management (Minako is providing support)
Ashwin Dey	SurveyTrak, WebTrak and MTF specific Apps. Programmer
Kyle Goodman and Deborah Wilson	Help Desk/Tablet support

Other Project Names:
Sample Mgmt Sys   SurveyTrak; Web SMS; Illume
Data Col Tool   Illume
Hardware   Laptop; Tablet; [UM cell] Phone
DE Software   Illume
QC Recording Tool   N/A
Incentive   Yes, Other (Honorarium paid to school by MTF Research staff)
   Administration   ISR Group
   Payment Type   NA
   Payment Method   Check through other system

- -

Report Period	Apr, 2022 (MTF Base Year 2022_27)	**Project Phase**	Implementing

Risk Level   *On Track*

Monthly Update

April 2022
Survey administrations completed in April - 92, 57 were 8/10th grade students and 35 12th grade students. An interviewer was present at 48 of these schools (the remainder were remote survey administrations, which means that the interviewer did not visit the school).
Hours per survey administration = 14.6.
As of 5/20 - surveys completed by 27,806 students across 264 schools - 80% RR.
Number of schools recruited (by MTF Research Team) lower than in pre pandemic years. This year 349 schools were passed to SRO interviewers to complete the survey administration. In previous years (for example, 2020), survey administrations were completed in around 400 schools.

Special Issues

Cost
May 18, 2022

Total Cost to Date (Direct + Indirect):	9,778,060.00
Estimated Cost at Completion (E$AC):	9,025,766.58
Total Budget:	9,778,060.00
Variance (Budget minus E$AC):	752,293.42
Reason For Variance:	The underspend is based on a first version of projections for the new five year funding period. We will work on refining these based on outcomes from this year (the first with remote and FTF survey administrations). The PG funding amount etc. was not received unto end April and then short codes had to be requested.

Projections
May 18, 2022

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	Hours are still being moved from old to the new short codes - we do not have an actual $ report for April yet.

Measures

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

Other Measures

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

Project Status Current

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

Principal Investigator/Client	Megan Patrick (University of Michigan)
Funding Agency	

IRB *HUM#:* 00159183 *Period Of Approval:* 2/2/2022

Project Team
Project Lead: Donnalee Ann Grey-Farquharson
Budget Analyst: Parina Kamdar
Production Manager: Hongyu Johnson
Senior Project Advisor: Kirsten Haakan Alcser
Production Manager:
Production Manager:

Proposal #: no data

Description: 2022 will be Wave 4 Data Collection.

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

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

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

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

Report Period	Apr, 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:
- The system has been stable since we resolved the mobile application issues
- continue to monitor during the data collection

Data Collection - Production ended in April 2022.
As of 3/31/2022: Annual Survey 1108 cases: 737 completes (66.52%), 90% completed Diary 1, 86% completed Diary 2, 82% completed Diary 3, 82% completed Diary 4, 82% completed Diary 5,81% completed Diary 6, 79% completed Diary 7, 79% completed Diary 8, 76% completed Diary 9, 75% completed 10, 77% completed Diary 11, 78% completed Diary 12, 74% completed Diary 13, and 72% completed Diary 14.

Special Issues

Cost
Apr 30, 2022

Total Cost to Date (Direct + Indirect):	317,201.39
Estimated Cost at Completion (E$AC):	348,620.94
Total Budget:	468,982.00
Variance (Budget minus E$AC):	125,241.43
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 May,2022.

Projections
Apr 30, 2022

Dollars Projected For Month:	15,082.65
Actual Dollars Used:	11,346.32
Variance (Projected minus Actual):	3,736.33
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 May,2022

Measures

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

Other Measures

Project Name	(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects

Project Status Current

Budget	*Direct Budget:*	2,496,935.00	*InDirect Budget:*	1,398,282.00	*Total Budget:* 3,895,217.00

Principal Investigator/Client
John Schulenberg (UM-SRC)
Megan Patrick (UM-SRC)

Funding Agency

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

Project Team
Project Lead: Donnalee Ann Grey-Farquharson
Budget Analyst: Dean E Stevens
Production Manager: Lloyd Fate Hemingway
Senior Project Advisor: Rebecca Gatward
Production Manager:
Production Manager:

Proposal #: no data

Description: This project is a continuation of MTF Illume Web 2021.

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

SRO Project Period 01/2022 - 03/2027
Data Col Period 04/2022 - 10/2026
Security Plan NA
Milestone Dates

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

Other Project Team Members: Rebecca Gatward (SPA), Donnalee Grey-Farquharson, Lloyd Hemingway, Hueichun Peng, Shaowei Sun, Peter Sparks, Ashwin Dey, Hongyu Johnson, Minako Edgar, Brad Goodwin

Other Project Names: MTF

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 Apr, 2022 (MTF Panel 2022-27)   **Project Phase**   Initiation

Risk Level *On Track*

Monthly Update Management
- Worked with MTF research team on testing the survey instrument
- updated the project timeline

System
- prepared SMS for testing and production
- prepared RLM for production

Data Collection
- Production started in April.
Total Sample: 17708. As of 04/30/2022:
Web: 2956 (16.69%), Partial: 170 (0.96%), SAQ: 6 (0.03%)

Special Issues

Cost
Apr 30, 2022

Total Cost to Date (Direct + Indirect):	0.00
Estimated Cost at Completion (E$AC):	4,072,530.09
Total Budget:	3,895,217.00
Variance (Budget minus E$AC):	-177,313.09
Reason For Variance:	We are in the transition from hardship account to the official account. The total project amount includes MTF Web Illume as well as Non-Response Calling and Winter Location project. We will make the adjustment in May 2022.

Projections
Apr 30, 2022

Dollars Projected For Month:	36,032.48
Actual Dollars Used:	41,495.48
Variance (Projected minus Actual):	-5,463.00
Reason For Variance:	We are in the transition from hardship account to the official account. The total project amount includes MTF Web Illume as well as Non-Response Calling and Winter Location project. The overrun amount is MTF Panel 2022-2027 that was the combination of MTF Panel 2017-2022 and MTF Web Illume. We will make the adjustment in May 2022.

