

Survey Research Operations

Monthly Project Report

Sponsored

August 2022



Sponsored Projects

(AFHS) American Family Health Study
 (AFHS-Additional work) American Family Health Study - additional work
 (BFY) Baby's First Years
 (CARE Military) Concussion Assessment, Research and Education (CARE) Consortium 2022 - Military
 (CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022
 (CRUSE - AHDFS) Survey on Crypto-Asset Adoption and Use / American Household Digital Finance Survey
 (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
 (IHDS3) India Human Development Survey Wave 3
 (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
 (PSID TAS 2021) Transition to Adulthood within its Life Course & Intergenerational Family Context
 (PSID23) Panel Study of Income Dynamics Core 2023
 (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
 (STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study

Sponsored Projects Dashboard

NonArchived Sponsored Projects

Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
AFHS	Sponsored	Closing	Rebecca Gatward	●	●	●	●	●	●	●	●
AFHS-Additional work	Sponsored	Implementing	Rebecca Gatward	□	□	□	□	●	●	●	●
BFY	Sponsored	Implementing	Piotr Dworak	●	●	●	□	●	●	●	●
CARE Military	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	□	□	□	□	●	●	●	●
CARE SALTOS MTEC	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	●	●	●	●	●	●	●	●
CRUSE - AHDFS	Sponsored	Implementing	Piotr Dworak	□	□	□	□	□	□	●	●
ECHO (Year 6)	Sponsored	Implementing	Terri Ann Ridenour	●	●	●	●	●	●	●	●
EDC Midline	Sponsored	Closing	Barbara Lohr Ward	●	●	●	●	●	●	●	●
EDC-SS Phases 3-4	Sponsored	Implementing	Karin Schneider	●	●	●	●	●	●	●	●
HCAP 2022	Sponsored	Implementing	Maureen Joan O'Brien	●	●	●	●	●	●	●	●
HRS 2021 OYMS / COVID Survey	Sponsored	Closing	Ian Ogden	●	●	●	●	●	●	●	●
HRS 2022 Panel	Sponsored	Implementing	Evanthia Leissou	●	●	●	●	●	●	●	●
HRS2022-Screening	Sponsored	Implementing	Evanthia Leissou	●	●	●	●	●	●	●	●
IHDS3	Sponsored	Implementing	Sarah Elisa Broumand	□	□	□	●	●	●	●	●
MI CReSS (Year 2)	Sponsored	Implementing	Terri Ann Ridenour	●	●	●	●	●	●	●	●
MTF Base Year 2022_27	Sponsored	Implementing	Rebecca Gatward	□	□	□	●	●	●	●	●
MTF HID 22	Sponsored	Closing	Donnalee Ann Grey-Farquharson	●	●	●	●	●	●	●	●
MTF Panel 2022-27	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	□	□	□	●	●	●	●	●
PSID TAS 2021	Sponsored	Closing	Piotr Dworak	●	●	●	□	●	●	●	●
PSID23	Sponsored	Implementing	Rachel Anne Orłowski	□	□	□	□	□	□	●	●
PSID23 Online Contact Update	Sponsored	Implementing	Camila Kendall	□	□	□	●	●	●	●	●
PSID-PR	Sponsored	Implementing	Shonda R Kruger-Ndiaye	□	□	□	●	●	●	●	●
SCA 2022	Sponsored	Implementing	Theresa Camelo	●	●	●	●	●	●	●	●
SCIP 2021	Sponsored	Closing	Maureen Joan O'Brien	●	●	●	●	●	●	●	●
STARRS-LS Waves 3 & 4	Sponsored	Implementing	Meredith A House	●	●	●	●	●	●	●	●

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
Data Col Period
Security Plan
Milestone Dates

01/2019 - 03/2022

05/2020 - 04/2022

NA

PreProduction Start: 09/01/2018

Pretest End:

Staffing Completed:

SS Train Start:

DC Start: 04/21/2020

Pretest Start:

Recruitment Start:

GIT Start:

SS Train End:

DC End: 04/30/2022

Other Project
Team Members:

SRO Team: Andrew Hupp, Laura Yoder, Rose Zdybel, 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

Aug, 2022 (AFHS)

Project Phase

Closing

Risk Level

On Track

Monthly Update

August update

Current SRO focus: Two additional components, AFHS Panel Feasibility Survey and AFHS non-response follow-up. These are reported on separately in MPR.

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
Sep 16, 2022

Total Cost to Date (Direct + Indirect):

2,518,320.51

Estimated Cost at Completion (E\$AC):

2,518,320.51

Total Budget:

2,490,133.00

Variance (Budget minus E\$AC):

-28,187.51

Reason For Variance:

The main AFHS budget has overspend amount of \$18,399 (direct). Until around February this year we have consistently forecast an underspend on the project budget. The underrun was attributed to the lower response rates. However, as the design has changed in many ways since the original proposal, the source of the underrun could be due to other changes in design along with the use of a vendor for printing, mailing and scanning. The total underrun amount was reduced with the implementation of numerous methodological experiments and increasing the sample size for Replicate 2 by 3,000 addresses.

The main source of the overrun against projections earlier this year were respondent TOAs – we received a high number of completed paper surveys after returns had slowed. Overall, the longer than expected timeline is also a contributing factor to the overspend – we were due to begin data collection for the first replicate in September 2019 but this was delayed by six months and data collection for Replicate 2 was originally due to end in March 2021 with final deliverables due in October 2021. A portion of the overspend amount should be offset by refunded cheques. There are currently outstanding cheques to the value of \$8,680 from Replicate 2, due to be refunded from October 2022 (through to April 2023). The PI group have agreed to fund the overspend amount (this will also be paid through sequestering funds).

Projections
Sep 16, 2022

Dollars Projected For Month:

0.00

Actual Dollars Used:

-748.11

Variance (Projected minus Actual):

748.11

Reason For Variance:

Any additional spend will be charged to the short code for the 'AFHS additional work' - the overspend from the main AFHS and the additional work are being funded by sequestering funds.

A summary of costs to be funded by sequestering funds is attached (this includes the overspend on this project).

Measures

	Units Complete	RR	HPI
Current Goal:	2000 (main IWs)	33.3%	NA
Goal at Completion:	4000	33.3%	NA
Current actual:	2369	64%	NA
Estimate at Complete:	2369	64%	NA
Variance:	1631	+21% (see below)	NA

Other Measures

Project Name	(AFHS-Additional work) American Family Health Study - additional work		
Project Mode	Primary: Web	Secondary: Mail	Total of Modes: 3
Project Type	Sponsored Projects	Project Status	Current
Budget	Direct Budget: 50,265.00	Indirect Budget: 0.00	Total Budget: 50,265.00
Principal Investigator/Client	Brady West (SRC)		
Funding Agency	Internal UM sequestering funds		
IRB	HUM#: HUM00167171	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:	<p>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. The research design for the AFHS has seven clear steps. The additional work covered by this funding is to conduct step 7 (below):</p> <p>Step 1: finalize the design of the national web-based survey, using as much National Survey of Family Growth (NSFG) content as possible.</p> <p>Step 2: field the national web-based sequential mixed-mode survey over a two-year period, with the goal of collecting 4,000 completed surveys from a nationally representative sample.</p> <p>Step 3: conduct statistical analyses providing full-sample comparisons of estimates between our survey and the corresponding public-use data files for the NSFG from a similar time period.</p> <p>Step 4: conduct statistical analyses comparing estimates within key socio-demographic subgroups of the population – gender, race, and age groups.</p> <p>Step 5: examine changes in the gap in estimates (between the NSFG and our national web survey) across phases of the sequential mixed-mode design protocol.</p> <p>Step 6: compare costs, response indicators, and measures of effort across socio-demographic subgroups for different data collection modes and modules of the web-based survey.</p> <p>Step 7: further methodological research involving AFHS participants and non-respondents to inform the design of a larger-scale AFHS (research proposal).</p> <p>*****AFHS Panel Feasibility Survey*****</p> <p>The first component of this step involves AFHS respondents from the second sample replicate (n=~1370). These respondents will be invited to participate in a brief follow-up survey that aims to collect responses to a small number of additional questions (12) related to health, relationships, and finances, as well as gauge the interest of the respondent in becoming a panel member. These results will primarily be used to inform the design of a larger-scale AFHS study (research proposal); additional substantive analyses of the questions will also be conducted.</p> <p>All AFHS participants from the second sample replicate (n=~1370) will be invited to participate in the panel feasibility follow-up survey. The initial invitation to participants will be by letter, which will be mailed along with a \$2 token of appreciation. We will use addresses sampled for sample replicate 2 from the GENESYS system of Marketing Systems Group (MSG) - unless we received an updated address from the participant. We will also send the invitation by email for those participants who have provided a valid email address (84%).</p> <p>Non-response contact protocol:</p> <p>7 days after the initial invitation is mailed, participants will be contacted again by email (if available).</p> <p>14 days - we will send a further reminder by email or text message.</p> <p>21 days - email sent.</p> <p>28 days - paper copy of the survey along with a \$5 cash token to remaining non-responding participants.</p> <p>42 days - depending on the response rate we will telephone the participant to invite them to complete the follow-up survey.</p> <p>Participants will be mailed a \$10 check after completing the survey.</p>		

This additional survey has been added to the existing AFHS MSMS project as an additional task. The existing task rules have been updated to include this data collection task but the non-response contact protocol will not be driven by task rules. We will manually change the status of the mail, text, email tasks as needed for relevant cases.

Status:

- Currently testing the full process from opening the survey link to data being updated in MSMS.
- IRB amendment has been submitted and we have responded to requested changes following the first review.
- Sample address file has been provided to DataForce who will print the paper surveys, mail the initial invites, scan any returned paper surveys, deliver data to SRO and mail the final reminder letter with paper survey.

*******AFHS Non-response Follow-up*******

The second additional component is to gather information, using open-ended interviews, from AFHS non-respondents, to better understand why people did not participate in the study.