Measures

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

Other Measures

Project Name	(PSID21) Panel Study of Income Dynamics 2021
Project Mode	Primary: Telephone Secondary: Web Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 4,447,019.00 **InDirect Budget:** 2,440,404.00 **Total Budget:** 6,887,423.00

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

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

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

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

Proposal #:   no data

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

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

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

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

SRO Project Period   04/2020 - 04/2022
Data Col Period   03/2001 - 10/2021
Security Plan   NA
Milestone Dates

PreProduction Start:	04/01/2020	**Pretest Start:**	09/28/2020
Pretest End:	10/25/2020	**Recruitment Start:**	10/15/2020
Staffing Completed:	12/02/2020	**GIT Start:**	
SS Train Start:	02/24/2021	**SS Train End:**	03/05/2021
DC Start:	03/18/2021	**DC End:**	12/31/2021

Other Project Team Members:

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

- -

Report Period	Apr, 2022 (PSID21)	**Project Phase**	Closing

Risk Level — *On Track*

Monthly Update — April work was limited to cost monitoring and a small amount of data manager work. The limited final systems close out activities projected for TSG DM in May have now been moved to June due to TSG vacations. This has led to some additional costs to keep the project open one final month.

Special Issues

Cost
May 17, 2022

Total Cost to Date (Direct + Indirect):	7,292,287.80
Estimated Cost at Completion (E$AC):	7,296,018.44
Total Budget:	6,887,423.00
Variance (Budget minus E$AC):	-408,595.44
Reason For Variance:	Our total, projected overrun decreased by $3,116.35 from March to April.

Projections
May 17, 2022

Dollars Projected For Month:	5,167.25
Actual Dollars Used:	-265.08
Variance (Projected minus Actual):	5,432.33
Reason For Variance:	We had projected to spend ~$3K direct cost, but actually had a total credit for the month of $24. This is because most SRO staff that are still working on the project ended up coming in under projections, and both help desk and interviewer hour corrections posted in April when we had projected them to hit in May. Megan has now removed the May correction in projections.

Measures

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

Other Measures — Dates and Productions stats did not change for the April MPR.

Project Name	(PSID23 Online Contact Update) Panel Study of Income Dynamics 2023 Online Contact Update
Project Mode	Primary: Web Total of Modes: 1
Project Type	Sponsored Projects **Project Status** Current

Budget   **Direct Budget:**   47,456.00   **InDirect Budget:**   26,575.00   **Total Budget:**   74,031.00

Principal Investigator/Client   Katherine McGonagle (PSID)

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:**   3/22/22-3/21/23

Project Team

Project Lead:	Camila Kendall
Budget Analyst:	Megan Gomez-Mesquita
Production Manager:	
Senior Project Advisor:	Stephanie A Chardoul
Production Manager:	
Production Manager:	

Proposal #:   no data

Description: SRO will write technical specifications, program and test a Blaise 5 web instrument and web portal with authentication that will allow PSID and TAS respondents to confirm or update their contact information via an online survey. SRO will provide PSID will authenticated QR codes that will be embedded in a mailing sent to respondents. SRO will also send the respondents one email reminder with an authenticated link.

SRO Project Period   04/2022 - 12/2022
Data Col Period   06/2022 - 12/2022
Security Plan   NA

Milestone Dates

PreProduction Start:	04/01/2022	**Pretest Start:**	
Pretest End:		**Recruitment Start:**	
Staffing Completed:		**GIT Start:**	
SS Train Start:		**SS Train End:**	
DC Start:	07/01/2022	**DC End:**	11/30/2022

Other Project Team Members:
Rachel Orlowski -- PSID Lead
Karl Dinkelmann -- TSG Lead and Blaise Programming Support
Marsha Skoman -- Blaise Programmer
Daric Thorne -- MSMS Spec Lead
Kyle Goodman -- MSMS Set up Programmer
Jim Rodgers -- MSMS Lead
Rose Zybel -- Data Manager

Other Project Names:

Sample Mgmt Sys	MSMS
Data Col Tool	Blaise 5
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, R
Administration	ISR Group (PSID)
Payment Type	Check, post ($10); Other (electronic, post--JP Morgan)
Payment Method	Check through other system (PSID staff will handle check & e-payment via RAPS)

Report Period   Apr, 2022 (PSID23 Online Contact Upd   **Project Phase**   Initiation

Risk Level   *On Track*

Monthly Update   Project kicked off in April. Weekly tech team meetings began on April 19th. Biweekly PI meetings began in April. MSMS spec development is underway. Blaise 5 Web instrument will be based on existing PSID/TAS web instrument RPay section. Revisions of Blaise specs on-going.

Communication plan: Biweekly meetings with client, and biweekly email updates (weeks we don't meet).

Upcoming priorities: QR code generation, drafting email templates, and testing web instrument.

Special Issues

Overrun mainly due to Blaise programmer charging in ET more future time than actually worked. These hours will be adjusted down to the actual hours that were worked during April.

Cost
May 06, 2022

Total Cost to Date (Direct + Indirect):	4,448.79
Estimated Cost at Completion (E$AC):	48,832.17
Total Budget:	74,031.00
Variance (Budget minus E$AC):	25,198.83
Reason For Variance:	Actual programming hours charged for April were higher than projections.

Projections
May 06, 2022

Dollars Projected For Month:	3,463.11
Actual Dollars Used:	4,448.79
Variance (Projected minus Actual):	-985.68
Reason For Variance:	Actual programming hours charged for April were higher than projections.

Measures

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

Other Measures

Project Name	(PSID-PR) Puerto Rico Panel Study of Income Dynamics
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 2

Project Type	Sponsored Projects		Project Status	Current

Budget	Direct Budget:	828,395.00	InDirect Budget:	463,899.00	Total Budget:	1,292,294.00

Principal Investigator/Client	Narayan Sastry (University of Michigan)
	Elizabeth Fussel (Brown University)

Funding Agency	NICHD, with supplemental funding being sought from NIA

IRB	HUM#:	HUM00197300	Period Of Approval:	4/5/2022-4/4/2023

Project Team	Project Lead:	Shonda R Kruger-Ndiaye
	Budget Analyst:	Megan Gomez-Mesquita
	Production Manager:	
	Senior Project Advisor:	Stephanie A Chardoul
	Production Manager:	Camila Kendall
	Production Manager:	

Proposal #:	no data

Description: SRO will work with the PIs and a local survey firm in Puerto Rico, Estudios Técnicos (ETI), to develop a sample frame, sample design, questionnaire and data collection protocols for both pilot data collection (in 2022) and baseline data collection (in 2023). DMSS will provide assistance with sample design and implementation, responsive design, panel maintenance issues, and creation of sample weights. SRO will update the PSID-21 Spanish instrument for use specifically in PR. SRO will assist with the preparation of training materials for Listing training, Pretest and Main Data collection and will travel to PR to be on-site for these trainings. SRO will define reports for production and quality control monitoring that will be programmed through the SurveyTrak system, and train the research team on using these reports. All data will be collected by ETI's interviewers in PR and will be encrypted and transmitted daily via SurveyTrak to a secure SRC server. SRO will also assist with data processing.