We identified the sampled addresses in AFHS Replicate 2 that: 1) did not respond to the screening invitation, 2) were located in Census Block Groups with more than 10% African-American or Hispanics, and 3) were in the top quartile of predicted probabilities of having a Spanish-speaker present. Then, based on the locations of available in-person interviewing staff from our organization, we sub-selected around 40 addresses from this list.

Initially, face-to-face attempts will be made to recruit a household member at each of these addresses to participate in a short non-response follow-up (an open-ended interview). If these face-to-face attempts are not successful, we may then make up to seven contact attempts by telephone (for addresses where a telephone number is available through database searches (for example, MSG and Experian)).

SRO Project Period
Data Col Period
Security Plan
Milestone Dates

06/2022 - 09/2022

06/2022 - 08/2022

NA

PreProduction Start:

Pretest End:

Staffing Completed:

SS Train Start:

DC Start:

Pretest Start:

Recruitment Start:

GIT Start:

SS Train End:

DC End:

Other Project
Team Members:

Grant Benson	Senior Project Advisor
Kallan Larsen	MSMS task rules and case monitoring
Wen Chang	DMSS (inc. Dashboard)
Raphael Nishimura	DMSS (sample selection and Weights)
Rebecca Gatward	Survey Director
James Rodgers	Technical lead/MSMS lead
Lloyd Hemingway	Production Manager
Dean Stevens	Financial Analyst
Andrew Hupp	MSMS and Web survey expertise
Deborah Wilson	Help Desk
Colette Keyser	Blaise programmer (inc. Portal)
Laura Yoder and Rose Zydel	Data Managers
Kasyera Kowalczyk	Project Assistant
'A More Efficient Web-Based Approach to Collecting National Family, Fertility and Reproductive Health Data'.	

Other Project
Names:

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

MSMS; Project specific system (For non-response follow-up we will just use Excel.)
Blaise 5
Paper and Pencil
External vendor (Data Force)
N/A
Yes, R; Yes, Other (for non-response follow-up we will use a non-monetary incentive.)
SRO Group
Check, post (\$10); Other (Non-monetary incentive)
Check through other system (RPay (MSMS))

Report Period Aug, 2022 (AFHS-Additional work) **Project Phase** Implementing

Risk Level On Track

Monthly Update August updates
 -Panel Feasibility Survey
 As of 8/21, 904 Rep 2 participants completed the panel feasibility survey (+5 since last week) at a Response Rate of 67%.
 -NonR follow-up
 Unstructured interviews have been completed with a hhld member at 20 non responding addresses (10 in CA, and 10 in NY)

Special Issues

Cost
Sep 16, 2022

Total Cost to Date (Direct + Indirect):	48,287.86
Estimated Cost at Completion (E\$AC):	53,285.13
Total Budget:	50,265.00
Variance (Budget minus E\$AC):	-3,020.13
Reason For Variance:	AFHS Feasibility Pilot Estimate – Expanded SRO # 22-0037R01 (Estimated costs at \$47,000 - \$53,000 direct costs. This estimate assumes that funding would be provided from UM internal sequestering funds and includes no indirect costs) The total cost at completion is still within the budgeted estimate (\$47k-\$53k) A summary of costs to be funded by sequestering funds is attached (dated 8_15_22).

Projections
Sep 16, 2022

Dollars Projected For Month:	20,420.58
Actual Dollars Used:	20,182.78
Variance (Projected minus Actual):	237.80
Reason For Variance:	

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

Other Measures

Project Name	(BFY) Baby's First Years			
Project Mode	Primary: Face to Face Total of Modes: 1			
Project Type	Sponsored Projects		Project Status	Current
Budget	Direct Budget:	5,843,681.00	Indirect Budget:	1,994,180.73 Total Budget: 7,837,861.73
Principal Investigator/Client	Dr. Greg Duncan (University of California - Irvine) Dr. Kimberly Noble (Teachers College Columbia University) Dr. Katherine Magnuson (University of Wisconsin)			
Funding Agency	National Institute of Child Health and Human Development (NICHD)			
IRB	HUM#:	HUM00137963	Period Of Approval:	
Project Team	Project Lead:	Piotr Dworak		
	Budget Analyst:	Janelle P Cramer		
	Production Manager:	Veronica Connors-Burge		
	Senior Project Advisor:	Stephanie A Chardoul		
	Production Manager:	Margaret Lavanger		
	Production Manager:	Michelle Smith		

Proposal #: no data

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

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

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

SRO will be responsible for four interactions with the selected mothers/infants:

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

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

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

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

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

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

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

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

Report Period

Aug, 2022 (BFY)

Project Phase

Implementing

Risk Level

On Track

Monthly Update

Project updates:

BFY Age 3 data collection has ended on June 30 with 922 completes exceeding the goal of 907 (and the proposal goal of n=860).

Interviewers are now conducting the Age3 3-month, 6-month, and 10-month check-in call or visit to confirm and update contact information and invite respondent to a lab visit conducted by the PI research teams at Age 4. At Age 3 + 10-month we are delivering data to the local lab research teams - the process continues to run smoothly.

The goal is to confirm contact information with at least 95% of cases. So far...

@ 3 month check-in 96% were confirmed

@ 6 month 87% were confirmed

@ 10 month 98% were confirmed and 364 cases were delivered to the lab

Staffing: In August, consolidation continues -- one of the BFY TLs is moving over to HRS. One additional iwer is scheduled to leave in October.

We also had one PDMG attrition @ the SSI level. The project is adequately staffed with the current SSA / PM / Survey Director hours and we don't plan to replenish the loss.

Age 3 Staffing:

12 iwers in total

NE: 1 OS + 1 NH (Trained 9/15)
 MN: 2
 NY: 5 OS
 NOLA: 1 (1 June resignation)
 TLs: 1 (- 1 has gone to HRS)

Technical system:
 All tech systems are working as needed.

Finances:
 We are now projecting underrun. The July cost report is yet to be reviewed, and a more precise view of the cost of the new Age 4 follow-up scope will come into focus in August after staffing changes and workload confirmation.

Special Issues

Cost
Sep 16, 2022

Total Cost to Date (Direct + Indirect): 6,973,242.34
Estimated Cost at Completion (E\$AC): 7,797,913.01
Total Budget: 7,837,861.73
Variance (Budget minus E\$AC): 39,948.72
Reason For Variance: The CRS report is off due to the complicated multi-funder agreement. As of last month (August) we were + 57K under and continue to grow underrun.

Projections
Sep 16, 2022

Dollars Projected For Month: 67,393.66
Actual Dollars Used: 37,045.90
Variance (Projected minus Actual): 30,347.76
Reason For Variance: Lower iwer hours/travel, lower tech dev costs, lower management costs.

Measures

	Units Complete	RR	HPI
Current Goal:	907	91%	7.0
Goal at Completion:	907	91%	7.0
Current actual:	921	92%	5.7
Estimate at Complete:	926	92%	6.0
Variance:			

Other Measures

Project Name	(CARE Military) Concussion Assessment, Research and Education (CARE) Consortium 2022 - Military					
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2					
Project Type	Sponsored Projects		Project Status	Current		
Budget	Direct Budget:	1,131,747.00	Indirect Budget:	294,254.00 Total Budget: 1,426,001.00		
Principal Investigator/Client	Dr. Steven Broglio (U of M Kinesiology) Dr. Micheal 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:	Carl S Remmert				
	Production Manager:	Stacy Quisenberry				
	Senior Project Advisor:	Barbara Lohr Ward				
	Production Manager:	Hongyu Johnson				
	Production Manager:	Keith Liebetreu				
Proposal #:	no data					
Description:	<p>The project follows academy cadets 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.</p> <p>This project has an overall SRO involvement period of 13 months, beginning March 2022, with data collection taking place over approximately 12 months starting mid-March 2022. SRO provides consultation, respondent locating activities and data collection for respondents in the uniformed services sample.</p> <p>The goal is to secure participation from approximately 3,200 unique past-CARE study participants. Participants will complete a study assessment once over the 13-month project period. SRO decentralized field interviewers locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct approximately 1,425 telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.</p> <p>The estimate total cost for the overall scope of work is \$1,426,001.00. This includes \$1,131,747.00 direct and \$294,254.00 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders).</p>					
SRO Project Period	02/2022 - 03/2023					
Data Col Period	03/2022 - 02/2023					
Security Plan	NA					
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="text-align: center; vertical-align: top;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>				PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:					
Other Project Team Members:	Donnalee Grey-Farquharson, Stacy Quisenberry, Hongyu Johnson, Keith Liebetreu, James Koopman, Minako Edgar, David Ackuaku, Carl Remmert					
Other Project Names:	CARE-CSI Military					
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	NA					
Payment Type	Check, post (\$150)					
Payment Method	Other (Kinesiology)					

Report Period Aug, 2022 (CARE Military) **Project Phase** Implementing

Risk Level On Track

Monthly Update

Care SMS system update:

- Developed a Registration troubleshooting guide tool in conjunction with Datalys to assist interviewers when speaking with respondents.
- Added system feature that allows interviewers to view registration information and activity.

Production and Hiring

- A "User Info" tab was added to the system in August. The tab was designed to help interviewers trouble shoot with respondents who are having difficulty accessing the web survey. Training on utilizing the tab effectively is an on going process as the project staff work with the developers to fully understand the tab attributes.
- Implemented a Contact Attempt Challenge Aug 27-29 in an effort to boost production over a three day period. The challenge was effective as contact attempts and completed interviews increased, interviewer hours increased and more interviewers worked on weekend days. A total of 14 interviewers were eligible for the prize drawing.
- Continue to host two Team Calls per week to boost productivity, reinforce best field practice protocols, and share experiences among the iwers.
- Production Status: as of 08/31/2022
 - *Total Released Sample number - 8359 cases (added Release #3-2396 cases to the previous released groups on 08/02/22)
 - *Total Comp lws - 1015 (Web - 1002, CATI -13)
 - *Total Response Rate - 12.2% (Web RR - 12.0%, CATI RR-0.2%)

DMSS

- There was a QC meeting for Locator's report with Locating Team TL to correct the discrepancies in the report.
- Call records of interviewers are now audited on a monthly basis to identify any significant difference in the call attempts and phone record.
- There was QC output for SIDs with blank call records.
- GuesGen clarify all samples to SRO must have CSI Manager ID equal 1 or 5.
- Data delivery has been smooth and the data is stable.

Locating:

- The productivity decreased due to one locator's illness and absence from work.
- The locators have been focusing on military locating efforts. Last week of August, the team worked 88 lines and found 12 R's which have been redistributed to the field - Complete to date 30 Civilian + 49 Military (Total 79) (+ final code out 10)
- Social Media- We are still waiting for the Social media request process to be finalized from the PI team. We are preparing lines that we can only communicate via social media as soon as the process request is finalized.

Special Issues

Cost

Aug 31, 2022

Total Cost to Date (Direct + Indirect):	391,590.35
Estimated Cost at Completion (E\$AC):	1,187,951.05
Total Budget:	1,426,001.00
Variance (Budget minus E\$AC):	238,049.95
Reason For Variance:	Updated Budget was recently uploaded into CRS. The projections will be adjusted in August.

Projections

Aug 31, 2022

Dollars Projected For Month:	98,076.20
Actual Dollars Used:	102,982.98
Variance (Projected minus Actual):	-4,906.78
Reason For Variance:	Budget was recently uploaded into CRS. Projections will be adjusted/reversed from being mistakenly charged to the CARE-CSI MTEC. They will definitely be reflected as so in next month's report.

Measures

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

Other Measures

Project Name	(CARE SALTOS MTEC) 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:	3,718,978.00	Indirect Budget:	966,936.00		
			Total Budget:	4,685,914.00		
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:	Carl S Remmert				
	Production Manager:	Stacy Quisenberry				
	Senior Project Advisor:	Barbara Lohr Ward				
	Production Manager:	Hongyu Johnson				
	Production Manager:	Keith Liebetreu				
Proposal #:	no data					
Description:	<p>SRO will provide consultation, respondent locating activities and data collection for respondents in the longitudinal Concussion Assessment, Research and Education (CARE) study, with the goal of securing participation from 7,500 unique past-CARE study participants. Participants will complete the same set of study assessments at two time points over the five-year project period. The project follows collegiate athletes post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure. Specifically, SRO decentralized field interviewers will locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.</p> <p>This budget assumes an overall SRO involvement period of approximately 44 months over two waves. Wave 1 SRO involvement will begin in December 2021 with data collection taking place over approximately 12 months, beginning approximately May 2022. Wave 2 SRO involvement will begin in November 2023 with data collection taking place over approximately 12 months starting in May 2024.</p> <p>Currently, the total cost for the overall scope of work (based on the currently committed funding from all sources) is estimated at \$4,685,914. This includes \$3,718,978 direct and \$966,936 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders). As additional sources of funding are identified and those resources committed to SRO survey data collection activities, or inversely if a funder withdraws or reduces their level of funding to the project, the scope of work (e.g., the number of interviews to be collected) will increase or decrease respectively.</p> <p>The estimate of funding contributed by the Department of Defense through the MTEC RFP is \$2,277,689. This includes \$1,807,689 direct costs and \$470,000 indirect costs budgeted at the 26% indirect cost rate. The proposed period of support is September 1, 2021 through August 31, 2025.</p>					
SRO Project Period	10/2021 - 08/2026					
Data Col Period	03/2022 - 02/2026					
Security Plan	NA					
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="width: 50%; text-align: center; vertical-align: top;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>				PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:					
Other Project Team Members:	Donnalee Grey-Farquharson, Stacy Quisenberry, Hongyu Johnson, Keith Liebetreu, James Koopman, Minako Edgar, David Ackuaku, Carl Remmert					

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 (\$150.00)
Payment Method	Check through other system (UM)

Report Period	Aug, 2022 (CARE SALTOS MTEC)	Project Phase	Implementing
----------------------	------------------------------	----------------------	--------------

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

Monthly Update	<p>Care SMS system update:</p> <ul style="list-style-type: none"> - Developed a Registration troubleshooting guide tool in conjunction with Datalys to assist interviewers when speaking with respondents. - Added system feature that allows interviewers to view registration information and activity. <p>Production and Hiring</p> <ul style="list-style-type: none"> - A "User Info" tab was added to the system in August. The tab was designed to help interviewers trouble shoot with respondents who are having difficulty accessing the web survey. Training on utilizing the tab effectively is an ongoing process as the project staff work with the developers to fully understand the tab attributes. - Implemented a Contact Attempt Challenge Aug 27-29 in an effort to boost production over a three day period. The challenge was effective as contact attempts and completed interviews increased, interviewer hours increased and more interviewers worked on weekend days. A total of 14 interviewers were eligible for the prize drawing. -Continue to host two Team Calls per week to boost productivity, reinforce best field practice protocols, and share experiences among the iwers. - Production Status: as of 08/31/2022 <ul style="list-style-type: none"> *Total Released Sample number - 8180 cases (added Release 3-3549 to the previous released groups) *Total Comp lws - 1787 (Web - 1766, CATI - 21) *Total Response Rate - 21.9% (Web RR - 21.7%, CATI RR-0.3%) <p>DMSS</p> <ul style="list-style-type: none"> - There was a QC meeting for Locator's report with Locating Team TL to correct the discrepancies in the report. - Call records of interviewers are now audited on a monthly basis to identify any significant difference in the call attempts and phone record. - There was QC output for SIDs with blank call records. - GuesGen clarify all samples to SRO must have CSI Manager ID equal 1 or 5. - Data delivery has been smooth and the data is stable. <p>Locating:</p> <ul style="list-style-type: none"> -The productivity decreased due to one locator's illness and absence from work. -The locators have been focusing on military locating efforts. Last week of August, the team worked 88 lines and found 12 R's which have been redistributed to the field - Complete to date 30 Civilian + 49 Military (Total 79) (+ final code out 10) -Social Media- We are still waiting for the Social media request process to be finalized from the PI team. We are preparing lines that we can only communicate via social media as soon as the process request is finalized.
-----------------------	--

Special Issues

Cost		
Aug 31, 2022	Total Cost to Date (Direct + Indirect):	519,259.87
	Estimated Cost at Completion (E\$AC):	4,640,181.62
	Total Budget:	4,685,914.00
	Variance (Budget minus E\$AC):	45,732.38
	Reason For Variance:	Updated Budget was recently uploaded into CRS. The underrun value is closely reflecting the current projection. The projection will be revisit in Sept 2022.

Projections
Aug 31, 2022

<i>Dollars Projected For Month:</i>	91,635.16
<i>Actual Dollars Used:</i>	77,661.54
<i>Variance (Projected minus Actual):</i>	13,973.62
<i>Reason For Variance:</i>	Budget was recently uploaded into CRS. We will make adjustments on projections and charges that will be reflected in Sept 2022. Future projections will be in-line with actual costs.

Measures

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

Other Measures

Project Name	(CRUSE - AHDFS) Survey on Crypto-Asset Adoption and Use / American Household Digital Finance Survey												
Project Mode	Primary: Web	Secondary: Focus Group	Total of Modes: 2										
Project Type	Sponsored Projects	Project Status	Current										
Budget	Direct Budget: 625,726.00	Indirect Budget: 9,618.00	Total Budget: 635,344.00										
Principal Investigator/Client	Vikramaditya Khanna (UM Law School)												
Funding Agency													
IRB	HUM#: HUM00214234	Period Of Approval:	1/1/2022-12/31/2022										
Project Team	Project Lead: Piotr Dworak Budget Analyst: William Lokers Production Manager: Senior Project Advisor: Lisa S Holland Production Manager: Production Manager: Ian Ogden												
Proposal #:	no data												
Description:	<p>Revised project costs are \$635,344 (\$625,726 + \$9,618). Original description below. Focus groups completed as designed. Project has been revised in that the PI has requested only an initial replicate be used for the survey pending full funding availability. Also, full indirect rate is not applied as we originally indicated. ORSP and Financial Services determined this was not research but was in fact other sponsored activity. IDC revised to 29%. ORIGINAL DESCRIPTION:</p> <p>SRO will conduct two exploratory focus groups and web-based data collection to study awareness, use and adoption of crypto-assets in the general population and more specifically among those more informed about crypto-assets. SRO will screen an address-based representative sample of approximately 40,980 U.S. households for adults who hold or have held crypto-assets. All who report crypto-asset holdings will be invited to participate in the web survey, along with a random sub-sample of those who have not held crypto-assets. SRO interviewers will conduct reminder calling to non-respondents to encourage them to participate in the survey.</p> <p>This budget assumes an overall SRO involvement period of 12 months commencing in May 2022 with focus groups taking place in May or early June 2022 and the web data collection taking place during a 5-month period beginning September 2022. The total cost for this work is estimated at \$1,724,766 (\$1,105,619 direct, \$619,147 indirect), budgeted at the University-approved indirect recovery rate of 56 percent. \$635,344 (\$625,726 + \$9,618).</p>												
SRO Project Period	05/2022 - 04/2023												
Data Col Period	10/2022 - 02/2023												
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%;"> <tr> <td>PreProduction Start: 08/01/2022</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start: 09/01/2022</td> </tr> <tr> <td>Staffing Completed: 09/30/2022</td> <td>GIT Start: 11/29/2022</td> </tr> <tr> <td>SS Train Start: 11/29/2022</td> <td>SS Train End: 11/29/2022</td> </tr> <tr> <td>DC Start: 10/24/2022</td> <td>DC End: 03/01/2023</td> </tr> </table>			PreProduction Start: 08/01/2022	Pretest Start:	Pretest End:	Recruitment Start: 09/01/2022	Staffing Completed: 09/30/2022	GIT Start: 11/29/2022	SS Train Start: 11/29/2022	SS Train End: 11/29/2022	DC Start: 10/24/2022	DC End: 03/01/2023
PreProduction Start: 08/01/2022	Pretest Start:												
Pretest End:	Recruitment Start: 09/01/2022												
Staffing Completed: 09/30/2022	GIT Start: 11/29/2022												
SS Train Start: 11/29/2022	SS Train End: 11/29/2022												
DC Start: 10/24/2022	DC End: 03/01/2023												
Other Project Team Members:	Karin Schneider conducted focus group. Survey phase led by Piotr Dworak. Team include Ian Ogden and Xiomara Guerra.												
Other Project Names:	American Household Digital Finance Survey												
Sample Mgmt Sys	Web SMS												
Data Col Tool	Blaise 4.8												
Hardware	Other												
DE Software	N/A												
QC Recording Tool	N/A												
Incentive	Yes, R												
Administration	SRO Group												
Payment Type	Cash, prepaid (\$2); Other (survey completes paid by check)												
Payment Method	Check through other system (focus groups recd e-gift card (Tango))												

Report Period Aug, 2022 (CRUSE - AHDFS) **Project Phase** Implementing

Risk Level On Track

Monthly Update Project has received its name -- American Household Digital Finance Study (AHDFS). In August and September we have finalized contract with DataForce to mail invitation / reminder mailings, procured sample, finalized the first draft of the survey and completed 80% of the programming, completed specifications for WSMS, drafted study materials (logos, etc.) and have submitted the IRB amendment describing the quant portion of the study (amending the exempt Focus Group application). IRB is expected to weigh in and confirm whether or not the study continues to be exempt or will need to be reviewed.