SRO Project Period	01/2022 - 12/2023
Data Col Period	
Security Plan	NA

Milestone Dates

PreProduction Start:	10/01/2021	Pretest Start:	
Pretest End:		Recruitment Start:	
Staffing Completed:		GIT Start:	
SS Train Start:		SS Train End:	
DC Start:		DC End:	12/31/2023

Other Project Team Members:	DMSS team -- Raphael Nishimura and Minako Edgar
Other Project Names:	
Sample Mgmt Sys	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop
DE Software	N/A
QC Recording Tool	Camtasia
Incentive	Yes, R; Yes, INF
Administration	Other (ETI (Puerto Rican Survey Firm))
Payment Type	Check, post (Varies by study phase); Cash, post (Varies by study phase)
Payment Method	Other (Via ETI Systems)

- -

Report Period	Apr, 2022 (PSID-PR)	Project Phase	Initiation

Risk Level   On Track

Monthly Update   PSID-PR finalized a cost-sharing agreement for sample design and listing scope with the PR-POP study. DMSS, PSID-PR and PR-POP finalized sample design and began procurement process for address data from Regrid and Luma Energy. DMSS constructed the PSUs. SRO started looking into options for incorporating GPS coordinates into Listing and Main Data Collection.

SRO and ETI (Puerto Rican collaborators) worked on rebudgeting NICHD scope and collaborating on budgets to seek additional NIA funding to add scope to the 2023 wave, and add a 2024 HCAP-like study, and a 2025 wave.

Special Issues Poor address data across the island creates challenges for both Listers and Main data collection interviewers. Both will need to rely on GPS coordinates. Our collaborations with PR-POP and ETI also pose some risk and complexity.

Cost
May 11, 2022

Total Cost to Date (Direct + Indirect):	19,869.31
Estimated Cost at Completion (E$AC):	0.00
Total Budget:	1,292,294.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	Total cost to date reflects all charges to the project starting in October 2021. Budget and projections are note yet entered as the rebudget is pending approval.

Projections
May 11, 2022

Dollars Projected For Month:	0.00
Actual Dollars Used:	19,869.31
Variance (Projected minus Actual):	-19,869.31
Reason For Variance:	No projections in CRS to date -- Rebudget is pending PI approval. Costs reported for April reflect all SRO costs to-date.

Measures

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

Other Measures

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

Project Status   Current

Budget	**Direct Budget:** 1,251,758.00	**InDirect Budget:** 0.00	**Total Budget:** 1,251,758.00

Principal Investigator/Client	Joanne Hsu (SCA) Tuba Suzer-Gurtekin (SCA)
Funding Agency	
IRB	*HUM#:* *Period Of Approval:*

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

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

Milestone Dates

PreProduction Start:	*Pretest Start:*
Pretest End:	*Recruitment Start:*
Staffing Completed:	*GIT Start:*
SS Train Start:	*SS Train End:*
DC Start: 12/27/2021	*DC End:* 12/20/2022

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

Report Period	Apr, 2022 (SCA 2022)

Project Phase   Initiation

Risk Level	*On Track*
Monthly Update	SCA APR22 began as scheduled on WED MAR 23, and ended as scheduled on MON APR 25. We completed 600 (320/180/100) IWs for the month (exactly meeting the monthly goals) - at a cumulative HPI of 2.84 (0.16 below the budgeted goal of 3.0).

Special Issues

Cost
May 06, 2022

Total Cost to Date (Direct + Indirect):	387,014.50
Estimated Cost at Completion (E$AC):	1,219,554.75
Total Budget:	1,251,758.00
Variance (Budget minus E$AC):	32,203.25
Reason For Variance:	Reduced hpi

Projections
May 06, 2022

Dollars Projected For Month:	100,042.95
Actual Dollars Used:	90,701.77
Variance (Projected minus Actual):	9,341.18
Reason For Variance:	Reduced hpi

Measures

	Units Complete	RR	HPI
Current Goal:	600		3.0
Goal at Completion:	600		3.0
Current actual:	600		2.84
Estimate at Complete:	600		2.84
Variance:	0		-0.16

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:** 0.00   **Total Budget:** 126,000.00

Principal Investigator/Client
John Callewaert, PI (SRC, Graham Sustainability Institute)
Robert Marans, Co-PI (SRC)
Noah Webster, Co-PI (SRC)

Funding Agency

IRB   **HUM#:**   HUM00204955   **Period Of Approval:**   9/2021-9/2026

Project Team   **Project Lead:**   Maureen Joan O'Brien
Budget Analyst: Carl S Remmert
Production Manager:
Senior Project Advisor: Andrew L Hupp
Production Manager:
Production Manager:

Proposal #:   no data

Description: The overall goal Sustainability Cultural Indicators Project (SCIP), a joint project of the Institute for Social Research (ISR) and the Graham Environmental Sustainability Institute (Graham), is to measure changes in sustainability and carbon-neutrality related knowledge, commitments, and practices in the University of Michigan (U-M) community over time. The principle component of SCIP is a large-scale annual survey, to be conducted with U-M students, faculty, and staff from all U-M Campuses: Ann Arbor, Flint, and Dearborn.

SRO Project Period   09/2021 - 09/2026
Data Col Period   10/2021 - 12/2021
Security Plan   NA
Milestone Dates

PreProduction Start: 08/15/2021		**Pretest Start:**	
Pretest End:		**Recruitment Start:**	
Staffing Completed:		**GIT Start:**	
SS Train Start:		**SS Train End:**	
DC Start: 10/13/2021		**DC End:** 12/15/2021	

Other Project Team Members: Maureen O'Brien - Project Lead, application programming, sample loading, questionnaire distribution
Minako Edgar - Sample prep, data management, data delivery, GIS analysis
Raphael Nishimura - Weighting
Carl Remmert - budget support analyses

Other Project Names:
Sample Mgmt Sys   Project specific system (Qualtrics)
Data Col Tool   Other (Qualtrics)
Hardware   NA
DE Software   N/A
QC Recording Tool   N/A
Incentive   Yes, R
Administration   NA
Payment Type   Other (Amazon)
Payment Method   Other (via Email)

- -

Report Period   Apr, 2022 (SCIP 2021)   **Project Phase**   Closing

Risk Level   *On Track*

Monthly Update   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
May 17, 2022

Total Cost to Date (Direct + Indirect):	65,900.07
Estimated Cost at Completion (E$AC):	74,194.67
Total Budget:	126,000.00
Variance (Budget minus E$AC):	51,805.33
Reason For Variance:	52k has been transferred back to the PI's due to overfunding, but this does not currently show on the cost report.

Projections
May 17, 2022

Dollars Projected For Month:	7,090.44
Actual Dollars Used:	5,488.11
Variance (Projected minus Actual):	1,602.33
Reason For Variance:	Staff did not charge all hours.

Measures

	Units Complete	RR	HPI
Current Goal:	6,860	27%	
Goal at Completion:	6,860		
Current actual:	6,856	27%	
Estimate at Complete:	6,860		
Variance:			

Other Measures

Project Name	(SSRC Web Survey) Social Science Research Council Web Survey
Project Mode	Primary: Web Total of Modes: 1
Project Type	Sponsored Projects

Project Status   Current

Budget	*Direct Budget:* 11,640.00	*InDirect Budget:* 0.00	*Total Budget:* 11,640.00

Principal Investigator/Client	Anna Harvey (SSRC) Stephanie Chardoul (SRO)
Funding Agency	SSRC
IRB	*HUM#:* HUM00214009 *Period Of Approval:* 3/1/2022-3/1/2023
Project Team	*Project Lead:* Karin Schneider *Budget Analyst:* Carl S Remmert *Production Manager:* *Senior Project Advisor:* *Production Manager:* *Production Manager:*
Proposal #:	no data
Description:	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.
SRO Project Period	03/2022 - 06/2022
Data Col Period	04/2022 - 04/2022
Security Plan	NA

Milestone Dates

PreProduction Start: 03/21/2022		*Pretest Start:*	
Pretest End:		*Recruitment Start:*	
Staffing Completed:		*GIT Start:*	
SS Train Start:		*SS Train End:*	
DC Start: 03/30/2022		*DC End:* 04/12/2022	

Other Project Team Members:	Grad student Mark Nathin is assisting on project.
Other Project Names:	
Sample Mgmt Sys	Other (Qualtrics)
Data Col Tool	Other (Qualtrics)
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	Not used
Administration	SRO Group
Payment Type	NA
Payment Method	NA

Report Period	Apr, 2022 (SSRC Web Survey) **Project Phase** Closing
Risk Level	*On Track*
Monthly Update	Delivered draft report on May 4th and did two revisions per client requests. Final version delivered 5/16/2022.
Special Issues	
Cost **May 09, 2022**	*Total Cost to Date (Direct + Indirect):* 5,794.00 *Estimated Cost at Completion (E$AC):* 11,500.00 *Total Budget:* 11,640.00 *Variance (Budget minus E$AC):* 140.00 *Reason For Variance:* NA - we expect to be very close to final budget with no hours charged beyond this month

Projections
May 09, 2022

Dollars Projected For Month:	5,152.00
Actual Dollars Used:	5,794.00
Variance (Projected minus Actual):	642.00
Reason For Variance:	Overall, we expect to be very close to final budget with no hours charged beyond this month

Measures

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

Other Measures

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

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

Principal Investigator/Client	James Wagner (University of Michigan) Robert Ursano (Uniformed Services University of the Health Scienc) Murray Stein / Ron Kessler (University of California San Diego / Harvard)
Funding Agency	Department of Defense
IRB	**HUM#:** HUM00180765 **Period Of Approval:** 4/21/22 - 4/20/23
Project Team	**Project Lead:** Meredith A House **Budget Analyst:** William Lokers **Production Manager:** Ruth B Philippou **Senior Project Advisor:** Lisa S Holland **Production Manager:** Jeffrey Albrecht Jr **Production Manager:** Lisa M Lewandowski-Romps
Proposal #:	no data
Description:	This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025. For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data. To date, we have completed 2 waves of STARRS-LS interviewing. During Wave 1, we attempted to contact 50,000 individuals and completed approximately 14,500 full interviews. All Wave 1 participants that completed a full Wave 1 interview were asked to participate in Wave 2. Waves 3 and 4, which are covered in this application, will include the full STARRS-LS Wave 2 sample, regardless of whether they completed the interview. In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys).

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

Milestone Dates

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

Other Project Team Members:	Heather Schroeder, Paul Burton, Ryan Yoder, Keith Liebetreu, Becky Loomis, Cheng Zhou, Andrew Piskorowski, Rose Zdybel, Lamont Manley, Lisa Van Havermaet, Stephanie Windisch, Youhong Liu, Peter Sparks. Pam Swanson, Andrew Hupp, Jim Rodgers, Kyle Goodwin, Marcus Blough, Nick Hinkle-DeGroot, Pete Westhead, Maureen O'Brien

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

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

Monthly Update

☐ We have released eleven replicates (11,794 sample lines) and completed 8,881 interviews as of April 29. We experienced interviewer staffing shortages which led to a decreased response rate for Replicate 11.

☐ We completed the SHOS-A recruitment effort, which resulted in 28 individuals agreeing to join STARRS-LS.

☐ The team held discussions regarding improvements and efficiencies related to technical design for Wave 4 sample management.

☐ We continued bi-weekly meetings with M&RA to coordinate Safety Plan and respondent locating activities. U-M staff also attended an ad hoc meeting with M&RA and the head Chaplains from active Army, Reserve and National Guard to discuss a contingency plan for the Safety Plan should the M&RA support services contract funding not have come through.

☐ We received two memos from the GSC regarding the ICPSR-related biosample work and the Wave 4 survey. Neither memo changed the direction of our work. We will work toward producing the budget information requested.

☐ We worked with Josh to obtain the No Cost Extension approval for the Year 2 award.

☐ We awaited the Letter of Intent (LOI) to fund Year 3 from HJF.

☐ Per Dr. Kessler's request, we provided a ballpark budget for qualitative interviews, which are to be carried out to inform the STARRS transitional services study. (Note, it is not clear yet whether this project would be part of STARRS scope or funding, but the effort to produce the ballpark was not covered by STARRS funds).