Final data collection assumptions:

- Invite 12,600 households (divide into Rep 1 ~ 25% and Rep 2)
- Reminder 1 and 2
- Non response reminder calling to phone appends (expected ~ 50%)
- Reminder 3 (end-game)

Current data collection timeline is mainly driven by PI delays in finalizing the survey draft (expected finalization 8/24 and actual almost a month later on 9/19). There are no pressures from the client (Coinbase) on the timeline but the PIs would like to kick the project off as soon as possible. We are working around the mid-term elections on 11/8 2022 and Thanksgiving and the current plan is to release rep 1 on the week of 10/24 and conduct all reminders / release rep 2 after the elections and before Thanksgiving.

We are also working with SSL to determine the best shift schedule. Non-response reminder calling training is set for 11/29.

Special Issues

Cost
Aug 31, 2022

Total Cost to Date (Direct + Indirect):	21,300.00
Estimated Cost at Completion (E\$AC):	635,344.00
Total Budget:	635,344.00
Variance (Budget minus E\$AC):	0.00
Reason For Variance:	

Projections
Aug 31, 2022

Dollars Projected For Month:	21,300.00
Actual Dollars Used:	21,300.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	

Measures

	Units Complete	RR	HPI
Current Goal:	2000	15%	
Goal at Completion:	2000	15%	
Current actual:	0	0%	
Estimate at Complete:	2000	0%	
Variance:			

Other Measures

Project Name	(ECHO (Year 6)) Environmental Influences on Child Health Outcomes				
Project Mode	Primary: Face to Face		Secondary: Telephone	Total of Modes: 3	
Project Type	Sponsored Projects			Project Status	Current
Budget	Direct Budget:	273,933.00	Indirect Budget:	153,403.00	Total Budget: 427,336.00
Principal Investigator/Client	Nigel Paneth (Michigan State University) Michael Elliott (University of Michigan) Jean Kerver (Michigan State University)				
Funding Agency	NIH				
IRB	HUM#:	HUM00139050	Period Of Approval:	10/2/2021-8/13/2022	
Project Team	Project Lead:	Terri Ann Ridenour			
	Budget Analyst:	Parina Kamdar			
	Production Manager:				
	Senior Project Advisor:	Evanthia Leissou			
	Production Manager:	Ian Ogden			
	Production Manager:	Sharon K Parker			
Proposal #:	no data				
Description:	<p>The goal of ECHO is to understand pressing childhood health concerns such as autism spectrum disorders, low birth weight and childhood obesity. The project will collect survey data and a series of bio-specimens in order to assess the effects of persistent organic pollutants and heavy metals, maternal nutritional or weight status in pregnancy, and pregnancy infection and inflammation on the health of children.</p> <p>The study includes two sample cohorts: a cohort from previous, ongoing data collection efforts as well as new sample. This existing sample cohort includes mothers and children recruited in 2011 or later for the Archive for Research in Child Health (ARCH) study in the Lansing area. The newly recruited sample cohort, MARCH (Michigan Archive for Research in Child Health), will consist of 1,100 pregnant women: 1) a statewide probability sample of 1,000 women from 20 prenatal clinics affiliated with 10 hospitals located in Ann Arbor, Dearborn, Detroit, Grand Rapids, Novi, Saginaw, Port Huron and Traverse City, and 2) 100 women from one clinic in Flint.</p> <p>SRO's work scope is divided into two phases. During Phase 1, SRO provided assistance with prenatal questionnaire development and designed technical systems for MARCH cohort recruitment conducted by Michigan State University-employed (and other hospital-employed) interviewers and affiliated project staff. During Phase 2, SRO developed systems and is conducting data collection for MARCH sample 3-month. The MARCH age 4-5 follow up interviews and home visits are also in SRO's work scope. All other follow up protocols with the MARCH sample will be administered via REDCap by the MSU team (e.g. at 9-month, age 2 and age 3).</p> <p>For the MARCH sample, expectant mothers are recruited during their initial prenatal visit to a healthcare provider. During a follow up phone call, respondents are asked to complete an interview about nutrition, levels of physical activity, use of healthcare services, physical and mental health, prescription medications and other substance use. In addition, women are asked to give blood samples in the first and second trimesters and urine samples in all three trimesters.</p> <p>The sample recruitment and administration of prenatal interviews is conducted by MSU-employed (and other hospital-employed) interviewers using SRO's technical systems and laptops. SRO programmed all questionnaires administered during recruitment, the sample management system(s), and the system to keep track of the collection and storage of blood and urine samples. When babies are born, the research team obtains hospital birth records for the mother and child and a placenta sample. The first MARCH babies were born in early 2018.</p> <p>SRO's data collection activities start after the MARCH babies are born. The first interview with the mother is done when the baby is 3-6 months old. Mothers are interviewed again by MSU when the children are 9-12 months old, and yearly after that until the child is 4 years old. When the children are 3 months old, mothers are asked to provide a child fecal sample and toenail clippings, and at age 4 they will provide shed teeth. Children from the MARCH cohort will be assessed using standardized developmental assessments at 4-5 years old. The assessments will be done during in-home visits.</p>				
SRO Project Period	01/2017 - 08/2023				
Data Col Period	05/2018 - 03/2023				
Security Plan	NA				

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

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

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

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

Report Period

Aug, 2022 (ECHO (Year 6))

Project Phase

Implementing

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

[Phase 1: Recruitment and Prenatal Surveys]

Recruitment and follow-up continues in 6 prenatal clinics.

--Ann Arbor (St. Joe)

--Novi (St. John)

--Dearborn (Beaumont)

--Detroit (DMC)

--Grand Rapids (Spectrum-Butterworth)

--Port Huron (McLaren)

Production Stats

To date, 1,484 women have been recruited in clinics across the state of Michigan. As of today, 1,038 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 mothers / live births, so there are less than 60 more participants needed to complete the sample. The main priority over the next few months is to complete recruitment of this representative MARCH sample so Mike Elliott can begin weighting process.

Prenatal Survey 1: 918

Prenatal Survey 2: 690

[Phase 2: 3-Month Data Collection Summary]

Babies born: 901
 3-month sample released: 898
 3-month interviews completed: 641
 Average attempts / lw: 7.8
 lw length: 46 min.
 Response Rate: 73%
 3-month biospecimen collected: 368

 [Phase 3: Age 4 REDCap Survey]

Age-4 sample released: 98
 REDCap surveys completed: 54
 Response Rate: 56%

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

Age-4 IPV sample released: 47
 In-person visits completed: 12
 In-person visits scheduled: 5

Data collection for the in-person visits include physical measures, biospecimen and cognitive assessment components 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

The project team continues to maintain three distinct touch points / phases (Phase 1-3), associated technical systems, and sets of study protocols. For example, we use Illume RDC, SRO Reports, custom biospecimen application, custom reports, Blaise, SurveyTrak, WebLog, WebTrak, FPRs, REDCap, Qualtrics, etc. Maintaining all of these systems used for data collection continues to be a challenge.

Cost
Sep 16, 2022

Total Cost to Date (Direct + Indirect):	423,261.75	
Estimated Cost at Completion (E\$AC):	428,839.59	
Total Budget:	427,336.00	
Variance (Budget minus E\$AC):	-1,503.59	
Reason For Variance:	Up until recently (9/16) we were projecting a ~\$20k overrun in the Year 6 ECHO budget that ended August 31, 2022. We had discussed this with the financial manager at SRC, the PIs and study office at MSU, and had determined a resolution. Although we're glad that it's much lower, the significant reduction in the overrun amount caught the PI and others by surprise.	

Projections
Sep 16, 2022

Dollars Projected For Month:	42,652.79	
Actual Dollars Used:	35,746.93	
Variance (Projected minus Actual):	6,905.86	
Reason For Variance:	We anticipated some costs moving from project year 5 to year 6 but they ended up remaining on year 5. This made our year 6 costs look higher than what they actually were. We will continue to assess our cost monitoring systems and debrief with financial analyst.	

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
Data Col Period
Security Plan
Milestone Dates

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

PreProduction Start:

Pretest End:

Staffing Completed: 03/04/2022

SS Train Start: 02/28/2022

DC Start: 04/04/2022

Pretest Start:

Recruitment Start: 01/01/2022

GIT Start: 02/26/2022

SS Train End: 03/31/2022

DC End: 08/14/2022

Other Project
Team Members:

Kirsten Alscher (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

Aug, 2022 (EDC Midline)

Project Phase

Closing

Risk Level

On Track

Monthly Update

Midline data delivery is complete. Only the summary methods report is still pending. Barb W returns to work 1/2 time and will oversee finalizing this. PIs have agreed that any Endline planning work will be charged here until Endline shortcodes are available.

Special Issues

Cost
Sep 16, 2022

Total Cost to Date (Direct + Indirect): 1,537,635.66
Estimated Cost at Completion (E\$AC): 1,596,939.65
Total Budget: 2,124,151.00
Variance (Budget minus E\$AC): 527,211.35
Reason For Variance: See previous months information - HPI much lower than budgeted.

Projections
Sep 16, 2022

Dollars Projected For Month: 176,891.63
Actual Dollars Used: 187,854.46
Variance (Projected minus Actual): -10,962.83
Reason For Variance: Labor is mostly due to Endline planning work.

Measures

	Units Complete	RR	HPI
Current Goal:	2610	87	6
Goal at Completion:	2610	87	6
Current actual:	2900	97	3
Estimate at Complete:	2900	97	3
Variance:			

Other Measures

Project Name	(EDC-SS Phases 3-4) Every Dollar Counts Semi-Structured, Phases 3-4														
Project Mode	Primary: Telephone		Secondary: Face to Face		Total of Modes: 2										
Project Type	Sponsored Projects			Project Status	Current										
Budget	Direct Budget:	314,566.00	Indirect Budget:	94,369.00	Total Budget: 408,935.00										
Principal Investigator/Client	Jessica Wiederspan (OpenResearchLab) Elizabeth Rhodes (OpenResearchLab)														
Funding Agency	OpenResearchLab														
IRB	HUM#:	HUM00164105	Period Of Approval:	1/1/2022-12/31/2022											
Project Team	Project Lead:	Karin Schneider													
	Budget Analyst:	Megan Gomez-Mesquita													
	Production Manager:	Barbara Aghababian-Homburg													
	Senior Project Advisor:	Nicole G Kirgis													
	Production Manager:														
	Production Manager:														
Proposal #:	no data														
Description:	Semi-Structured (Qualitative) interviews of a panel of respondents to the larger EDC Baseline/Midline studies. The same respondents are asked to do six qualitative interviews over the course of the three-year EDC program (1-1.5 hour iws). Phases 3 and 4 are separated by eight months. Phase 3 conducted by phone from November 2021 - January 2022. Phase 4 is planned as in-person starting in August 2022 and running through the end of the calendar year. SRO sample is 129 cases. 122 were successfully interviewed for Phase 3 (two cases are presently being confirmed by the ORL (PI) team as incarcerated or deceased). Kirsten Alcser was SPA for Phase 3.														
SRO Project Period	10/2021 - 01/2023														
Data Col Period	11/2021 - 12/2022														
Security Plan	NA														
Milestone Dates	<table><tr><td>PreProduction Start:</td><td>Pretest Start:</td></tr><tr><td>Pretest End:</td><td>Recruitment Start:</td></tr><tr><td>Staffing Completed:</td><td>GIT Start:</td></tr><tr><td>SS Train Start:</td><td>SS Train End:</td></tr><tr><td>DC Start:</td><td>DC End:</td></tr></table>					PreProduction Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
PreProduction Start:	Pretest Start:														
Pretest End:	Recruitment Start:														
Staffing Completed:	GIT Start:														
SS Train Start:	SS Train End:														
DC Start:	DC End:														
Other Project Team Members:	Ashwin Dey, Becky Loomis, Andrea Pearce, Marsha Skoman, Peter Sparks, Stephanie Windisch														
Other Project Names:	"Phase 3/4" is often referred to as "Round 3/4"														
Sample Mgmt Sys	SurveyTrak														
Data Col Tool	Blaise 4.8														
Hardware	Laptop; [UM cell] Phone														
DE Software	N/A														
QC Recording Tool	DRI-CXM														
Incentive	Yes, R														
Administration	SRO Group														
Payment Type	NA														
Payment Method	Check through other system (API through STrak to PI's payment system)														

Report Period	Aug, 2022 (EDC-SS Phases 3-4)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	Training extended into September. This is not going to have a significant impact on budget.		
Special Issues			

Cost Sep 16, 2022	Total Cost to Date (Direct + Indirect):	180,486.08
	Estimated Cost at Completion (E\$AC):	343,180.33
	Total Budget:	408,935.00
	Variance (Budget minus E\$AC):	65,754.67
	Reason For Variance:	Travel removed from workscope.

Projections Sep 16, 2022	Dollars Projected For Month:	32,330.51
	Actual Dollars Used:	28,750.15
	Variance (Projected minus Actual):	3,580.36
	Reason For Variance:	We were slightly off with projections.

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

Other Measures

Project Name	(HCAP 2022) Harmonized Cognitive Assessment Protocol, 2022													
Project Mode	Primary: Face to Face Secondary: Telephone													
Project Type	Sponsored Projects		Project Status	Current										
Budget	Direct Budget:	3,300,000.00	Indirect Budget:	1,188,000.00 Total Budget: 4,488,000.00										
Principal Investigator/Client	Kenneth Langa (SRC) David Weir (SRC)													
Funding Agency														
IRB	HUM#:	HUM00099822	Period Of Approval:											
Project Team	Project Lead:	Maureen Joan O'Brien												
	Budget Analyst:	Richard Warren Krause												
	Production Manager:	Margaret Lavanger												
	Senior Project Advisor:	Evanthia Leissou												
	Production Manager:													
	Production Manager:													
Proposal #:	no data													
Description:	<p>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 5000 respondents (one per household) who are 65 years of age or older will be selected for this effort. The questionnaire is a series of 15 cognitive tests and will be administered to respondents after the HRS 2022 interview has been completed. The sample will not be clustered geographically; it will be selected randomly. It is expected that the field team will carry out well-planned regional trips in order to complete the 3,530 in-person interviews. An informant interview will also be completed for each of the respondents interviewed.</p> <p>The respondent questionnaire length is expected to be 60 minutes. The informant questionnaire is expected to be 20 minutes and can be administered in-person after the R interview, or by telephone/mail if FTF is not available.</p>													
SRO Project Period	01/2022 - 12/2023													
Data Col Period	07/2022 - 09/2023													
Security Plan	NA													
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start:</td> <td style="padding: 5px;">Pretest Start:</td> </tr> <tr> <td style="padding: 5px;">Pretest End:</td> <td style="padding: 5px;">Recruitment Start:</td> </tr> <tr> <td style="padding: 5px;">Staffing Completed:</td> <td style="padding: 5px;">GIT Start:</td> </tr> <tr> <td style="padding: 5px;">SS Train Start:</td> <td style="padding: 5px;">SS Train End:</td> </tr> <tr> <td style="padding: 5px;">DC Start:</td> <td style="padding: 5px;">DC End:</td> </tr> </table>				PreProduction Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
PreProduction Start:	Pretest Start:													
Pretest End:	Recruitment Start:													
Staffing Completed:	GIT Start:													
SS Train Start:	SS Train End:													
DC Start:	DC End:													
Other Project Team Members:	PDMG: Tony Romanowski, Lisa VanHavermaet, 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	Aug, 2022 (HCAP 2022)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	HCAP production has been underway for 8 weeks and is going well. There are 16 lwers, 2 TLs, a PC, and a PM. 559 interviews have been completed, including 320 R and Inf. There are currently 136 appts. Of the three sample		

types, Reinterviews are completing at the highest rate, 57.1%, and represent 51.3% of the sample. Age-ins are completing at 37.7% and represent 40.5% of the sample. Recontacts, those who said no in 2016, are completing at 5.2% and represent 8.2% of the sample. The overall HPI is 4.57, already only slightly higher than it was last wave. Logging and data entry is underway. Returned test materials are entered into WEBLOG. Letter Cancellation is not scored in the field and is data entered into WEBLOG by Ann Arbor staff. Brave Man & Logical Memory story recalls are no longer scored in Blaise due to licensing issues, and are done on paper and pencil forms that were created by Ann Arbor staff. These are entered by SSAs into a Blaise Stand-alone (not Weblog) due to more detailed and extensive data entry. We are working through double data entry protocols. We are working on Logging/DE reports. QC has begun and systems (Blaise 4.8) are working smoothly with Olive now. Verification has not yet begun due to Olive programming delays which we are assured will be completed this week. A second HCAP lwer training is scheduled for Oct 16-21 and will be held at the Marriott in Ypsi. We have hired 13 OSers (incl 3 from first round), 2 more TLs, and posted for 12 NHs. We were only able to hire 8 NHs, and 2 have dropped, so we will have 6 NHs. We believe we will still have sufficient iw'ing staff but will monitor closely throughout production. We will be sharing some lwers with HRS and with CARE. The HCAP dashboard is complete and metrics from the dashboard are shared with the PIs weekly. The IRB Amendment containing Spanish materials was submitted to IRB 2 weeks ago. Also included in the amendment was updated implicit consent to record language and an increase in the TOA amount possible to pay for both Infs and Rs (a couple Infs have stated they would only participate if they could have \$50 instead of \$25). Planning for Spanish lwer training is underway. This will be done via phone for Spanish lwers.

Special Issues

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

**Cost
Sep 16, 2022**

Total Cost to Date (Direct + Indirect):	887,370.55
Estimated Cost at Completion (E\$AC):	4,331,377.37
Total Budget:	4,488,000.00
Variance (Budget minus E\$AC):	156,622.63
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
Sep 16, 2022**

Dollars Projected For Month:	338,369.22
Actual Dollars Used:	261,691.91
Variance (Projected minus Actual):	76,677.31
Reason For Variance:	TOA costs are spread evenly across months and will be updated to reflect when they are actually sent.

Measures

	Units Complete	RR	HPI
Current Goal:	490		
Goal at Completion:	7060	76%	
Current actual:	546	7.7%	4.57
Estimate at Complete:		76%	
Variance:			

Other Measures

Goals and actuals include R + Inf iws.