☐ IRB:

o The continuing review for the current STARRS-LS protocol was submitted to and approved by the U-M IRB, then submitted to USUHS for secondary review.

o We continued work on the amendment for Wave 4.

☐ All project staff with current access to the UM-STARRS Data Enclave completed their Annual Security Training Renewals.

☐ U-M worked to produce artifacts required by AAG for the Annual Security Controls Review.

☐ We received approval for the NDI Repeat Request Form from U-M ORSP and submitted it to the NDI office at the CDC. However, we were instructed that Dr. Ursano should complete and submit the paperwork this year. We prepared the form and supporting documents and sent them to USUHS.

☐ Two biomarker group requests were worked this month.

☐ Per Harvard's request, we produced and delivered the final Wave 3 survey crosswalk for Replicates 1-8 data.

☐ We determined that we will create one combined budget for all of the ICPSR-related activities - biosample flags, admin variables, and inventory document.

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

☐ A shortage of interviewing staff has led to a decreased response rate for Replicate 11. We will continue to work with our Survey Services Lab (SSL) on multiple strategies to resolve the situation, including preparing for a training of four new interviewers to be held in May. We will also consider extending the field period for Replicate 11.

☐ 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. The current Wave 4 projections assume an instrument length similar to that of Wave 3. If the Wave 4 survey involves longer CATI administration times, the Wave 4 production costs will increase. We will know more after having completed three or four Wave 4 replicates. In general, we continue to monitor the situation closely.

☐ We are receiving more anecdotal reports of respondents saying the token of appreciation isn't enough to make participation in the survey worth their while. Some are individuals who received $100 last time, and are still in phases offering $50. For others, the dollars are not enough for the time involved. We are mindful that Wave 4 response rates may be negatively affected by respondents' experience with the longer Wave 3 survey (even without additional W4 content). If the first few replicates of Wave 4 yield lower than expected response rates, we will propose implementing an incentive experiment of, most likely, $75 and $150 dollars for approximately three replicates. We will want to explore whether an incentive increase is merited (especially if there are further waves of data collection).

☐ 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, 2021 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
Mar 31, 2022

Total Cost to Date (Direct + Indirect):	4,562,209.04
Estimated Cost at Completion (E$AC):	13,001,604.44
Total Budget:	12,809,390.00
Variance (Budget minus E$AC):	-192,214.44
Reason For Variance:	After thorough updates to the projections for the remainder of Wave 3 and Wave 4, the overall overrun decreased to $192,214 (from $353,476). Broad stroke updates included:
	-Adjustments to projected hours for staff across all tasks based on past charges and considering upcoming work scope.
	-Updates for newly assigned staff members and distribution of hours to tasks.
	-Updates to production salary and non-salary costs based on observed results and past charges. Wave 4 based on 18 month data collection.

Projections
Mar 31, 2022

Dollars Projected For Month:	264,110.19
Actual Dollars Used:	219,152.13
Variance (Projected minus Actual):	44,958.06
Reason For Variance:	$25K of the variance was due to the Enclave server that did not hit (again). The Enclave staff / data management charges were also significantly less than projected.

Measures

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

Other Measures

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

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

Project Type	Sponsored Projects		**Project Status**	Current	

Budget	**Direct Budget:**	241,958.00	**InDirect Budget:**	135,497.00	**Total Budget:**	377,455.00

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

Funding Agency National Science Foundation

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

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

Proposal #: no data

Description:

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

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

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

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

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

Other Project
Names:
Video Communication Technologies

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

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

Risk Level   *On Track*

Monthly Update   The team revised the first methods paper and submitted to Methods, Data, Analyses (MDA) (A online, open-access journal published by GESIS) in February. MDA reviewed the paper and have asked for some edits. The team will work on revisions in May.
The interview effects paper came out as an advance article at JSSAM in December 2021. The survey data sets will be made publicly available via openICPSR.

Kallan is working on the recruitment and participation paper. She is also documenting the R code for eventual release as part of the documentation at ICPSR.

Andrew and Kallan are working on a paper on respondent burden that will use some data from the video project.

Kelly worked with Kallan on archiving the study.

Laura provided a final MSMS data set.

Special Issues

Cost
May 13, 2022

Total Cost to Date (Direct + Indirect):	374,638.36
Estimated Cost at Completion (E$AC):	377,431.27
Total Budget:	377,455.00
Variance (Budget minus E$AC):	23.73

| | **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
May 13, 2022**

Dollars Projected For Month:	6,301.85
Actual Dollars Used:	3,463.86
Variance (Projected minus Actual):	2,837.99
Reason For Variance:	There was a timesheet error that led to the underrun for the month. The timesheet is being corrected and reprocessed.

Measures

	Units Complete	RR	HPI
Current Goal:	855	20%	
Goal at Completion:	855		
Current actual:	1,109	12.5%	
Estimate at Complete:			
Variance:			

Other Measures

Project Name	(WCJ -Remote Pilot) Woodcock-Johnson Remote Administration Pilot
Project Mode	Primary: Telephone
Project Type	Sponsored Projects

Project Status Current

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

Principal Investigator/Client	Narayan Sastry (U of M/ISR/SRC) Paula Fomby (U of M/ISR/SRC)
Funding Agency	
IRB	**HUM#:** **Period Of Approval:**

Project Team

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

Proposal #:   no data

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

The current effort includes 2 components:
  1) Technical system development and testing
  2) Pre-test (n=20 families) to test system and feasibility

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

SRO Project Period	07/2021 - 05/2022
Data Col Period	02/2022 - 03/2022
Security Plan	NA
Milestone Dates	

PreProduction Start:	07/01/2021	**Pretest Start:**	02/01/2022
Pretest End:	03/05/2022	**Recruitment Start:**	
Staffing Completed:		**GIT Start:**	
SS Train Start:		**SS Train End:**	
DC Start:		**DC End:**	

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

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

Report Period	Apr, 2022 (WCJ -Remote Pilot)	**Project Phase**	Closing

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 finishing the data collection efforts
- Continue to provide oversight on all team tasks
- Reviewed and adjusted March 2022 cost report with the financial analyst
- Initiated the process of WJ Blaise Scoring
- successfully debriefed (summary and lesions learned) with the PIs
- final steps will be to finalize SRO scoring and to prepare the data delivery to the PIs
- Had the final check-in with the PIs for any remaining management notes
- Assessments scoring is in progress for final delivery

Technical System Development and Testing (Component 1): Completed
- No more development on the instrument
- stored away the tablets and WJ Easels securely.