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 End:

Staffing Completed:

SS Train Start: 06/08/2021

DC Start: 05/28/2021

Pretest Start:

Recruitment Start:

GIT Start:

SS Train End: 06/08/2021

DC End: 06/30/2022

Other Project	Technical Leads: Ian Ogden & Jim Rodgers
Team Members:	MSMS Developers: Pam Swanson & Jim Rodgers
	Data Manager: Laura Yoder
	Project Support 1: Jeannie Baker (Replacing Becky Scherr, as of late-June, 2021)
	Project Support 2: Melissa Luker (Spring Only)
	Project Support 3: Debra Heier (Locating, Spring Only)
	Project Support 4 (RPay & Mailing-Support Only, Spring): Anna Fuqua-Smith
	Project Support 5 (RPay & Mailing-Support Only, Fall): Daniah Buageila
	Production Manager: Pooja Varma-Laughlin (Spring Only)
	Production Manager / Scheduler: Kelley Popielarz (Fall Only)
Other Project	HRS 2021 Off-Year Mail Study
Names:	HRS 2021 OYMS (COVID) / OYMSF
Sample Mgmt Sys	SRTrak & MSMS
Data Col Tool	NAS 2021 Spring COVID Survey / Fall COVID Survey
Hardware	HRS 2021 Perceptives 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	Aug, 2022 (HRS 2021 OYMS / COVID !	Project Phase	Closing
Risk Level	On Track		
Monthly Update	<p>[General]</p> <p>The remaining monthly MPR updates will be quite minimal as effectively all activity on this project concluded in early-August, 2022, but costs will not be finalized until November, 2022 (following the voiding of checks for Release 2/Fall).</p> <p>[Production & Project Closeout Status]</p> <p>Six non-blank questionnaires have been delivered since data collection has ended; per protocol, these have been mailed to SRC-HRS for further processing, and these will not be reflected in production reports (finalized as of mid-August).</p> <p>Otherwise, no updates from the 07/2022 MPR entry.</p>		
Special Issues	None.		
Cost			
Sep 14, 2022	Total Cost to Date (Direct + Indirect):	1,225,079.66	
	Estimated Cost at Completion (E\$AC):	1,160,116.37	
	Total Budget:	1,333,924.00	
	Variance (Budget minus E\$AC):	173,807.63	
	Reason For Variance:	[Unchanged from previous month.] The EAC is currently lower than the total cost to date due to projected credits for unredeemed respondent payments / checks in the future (those for the Fall, 2021 release being voided in October, 2022). Remaining projections as of 9/14/2022 amount to a credit of \$64,963.29.	
		We are currently projecting an underrun of ~\$173K. 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			
Sep 14, 2022	Dollars Projected For Month:	1,152.25	
	Actual Dollars Used:	251.36	
	Variance (Projected minus Actual):	898.89	
	Reason For Variance:	Lower than projected salary costs and associated recharges. Effectively all effort on the HRS 2021 OYMS / COVID Survey project has concluded, with small number of hours projected in November after final costs / voids hit for final cost reporting and final closeout.	

Measures

	Units Complete	RR	HPI
Current Goal:	15,700	80.0%	N/A
Goal at Completion:			
Current actual:	11,574	59.24%	
Estimate at Complete:			
Variance:			

Other Measures

Final Non-Interview Rates (as of 8/12/2022 - Final)

	n	%
NI, Final Refusal	608	3.11%
NI, Locating Exhausted	531	2.72%
NI, Other	6,824	34.93%
NS	493	2.46%

Units Completed & RR by Release (as of 8/12/2022 - Final):

	n, IW	RR
Spring	8,363	60.7%
Fall	3,211	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:	<p>The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of 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.</p>												
SRO Project Period	01/2021 - 05/2023												
Data Col Period	03/2022 - 04/2023												
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%;"> <tr> <td>PreProduction Start: 01/01/2021</td> <td>Pretest Start: 11/01/2021</td> </tr> <tr> <td>Pretest End: 11/23/2021</td> <td>Recruitment Start: 08/01/2021</td> </tr> <tr> <td>Staffing Completed: 01/15/2022</td> <td>GIT Start: 02/21/2021</td> </tr> <tr> <td>SS Train Start: 02/23/2022</td> <td>SS Train End: 03/03/2022</td> </tr> <tr> <td>DC Start: 03/07/2022</td> <td>DC End: 04/15/2023</td> </tr> </table>			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
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:	<p>Derek Dubuque (Production Manager), Theresa Camello (Production Manager), Taghreid Lovell (Production Manager), Milagros Hierro (Production Manager), Deborah Zivan (Project Manager), Andrew Hupp (Project Manager), Gary Hein (Project Manager), Erin McSpadden (Project Manager), Rebecca Gatword (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 Manager), Melissa Luker (Project Assistant), Anthony Romanowski (Project Manager), Megan Hromco (Project Assistant), Kristen Cross (Project Assistant)</p> <p>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</p>												
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	Aug, 2022 (HRS 2022 Panel)												
Project Phase	Implementing												

Risk Level

Some Concerns

Monthly Update

Projected hours, completed interview sand HPI were consistently close to goals throughout the month of August. The project team has been working on production monitoring, logging, weekly mailings (SSA and SAQ), payment and letter request processing, and testing. The project team worked on preparing for and conducting the late August training. Sixteen interviewers attended the August training. Technical development has continued with the Blaise instrument, SurveyTrak, Weblog, WebTrak, and reports. Interviewer recruitment and onboarding for the September training proceeded.

The technical team continues to work with CBS on Blaise issues impacting web panel which resulted in a workaround that allowed the project to start production on August 29. release 300 cases to MSMS on August 29 (275 sent invites to web survey, 25 moved straight to Interviewer active).

Special Issues

- Projected overrun
- Assisting interviewers to balance their screener and main interview sample to make sure goals are met.
- Release time for web panel sample into MSMS

**Cost
Sep 19, 2022**

Total Cost to Date (Direct + Indirect): 9,050,658.98
Estimated Cost at Completion (E\$AC): 16,712,986.54
Total Budget: 16,508,390.00
Variance (Budget minus E\$AC): -204,596.54
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 lwer rates for projecting lwer costs and travel projections were removed from the recruitment task. The Casic recharge rate and Field Ops rate increases, increased mileage costs for remaining interviews, and the Field lwer and SurveyTech rate increases have been updated in CRS.

**Projections
Sep 19, 2022**

Dollars Projected For Month: 855,177.75
Actual Dollars Used: 619,985.89
Variance (Projected minus Actual): 235,191.86
Reason For Variance:

In part, this month's underrun can be attributed to salary costs for both field iwers and regular staff. Rpay, travel and hosting were also under projection for the month - future projections have been adjusted accordingly.

Measures

	Units Complete	RR	HPI
Current Goal:	7357	41.9%	9.0
Goal at Completion:	16266	74.0%	9.0
Current actual:	7606	42.0%	8.29
Estimate at Complete:	16266	74.0%	9.0
Variance:	0	0	0

Other Measures

Project Name	(HRS2022-Screening) HRS 2022 - Screening				
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 2		
Project Type	Sponsored Projects		Project Status Current		
Budget	Direct Budget: 17,851,365.00	Indirect Budget: 6,426,491.00	Total Budget: 24,277,856.00		
Principal Investigator/Client	David Weir (SRC) Helen Levy (SRC) Ken Langa (SRC)				
Funding Agency					
IRB	HUM#:	Period Of Approval:			
Project Team	Project Lead:	Evanthia Leissou			
	Budget Analyst:	Richard Warren Krause			
	Production Manager:				
	Senior Project Advisor:	Nicole G Kirgis			
	Production Manager:	Andrew L Hupp			
	Production Manager:				
Proposal #:	no data				
Description:	<p>The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample.</p>				
SRO Project Period	02/2021 - 01/2024				
Data Col Period	03/2022 - 01/2024				
Security Plan	NA				
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: 04/19/2022 </td> <td style="padding: 5px;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>			PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: 04/19/2022	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: 04/19/2022	Pretest Start: Recruitment Start: GIT Start: SS Train End: 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	Aug, 2022 (HRS2022-Screening)	Project Phase	Implementing
Risk Level	Some Concerns		
Monthly Update	<p>Andrew and Eva expanded (detailed) the follow-up protocol that Andrew and Brady initially talked through.</p> <p>A document detailing the follow-up procedure can be found here. https://docs.google.com/spreadsheets/d/1aPZW0VSaYxJXAxJAR1okgYAHR1_vWyDhEj-lqvDnxro/edit#gid=0</p> <p>The TLs (and Millie and Theresa) will be monitoring to make sure cases have been coded correctly. On Monday's</p>		

Paul will pull a list of 20% of cases that have met one of the criteria to receive the adaptive follow-up protocol. Millie and Theresa will review the cases on Monday and Tuesday and note any cases they want excluded (coded improperly, a trip is currently occurring in that segment, etc.). They will provide their (potentially) amended list back to Paul. Paul will provide a list of updated values for those cases for Laura to load in SurveyTrak. Lines that are assigned to the web or phone protocols will be pulled from the laptop. Daniah will receive the web cases to pass along to DataForce. Theresa will be assigned the phone cases to reassign to a subset of field staff that are doing phone screening.

IRB: An amendment with submitted (and approved) with a NoOneHome and General Reluctance letter than the interviewer can use, along with Spanish translations of the LimitedAccessLetter-lwer, and modified web materials that could be sent to in-person first cases.

Paul has been busy creating and updating reports to monitor screening production. Paul will be creating a report that tracks how the various follow-up protocol designs are working. We will be making adjustments to how future releases are worked based on what we find.

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. These materials were used during the training in August. They also used a new agenda and tested those timings out. Both will be used during the next training in September.

Andrew and Eva will be discussing the screening goals and sample release plan. Andrew and Eva will revise in September after they see how the batch 2 release to the field has been worked. Another purpose of the review is to provide the PI with an updated cost estimate. We will detail what can be done with the remaining funds, and provide an estimate for the amount needed to do the original design.

Special Issues

Cost Sep 20, 2022

Total Cost to Date (Direct + Indirect):	4,726,457.99
Estimated Cost at Completion (E\$AC):	24,986,382.66
Total Budget:	24,277,856.00
Variance (Budget minus E\$AC):	-708,526.66
Reason For Variance:	Updating projections to be more in line with actuals from the field.

Projections Sep 20, 2022

Dollars Projected For Month:	813,128.39
Actual Dollars Used:	519,388.40
Variance (Projected minus Actual):	293,739.99
Reason For Variance:	--Staff hours in August were lower than projections by ~20% (~\$63,332).