Hire and Recruitment:
-Completed in Jan 2022

Training
-Completed in Jan 2022

Production
- finalized data collection efforts
- Completed a total of 32 Interviews (16 families) - samples are across different spectrums on demographics, race, education, ages (5-17) and gender.
- mailed all TOA of 32 checks (total of $1600.00)
- terminated the data plan for 5 tablets

Special Issues

Cost
Apr 30, 2022

Total Cost to Date (Direct + Indirect):	79,802.55
Estimated Cost at Completion (E$AC):	80,854.20
Total Budget:	102,139.00
Variance (Budget minus E$AC):	21,284.80
Reason For Variance:	This underrun is due to a variety of staff working less hours in April 2022 than projected. The amount of the underrun will be adjusted in May 2022

Projections
Apr 30, 2022

Dollars Projected For Month:	6,212.89
Actual Dollars Used:	3,118.33
Variance (Projected minus Actual):	3,094.56
Reason For Variance:	This underrun is due to a variety of staff working less hours in April 2022 than projected. The amount of the underrun will be adjusted in May 2022.

Measures

	Units Complete	RR	HPI
Current Goal:	30		
Goal at Completion:	30		
Current actual:	32		
Estimate at Complete:	30		
Variance:	2		

Other Measures

	Units Complete	RR	HPI
Current Goal:	30		
Goal at Completion:	30		
Current actual:	32		
Estimate at Complete:	30		

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

Project Status Current

Budget	*Direct Budget:* 62,440.00	*InDirect Budget:* 12,488.00	*Total Budget:* 74,928.00

Principal Investigator/Client
Zeina Mneimneh (University of Michigan)
Salma Mawfek Khaled (Qatar University)

Funding Agency
Cambridgeshire and Peterborough NHS Foundation Trust

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

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

Proposal #:   no data

Description: SRC joins Social & Economic Survey Research Institute at Qatar University for the upcoming World Mental Health Study in Qatar to conduct CIDI train-the-trainer training and build a quality assurance tool. The timing expectation is that SRC has an initial working version of the QC tool in time for a January 2020 data collection pilot, then refinements will be made for an October 2020 production launch. The Qatar team will be using the standard CIDI questionnaire instrument (Blaise 5), and they have Blaise programming expertise and their own sample management system. SRC had originally envisioned this as a version of our OLAP Cube, but have since moved away from that and toward a more "ODS"-type approach. SRC scope of work includes CIDI training, methodological designs for in-person and phone call verification, quality control indicators/interventions, and technical designs for quality assurance infrastructure and dashboard, etc.

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

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

Other Project Team Members: Cheng Z. (Application Programmer), Jay L. (PM), Gina-Qian C. (SPA), Sarah B. (System Analyst)

Other Project Names:

Sample Mgmt Sys	Other (Blaise 5)
Data Col Tool	Blaise 5
Hardware	Laptop; Tablet
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, Other (TBD)
Administration	Other (Qatar University)
Payment Type	Other (TBD)
Payment Method	Other (TBD)

--- --- --- --- --- --- --- --- ---

Report Period	Apr, 2022 (WMH-Qatar)	**Project Phase**	Closing
Risk Level	*On Track*		
Monthly Update	Finalized all work on this project. Client has been sent final cost report.		
Special Issues	None		

Cost
Apr 30, 2022

Total Cost to Date (Direct + Indirect):	73,690.49
Estimated Cost at Completion (E$AC):	73,690.49
Total Budget:	74,928.00
Variance (Budget minus E$AC):	1,237.51
Reason For Variance:	Hours have been reallocated for the upcoming months.

Projections
Apr 30, 2022

Dollars Projected For Month:	1,528.49
Actual Dollars Used:	1,361.42
Variance (Projected minus Actual):	167.07
Reason For Variance:	no more tasks assigned.

Measures

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

Other Measures

Survey Research Operations

Monthly Project Report

Development Initiative and No Data Collection Projects

April 2022

Developmental Initiatives

TSME 22-Blaise 5 Testing
TSME22-Day in the Life Videos
TSME22-DCO Tech System Support
TSME22-WebTrak/WebLog ColdFusion Server Upgrade
TSME22-PIPPA 2.0
TSME22-QC-Systems
TSME22-Self-Scheduling Interface for MSMS
TSME22-ST International

Developmental/Initiative Projects Dashboard

NonArchived Development Initiative and No-DataCol Projects

Project	Type	Status	Project Lead	Jan	Feb	Mar	Apr
TSME 22-Blaise 5 Testing (423562)	Initiatives	Current	Gina-Qian Yang Cheung	🟢	🟢	🟢	🟢
TSME SRO SYS MAINTENANCE-GENERAL (483910)	Initiatives	Current	Jeffrey L Smith	🟢	🟢	☐	☐
TSME22 Day in the life of Video	Initiatives	Current	Vivienne Y Outlaw	🟢	🟢	🟢	🟢
TSME22 DCO Tech System Support FY22	Initiatives	Current	Vivienne Y Outlaw	🟡	🟢	🟡	🟡
TSME22 WebTrak/WebLog CF Upgrade (425197)	Initiatives	Current	Hueichun Peng	🟢	🟢	🟢	🟢
TSME22-PIPPA	Initiatives	Current	Mark Simonson	🟢	🟢	🟡	🟢
TSME22-QC-Systems (483249)	Initiatives	Current	Sarah Elisa Broumand	🟢	🟢	🟢	🟢
TSME22-SelfSchedUI (483424)	Initiatives	Current	Andrew L Hupp	🟢	🟢	🟢	🟢
TSME22-ST international (483227)	Initiatives	Current	Gina-Qian Yang Cheung	🟢	🟢	🟢	🟢

| **Project Name** | (TSME 22-Blaise 5 Testing (423562)) TSME 22-Blaise 5 Testing (423562) |

Project Mode   Primary: Not Available

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

| **Budget** | ***Direct Budget:*** 30,000.00 | ***InDirect Budget:*** 0.00 | ***Total Budget:*** 30,000.00 |

Principal Investigator/Client

Funding Agency

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

Project Team	***Project Lead:***	Gina-Qian Yang Cheung
	Budget Analyst:	Janelle P Cramer
	Production Manager:	
	Senior Project Advisor:	
	Production Manager:	
	Production Manager:	

Proposal #:   no data

Description: this project for testing Blaise new features

SRO Project Period   08/2021 - 06/2022

Data Col Period

Security Plan   NA

Milestone Dates

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

Other Project Team Members:

Other Project Names:

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

- -

| **Report Period** | Apr, 2022 (TSME 22-Blaise 5 Testing (4 | **Project Phase** | Initiation |

Risk Level   *On Track*

Monthly Update   No activities

Special Issues

Cost **May 17, 2022**	***Total Cost to Date (Direct + Indirect):***	10,978.06
	Estimated Cost at Completion (E$AC):	16,288.72
	Total Budget:	30,000.00
	Variance (Budget minus E$AC):	13,711.28
	Reason For Variance:	No changes

Projections
May 17, 2022

Dollars Projected For Month:	2,655.33
Actual Dollars Used:	2,385.97
Variance (Projected minus Actual):	269.36
Reason For Variance:	No much work

Measures

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

Other Measures

Project Name	(TSME22 Day in the life of Video) TSME22-Day in the Life Videos (425201)
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

Project Status Current

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

Principal Investigator/Client

Funding Agency

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

Proposal #:	no data
Description:	Funding to be used to update the Day in the Life videos for both the field and SSL.

SRO Project Period	07/2021 - 06/2022
Data Col Period	
Security Plan	NA
Milestone Dates	

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

Other Project Team Members:	Russ Stark
	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	Apr, 2022 (TSME22 Day in the life of Vi	**Project Phase**	Initiation

Risk Level	*On Track*
Monthly Update	We were asked to change the final video to address masking requirements
Special Issues	

Cost **May 17, 2022**	***Total Cost to Date (Direct + Indirect):***	12,440.47
	Estimated Cost at Completion (E$AC):	12,440.47
	Total Budget:	12,500.00
	Variance (Budget minus E$AC):	59.53
	Reason For Variance:	work completed under budget

Projections
May 17, 2022

Dollars Projected For Month:	441.82
Actual Dollars Used:	457.94
Variance (Projected minus Actual):	-16.12
Reason For Variance:	change in workscope

Measures

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

Other Measures

Project Name	(TSME22 DCO Tech System Support FY22) TSME22-DCO Tech System Support (483248)
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives **Project Status** Current
Budget	***Direct Budget:*** 30,000.00 ***InDirect Budget:*** 0.00 ***Total Budget:*** 30,000.00
Principal Investigator/Client	

Funding Agency

IRB	*HUM#:*	*Period Of Approval:*
Project Team	*Project Lead:*	Vivienne Y Outlaw
	Budget Analyst:	Carl S Remmert
	Production Manager:	Hueichun Peng
	Senior Project Advisor:	Gregg Peterson
	Production Manager:	
	Production Manager:	

Proposal #:	no data
Description:	This includes all the support and development work for a suite of tech systems DCO uses, including Fred, Recruitment Website, Iwer Web Site, etc.
SRO Project Period	07/2021 - 06/2022
Data Col Period	
Security Plan	NA

Milestone Dates

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

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

Report Period	Apr, 2022 (TSME22 DCO Tech System **Project Phase** Implementing
Risk Level	*Some Concerns*
Monthly Update	1. Met with Sarah and Mark to understand the issues of ODS reporting as related to ShortCode and assignment. 2. Added ShortCode_Official and ProjectName_Official for ODS for reporting purposes. 3. Updated the Salary Pre-Preparation module to accommodate the 2022-special-differential. 4. Continued the exploration work on WordPress dev environment. 5. Started to plan ahead with Visual Studio and .Net framework updates for the whole Recruitment website suites (including 5 different systems.)
Special Issues	

Cost
May 17, 2022

Total Cost to Date (Direct + Indirect):	25,895.09
Estimated Cost at Completion (E$AC):	30,106.46
Total Budget:	30,000.00
Variance (Budget minus E$AC):	-106.46
Reason For Variance:	The budget was not sufficient to cover amount of support needed for DCO systems including moving to new servers and the need to move to update the Interviewer Website.

Projections
May 17, 2022

Dollars Projected For Month:	2,105.68
Actual Dollars Used:	1,135.64
Variance (Projected minus Actual):	970.04
Reason For Variance:	The budget was not sufficient to cover amount of support needed for DCO systems including moving to new servers and the need to move to update the Interviewer Website.

Measures

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

Other Measures

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

Project Type	Developmental Initiatives	**Project Status**	Current

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

Principal Investigator/Client

Funding Agency

IRB	*HUM#:*	*Period Of Approval:*	
Project Team	*Project Lead:*	Hueichun Peng	
	Budget Analyst:	Carl S Remmert	
	Production Manager:	HollyJoyce Stewart Ackerman	
	Senior Project Advisor:	Gregg Peterson	
	Production Manager:		
	Production Manager:		

Proposal #:	no data
Description:	This initiative plans to upgrade the CF server for Web Logging and PIPPA.

SRO Project Period	07/2021 - 06/2022
Data Col Period	
Security Plan	Yes

Milestone Dates

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

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

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

Monthly Update	Project is mostly done in March. We are just spending minimum time monitoring the performance of the new version.
Special Issues	NA

Cost **May 06, 2022**	*Total Cost to Date (Direct + Indirect):*	7,731.02
	Estimated Cost at Completion (E$AC):	8,715.13
	Total Budget:	5,000.00
	Variance (Budget minus E$AC):	-3,715.13
	Reason For Variance:	na

Projections
May 06, 2022

Dollars Projected For Month:	492.05
Actual Dollars Used:	508.52
Variance (Projected minus Actual):	-16.47
Reason For Variance:	na

Measures

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

Other Measures

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

Project Status Current

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

Principal Investigator/Client

Funding Agency

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

Proposal #: no data

Description: FY22 work on PIPPA. Overall goal is to enhance metrics by project and incorporate SurveyTrak projects into the PIPPA system.

SRO Project Period 07/2020 - 06/2021

Data Col Period

Security Plan NA

Milestone Dates

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

Other Project Team Members: Sarah Broumand, Cheng Zhou, Andrew Piskorowski

Other Project Names:

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

Report Period	Apr, 2022 (TSME22-PIPPA)	**Project Phase**	Implementing

Risk Level *On Track*

Monthly Update Had a PIPPA Planning meeting for FY 2023 requirements with stakeholders. Outlined key requirements. Moving data from SurveyTrak was a "Phase 4" item and has been moved to this FY (completed by end of FY 2022).

Special Issues

Cost

Total Cost to Date (Direct + Indirect):	0.00
Estimated Cost at Completion (E$AC):	0.00
Total Budget:	18,174.00
Variance (Budget minus E$AC):	0.00
Reason For Variance:	

Projections

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

Measures

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

Other Measures

Project Name	(TSME22-QC-Systems (483249)) TSME22-QC-Systems (483249)
Project Mode	Primary: Not Available

Project Type	Developmental Initiatives		**Project Status**	Current

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

Principal Investigator/Client

Funding Agency

IRB	*HUM#:*		*Period Of Approval:*
Project Team	*Project Lead:*	Sarah Elisa Broumand	
	Budget Analyst:	Carl S Remmert	
	Production Manager:		
	Senior Project Advisor:	Gina-Qian Yang Cheung	
	Production Manager:		
	Production Manager:		

Proposal #:	no data
Description:	Project used to maintaind and further develop Current QC systems such as OLIVE

SRO Project Period	07/2022 - 06/2022
Data Col Period	
Security Plan	NA

Milestone Dates

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

Other Project Team Members:	Shaowei Sun, Mark Simonson, LihShwu Key, Andrew P, Hueichun Peng, Larry Daher
Other Project Names:	
Sample Mgmt Sys	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Apr, 2022 (TSME22-QC-Systems (4832	**Project Phase**	Implementing

Risk Level	*On Track*

Monthly Update	Continuing developing the inter rater reliability feature in Olive. Additional time was spent fixing loading cases for projects such as EDC Midline. EDC's project resource data from FRED deviated from the norm. Most of the remaining hours on this project will be to cover the programming time for this as well as some reporting that has been backlogged for a long time.

Special Issues

Cost
Apr 30, 2022

Total Cost to Date (Direct + Indirect):   22,163.87
Estimated Cost at Completion (E$AC):   30,135.51
Total Budget: 30,000.00
Variance (Budget minus E$AC):   -135.51
Reason For Variance: minimal variance

Projections
Apr 30, 2022

Dollars Projected For Month: 5,576.32
Actual Dollars Used: 5,145.05
Variance (Projected minus Actual):   431.27
Reason For Variance: minimal variance

Measures

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

Other Measures

Project Name	(TSME22-SelfSchedUI (483424)) Self-Scheduling Interface for MSMS
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

			Project Status	Current	
Budget	*Direct Budget:* 10,000.00	*InDirect Budget:* 0.00		*Total Budget:*	10,000.00

Principal Investigator/Client

Funding Agency

IRB	*HUM#:*	*Period Of Approval:*	
Project Team	*Project Lead:*	Andrew L Hupp	
	Budget Analyst:	Megan Gomez-Mesquita	
	Production Manager:		
	Senior Project Advisor:		
	Production Manager:		
	Production Manager:		

Proposal #:	no data
Description:	This technical initiative will continue the work of the respondent facing scheduling interface that wasn't able to be completed the prior fiscal year. In the prior fiscal the basic scheduling tool was created. The current remaining work centers around creating the manager side interface to be able to set parameters and the resulting data MSMS will need to provide the Blaise scheduler. Most of the development work is on the MSMS side to build and interface and the aggregation of data to pass to Blaise to use to determine which appointment slots can be shown on the screen. This budget is for the Blaise side of the work, not the MSMS portion.
SRO Project Period	07/2021 - 06/2020
Data Col Period	
Security Plan	NA

Milestone Dates

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

Other Project Team Members:	James Rodgers - Tech Lead Holly Ackerman - Developer (MSMS API and other appointment related work) Peter Sparks - Developer (R facing page)
Other Project Names:	
Sample Mgmt Sys	NA
Data Col Tool	Blaise 5
Hardware	NA
DE Software	N/A
QC Recording Tool	N/A
Incentive	Not used
Administration	N/A
Payment Type	N/A
Payment Method	N/A

Report Period	Apr, 2022 (TSME22-SelfSchedUI (4834
Project Phase	Planning
Risk Level	*On Track*
Monthly Update	Nothing to report on the work to be done.

Andrew H. met with Gregg, Andrew, Andrew P., Mark, Peter and Jim to discuss how we might use ODS and what work (effort) might need to be done to modify the flow to only write data to MSMS (Blaise is already doing that), and "ask" ODS for the currently scheduled appointments and to have ODS summarize the appointment data to determine which times/days/dates to show as available in the interface for the respondent. The manager interface

will also be discussed to determine how the manager defines their parameters (# of appointment slots, iw length, blackout days, etc.). Andrew H. and Jim sent Mark and Andrew P. parameters and business rules so they could provide an estimate for how long it might take them. This work will be done in FY23.

Special Issues

Cost

Total Cost to Date (Direct + Indirect):	1,363.89
Estimated Cost at Completion (E$AC):	9,920.34
Total Budget:	10,000.00
Variance (Budget minus E$AC):	79.66
Reason For Variance:	

Projections

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

Measures

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

Other Measures

Project Name	(TSME22-ST international (483227)) TSME22 - ST international (483227)
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives **Project Status** Current
Budget	***Direct Budget:*** 40,000.00 ***InDirect Budget:*** 0.00 ***Total Budget:*** 40,000.00
Principal Investigator/Client	
Funding Agency	
IRB	***HUM#:*** ***Period Of Approval:***
Project Team	***Project Lead:*** Gina-Qian Yang Cheung ***Budget Analyst:*** Janelle P Cramer ***Production Manager:*** ***Senior Project Advisor:*** ***Production Manager:*** ***Production Manager:***
Proposal #:	no data
Description:	this is a continued effort for ST international work
SRO Project Period	01/1996 - 01/1996
Data Col Period	
Security Plan	NA

Milestone Dates

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

Other Project Team Members:	many members
Other Project Names:	ST international (483227)
Sample Mgmt Sys	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Apr, 2022 (TSME22-ST international (4 **Project Phase** Initiation
Risk Level	*On Track*
Monthly Update	updates for the general system features
Special Issues	
Cost **May 17, 2022**	***Total Cost to Date (Direct + Indirect):*** 25,100.62 ***Estimated Cost at Completion (E$AC):*** 34,493.80 ***Total Budget:*** 40,000.00 ***Variance (Budget minus E$AC):*** 5,506.20 ***Reason For Variance:*** some bug fixes

Projections
May 17, 2022

Dollars Projected For Month:	4,696.59
Actual Dollars Used:	5,063.98
Variance (Projected minus Actual):	-367.39
Reason For Variance:	bug fixes

Measures

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

Other Measures