Measures

	Units Complete	RR	HPI
Current Goal:	3,600/1,500 HHs	73%	3.0
Goal at Completion:			
Current actual:	414/418	18.6%	3.34
Estimate at Complete:			
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:	Sarah Elisa Broumand				
	Budget Analyst:	Ryan Neice				
	Production Manager:					
	Senior Project Advisor:	Stephanie A Chardoul				
	Production Manager:	Sarah Elisa Broumand				
	Production Manager:	Sarah Elisa Broumand				
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	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="width: 50%; vertical-align: top;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>				PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:					
Other Project Team Members:	<p>Project Management Team Stephanie Chardoul -- Senior Project Advisor (SPA) Sarah Broumand - Project Manager</p> <p>Programming Team Collette Keyser - Blaise Marsha Skoman - SurveyTrak Holly Ackerman - WebTrak Cheng Zhou - Sync</p> <p>HelpDesk Team Emmanuel Ellis John</p> <p>Data Manager Team Sarah E Jennie</p>					

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	Aug, 2022 (IHDS3)	Project Phase	Implementing
----------------------	-------------------	----------------------	--------------

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

Monthly Update	Continue working on finalizing the Migrant Project Data Model and Bengali translations. Concern is that clients continue to add new requirements and making changes to migrant roster design. This month, completely overhauled the Roster section of the Migrant data model to accommodate for non Root House hold members to be added.
-----------------------	--

We continue to have ST errors either launching, or finalizing lines, but still in very small numbers that seem to indicate laptop issues rather than programming issues. Clients are now setting up Windows 10 machines rather than Windows 11, since the memory proved to not be sufficient to handle the work.

Budget wise, we will be shifting some hours to provide more time for Colette to finish up translation programming.

Special Issues

Cost	Total Cost to Date (Direct + Indirect):	446,664.68
Sep 09, 2022	Estimated Cost at Completion (E\$AC):	558,996.17
	Total Budget:	559,884.53
	Variance (Budget minus E\$AC):	888.36
	Reason For Variance:	on track with the budget

Projections	Dollars Projected For Month:	19,236.58
Sep 09, 2022	Actual Dollars Used:	18,338.53
	Variance (Projected minus Actual):	898.05
	Reason For Variance:	no reasons, conserving as much time as possible.

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

Other Measures

Project Name	(MI CReSS (Year 2)) Michigan COVID-19 Recovery Surveillance Cohort Study														
Project Mode	Primary: Web		Secondary: Telephone		Total of Modes: 2										
Project Type	Sponsored Projects			Project Status	Current										
Budget	Direct Budget:	341,017.00	Indirect Budget:	88,663.00	Total Budget: 429,680.00										
Principal Investigator/Client															
Funding Agency															
IRB	HUM#:	HUM00181068	Period Of Approval:	Exempt											
Project Team	Project Lead:	Terri Ann Ridenour													
	Budget Analyst:	William Lokers													
	Production Manager:	Ruth B Philippou													
	Senior Project Advisor:	Nicole G Kirgis													
	Production Manager:														
	Production Manager:														
Proposal #:	no data														
Description:	<p>MI CReSS is a partnership between the University of Michigan School of Public Health (SPH) and the Michigan Department of Health and Human Services. It is a public health surveillance study to learn about Michiganders' experiences with COVID-19 using a representative sample of confirmed cases within the state. Using survey data, they plan to document sociodemographic inequities in COVID-19 testing, treatment, and recovery.</p> <p>SRO's involvement includes the administration of a Follow-up survey for respondents that completed a Baseline survey with the SPH team. Based on the sample information provided, we will be re-contacting approximately 3,995 respondents who have already completed (or are estimated) to complete the Baseline survey to administer the Follow-up survey.</p> <p>The Follow-up survey is estimated to be 45 minutes in length, and Respondents will be encouraged to complete the survey by web. However, SRO Interviewers will contact non-responders and conduct the interview over the telephone if the Respondents do not want to complete the survey on the web.</p>														
SRO Project Period	08/2021 - 09/2023														
Data Col Period	01/2022 - 07/2023														
Security Plan	NA														
Milestone Dates	<table><tr><td>PreProduction Start:</td><td>Pretest Start:</td></tr><tr><td>Pretest End:</td><td>Recruitment Start: 09/16/2021</td></tr><tr><td>Staffing Completed:</td><td>GIT Start:</td></tr><tr><td>SS Train Start: 11/29/2021</td><td>SS Train End: 12/02/2021</td></tr><tr><td>DC Start: 01/26/2022</td><td>DC End: 07/07/2023</td></tr></table>					PreProduction Start:	Pretest Start:	Pretest End:	Recruitment Start: 09/16/2021	Staffing Completed:	GIT Start:	SS Train Start: 11/29/2021	SS Train End: 12/02/2021	DC Start: 01/26/2022	DC End: 07/07/2023
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 Aug, 2022 (MI CReSS (Year 2)) **Project Phase** Implementing

Risk Level On Track

Monthly Update Sample replicate 8 was released last week and we are settling into a routine, monthly release of sample replicates to production.

Special Issues The request for FY21 carryforward has been initiated and the SPH Financial Manager transferred funds to SRO to cover the FY22 overrun. As a reminder, SRO's scope of work shifted to FY22 (from FY21) and, as a result, there were over \$50K in unused funds in the FY21 budget.

We also submitted an updated budget estimates for FY23, with revised sample number and other projections. One estimate included the costs to add sample Replicate 15 (estimated at 500).

Cost
Sep 15, 2022

Total Cost to Date (Direct + Indirect): 427,084.26

Estimated Cost at Completion (E\$AC): 467,599.45

Total Budget: 429,680.00

Variance (Budget minus E\$AC): -37,919.45

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 instrument updates in Blaise, cost to design, update and print the Resource Guide and the additional hard-copy reminder mailings for all 14 sample replicates).

Projections
Sep 15, 2022

Dollars Projected For Month: 37,023.63

Actual Dollars Used: 43,132.19

Variance (Projected minus Actual): -6,108.56

Reason For Variance:

This month the actuals were higher than projections due to respondent payments (HSIP gift cards issued) and the Production Manager's additional hours.

Measures

	Units Complete	RR	HPI
Current Goal:	2,154 (Rel 1-8)	80% (60%-Web/40%Tel)	2.25
Goal at Completion:		80% (60%-Web/40%Tel)	
Current actual:	1,822	69% (67%-Web/33% Tel)	4.07
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:	from 7/20/22 No CR								
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:	<p>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.</p> <p>It is based on two interconnected series of surveys using nationally representative samples:</p> <p>(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).</p> <p>(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/</p>											
SRO Project Period	04/2022 - 03/2027											
Data Col Period	04/2022 - 03/2027											
Security Plan	Yes											
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="width: 50%; text-align: center; vertical-align: top;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>				PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:						
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:											
Other Project Team Members:	<table border="0" style="width: 100%;"> <tr> <td style="width: 50%;">Hueichun Peng</td> <td style="width: 50%;">Technical Lead (WebSMS programmer)</td> </tr> <tr> <td>Brad Goodwin</td> <td>Data Management (Minako is providing support)</td> </tr> <tr> <td>Ashwin Dey</td> <td>SurveyTrak, WebTrak and MTF specific Apps. Programmer</td> </tr> <tr> <td>Kyle Goodman and Deborah Wilson</td> <td>Help Desk/Tablet support</td> </tr> </table>				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
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** Aug, 2022 (MTF Base Year 2022_27) **Project Phase** Implementing**Risk Level** On Track**Monthly Update** August 2022

- review list of changes/updates to systems, protocols for 2023

- schedule created for 2023

- review possible new tablet models - we hope to purchase new tablets for 2023 to replace the existing obsolete devices.

Special Issues**Cost****Sep 16, 2022****Total Cost to Date (Direct + Indirect):** 395,883.53**Estimated Cost at Completion (E\$AC):** 9,430,491.53**Total Budget:** 9,778,060.00**Variance (Budget minus E\$AC):** 347,568.47**Reason For Variance:**

The variance is a small. Projections have been updated based on actual costs in 2022 and using the new mileage rate.

Projections**Sep 16, 2022****Dollars Projected For Month:** 72,484.05**Actual Dollars Used:** 31,149.32**Variance (Projected minus Actual):** 41,334.73**Reason For Variance:**

Hours for one team member were charged to the incorrect MTF short code for July and August - once they are transferred the variance will be reduced.

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	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="width: 50%; text-align: center; vertical-align: top;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>			PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:				
Other Project Team Members:	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	Aug, 2022 (MTF HID 22)	Project Phase	Closing
Risk Level	On Track		
Monthly Update	Management:		

- Final data delivery is complete
- Continue to work on documentation tasks for closing the project

Technical system:

- N/A

Data Collection - Production ended in April 2022.

As of 4/30/2022: Annual Survey 2135 cases: 804 completes (37.66%), 91% completed Diary 1, 90% completed Diary 2, 85% completed Diary 3, 84% completed Diary 4, 81% completed Diary 5, 81% completed Diary 6, 79% completed Diary 7, 79% completed Diary 8, 77% completed Diary 9, 77% completed 10, 77% completed Diary 11, 78% completed Diary 12, 75% completed Diary 13, and 73% completed Diary 14.

Special Issues

Cost

Aug 31, 2022

Total Cost to Date (Direct + Indirect):	330,870.32
Estimated Cost at Completion (E\$AC):	335,004.37
Total Budget:	468,982.00
Variance (Budget minus E\$AC):	133,977.63
Reason For Variance:	This is the 4th year of the continuous study. The data collection ended in April 2022. The underrun amount is a carry over over the past 3 years. The amount will be adjusted in Sept,2022.

Projections

Aug 31, 2022

Dollars Projected For Month:	2,080.68
Actual Dollars Used:	915.05
Variance (Projected minus Actual):	1,165.63
Reason For Variance:	The data collection ended in April 2022. The project staff mainly worked on post-data collection activities. The underrun amount will be adjusted in Sept 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 Aug, 2022 (MTF Panel 2022-27) **Project Phase** Implementing

Risk Level On Track

Monthly Update Management

- Continue to monitor the data collection
- Continue to documenting Web SMS specification
- Working with the study team staff on data delivery timeline and process

- continue to work on documentation

System

- continue to work with the research team staff on reported issues
- continue to work with the SRO team staff on issues/refinement items in RLM

Data Collection

- Production started in April 2022

As of 08/31/2022: Total Sample: 17708.

Total Web completes=7865 (44.41%), Partial completes = 382 (2.16%), SAQ completes = 1493 (8.43%)

Note: Comparing to the last wave in the same production period, the RR is similar as previous wave.

Special Issues

Cost

Aug 31, 2022

Total Cost to Date (Direct + Indirect): 454,372.71

Estimated Cost at Completion (E\$AC): 3,970,136.49

Total Budget: 3,895,217.00

Variance (Budget minus E\$AC): -74,919.49

Reason For Variance:

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. SurveyTech charges were higher than projected. Some other charges are questionable and are being investigated. Project team will revisit and streamline projections for future months.

Projections

Aug 31, 2022

Dollars Projected For Month: 116,528.66

Actual Dollars Used: 123,720.64

Variance (Projected minus Actual): -7,191.98

Reason For Variance:

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. SurveyTech charges were higher than projected. Some other charges are questionable and are being investigated. Project team will revisit and streamline projections for future months.

Measures

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

Other Measures

Project Name	(PSID TAS 2021) Transition to Adulthood within its Life Course & Intergenerational Family Context												
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2										
Project Type	Sponsored Projects	Project Status	Current										
Budget	Direct Budget: 832,983.88	Indirect Budget: 466,470.97	Total Budget: 1,299,454.85										
Principal Investigator/Client	Narayan Sastry (U-M PSC SRC)												
Funding Agency	NIH												
IRB	HUM#: HUM00112629	Period Of Approval:	7/14/2021 - 7/13/202										
Project Team	Project Lead: Piotr Dworak Budget Analyst: Megan Gomez-Mesquita Production Manager: Elizabeth Ohryn Senior Project Advisor: Stephanie A Chardoul Production Manager: Daric Thorne Production Manager:												
Proposal #:	no data												
Description:	<p>TAS 2021 is the 9th Wave of TAS study, part of the PSID Suite of projects.</p> <p>Approximately 3,000 youth aged 18 – 28 years who are part of families who participate in the ongoing Panel Study of Income Dynamics (PSID) are invited to take part in a 60-minute web survey. In 2021, all respondents go through the same sequential treatment - non-responders to web survey are called as part of the non-response follow up. Respondents will be offered a up to \$100 for completing the interview which includes a \$75 base payment and possible other interventions. Phone interviews will be completed by a mix of Field and Survey Research Center Survey Services Lab (SSL) interviewers.</p>												
SRO Project Period	06/2021 - 07/2022												
Data Col Period	09/2021 - 06/2022												
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start: 05/01/2021</td> <td style="padding: 5px;">Pretest Start: 05/01/2021</td> </tr> <tr> <td style="padding: 5px;">Pretest End: 08/01/2021</td> <td style="padding: 5px;">Recruitment Start: 08/30/2021</td> </tr> <tr> <td style="padding: 5px;">Staffing Completed: 09/07/2021</td> <td style="padding: 5px;">GIT Start: 09/15/2021</td> </tr> <tr> <td style="padding: 5px;">SS Train Start: 09/30/2021</td> <td style="padding: 5px;">SS Train End: 10/01/2021</td> </tr> <tr> <td style="padding: 5px;">DC Start: 09/30/2021</td> <td style="padding: 5px;">DC End: 06/30/2022</td> </tr> </table>			PreProduction Start: 05/01/2021	Pretest Start: 05/01/2021	Pretest End: 08/01/2021	Recruitment Start: 08/30/2021	Staffing Completed: 09/07/2021	GIT Start: 09/15/2021	SS Train Start: 09/30/2021	SS Train End: 10/01/2021	DC Start: 09/30/2021	DC End: 06/30/2022
PreProduction Start: 05/01/2021	Pretest Start: 05/01/2021												
Pretest End: 08/01/2021	Recruitment Start: 08/30/2021												
Staffing Completed: 09/07/2021	GIT Start: 09/15/2021												
SS Train Start: 09/30/2021	SS Train End: 10/01/2021												
DC Start: 09/30/2021	DC End: 06/30/2022												
Other Project Team Members:													
Other Project Names:													
Sample Mgmt Sys	MSMS												
Data Col Tool	Blaise 4.8; Blaise 5												
Hardware	Laptop; Desktop; [UM cell] Phone												
DE Software	NA												
QC Recording Tool	DRI-CARI												
Incentive	Yes, R; Yes, INF												
Administration	SRO Group												
Payment Type	Check, post (75); Other (ePay)												
Payment Method	Check through other system (PSID RAPS); Other (ePay)												

Report Period	Aug, 2022 (PSID TAS 2021)	Project Phase	Closing
Risk Level	On Track		
Monthly Update	<p>TAS 2021 data collection ended in June (6/30) and all data was delivered (7/28). We are currently closing the project finances. At this point all interviewer time is reflected in the budget and we are projecting a stable overrun similar to the one projected for the past few months. The overrun is on the budget with the initial 15% decrease. We are conducting a financial analysis to compare projections to actuals and diagnose the overrun further. Some work continues on writing up the final report. We have also started discussions about TAS 2023.</p>		

Final results:

Completes: 2317 + approved partials: 51 = 2368

Non-Sample: 21

Estimated RR: $2317 + 50 / 2710 - 21 = 88.0\%$. Proposal response rate = 88.0%.

Finances: The September cost report to be the final for the project - no more charges beyond August.

Special Issues

Cost
Sep 16, 2022

Total Cost to Date (Direct + Indirect): 1,365,995.97

Estimated Cost at Completion (E\$AC): 1,371,495.57

Total Budget: 1,299,454.85

Variance (Budget minus E\$AC): -72,040.72

Reason For Variance:

In July direct overrun remains steady ~ \$45K and is a result of adding cost for in-person visits and increasing the iwer payrates.

Projections
Sep 16, 2022

Dollars Projected For Month: 4,274.65

Actual Dollars Used: 5,056.04

Variance (Projected minus Actual): -781.39

Reason For Variance:

Outstanding UPS charges were added to the last month. Otherwise the project codes are closed with exception of the time for final occ/ind coding.

Measures

	Units Complete	RR	HPI
Current Goal:	2344	88	n/a
Goal at Completion:	2344	88%	n/a
Current actual:	2368	88	n/a
Estimate at Complete:	2368	88%	n/a
Variance:			

Other Measures

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: 0.00	Total Budget: 47,456.00		
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. This project is under the PSID Core IRB.				
SRO Project Period	04/2022 - 12/2022				
Data Col Period	06/2022 - 12/2022				
Security Plan	NA				
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> PreProduction Start: 04/01/2022 Pretest End: Staffing Completed: SS Train Start: DC Start: 07/01/2022 </td> <td style="padding: 5px;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 11/30/2022 </td> </tr> </table>			PreProduction Start: 04/01/2022 Pretest End: Staffing Completed: SS Train Start: DC Start: 07/01/2022	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 11/30/2022
PreProduction Start: 04/01/2022 Pretest End: Staffing Completed: SS Train Start: DC Start: 07/01/2022	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 11/30/2022				
Other Project Team Members:	Rachel Orlowski -- PSID Core 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	Aug, 2022 (PSID23 Online Contact Upc	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	Discovered issue with form locking after suspension during the Prod Data Test -- required help from additional programmers not projected to resolve. SRO implemented new variable to track whether address was confirmed, or if updates were made. Signed off on Prod Data Test and began Prod deployment.		

SRO provided authenticated links for Prod test cases to PSID to test QR code generation on printed cards. Postcards and newsletters were printed.

Production project was created and batch 1 sample was loaded and released on 8/16. First 1,000 postcards were mailed on 8/17, all postcards were mailed by 8/26. Discovered MSMS issue on 8/22 that prevented MSMS from updating to a 1001 when a web form was completed. Problem was corrected on 8/22, and data from the first 24 completes were delivered to Mushtaq 8/22.

Production Update: 335 web forms completed between 8/22-8/30

Special Issues

Cost Sep 21, 2022	Total Cost to Date (Direct + Indirect):	47,130.01	
	Estimated Cost at Completion (E\$AC):	47,363.50	
	Total Budget:	47,456.00	
	Variance (Budget minus E\$AC):	92.50	
	Reason For Variance:	Actual programmer hours higher than projected. Project required help from additional programmers not projected. Decreased projections for management in September to account for higher programming costs.	
Projections Sep 21, 2022	Dollars Projected For Month:	6,414.75	
	Actual Dollars Used:	4,155.54	
	Variance (Projected minus Actual):	2,259.21	
	Reason For Variance:	Programmers and Management charged less than projected.	

Measures

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

Other Measures

Project Name	(PSID23) Panel Study of Income Dynamics Core 2023												
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2										
Project Type	Sponsored Projects	Project Status	Current										
Budget	Direct Budget: 5,030,748.00	Indirect Budget: 0.00	Total Budget: 5,030,748.00										
Principal Investigator/Client	Katherine McGonagle (UM-SRC-PSID) Narayan Sastry (UM-SRC-PSID) Esther Friedman (UM-SRC-PSID)												
Funding Agency													
IRB	HUM#: HUM00062417	Period Of Approval:	3/22/22-3/21/23										
Project Team	Project Lead: Rachel Anne Orłowski Budget Analyst: Ivanna Iavorska-Em Production Manager: Stacy Quisenberry Senior Project Advisor: Stephanie A Chardoul Production Manager: Daric Thorne Production Manager: Shonda R Kruger-Ndiaye												
Proposal #:	no data												
Description:	<p>The Panel Study of Income Dynamics (PSID--also 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 2023 sample size will be approx. 11,200, with approx. 9,650 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; fertility; COVID-19; 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 survey will be administered via web and telephone, with the expectation that more surveys will be completed via web than telephone (which will be a first for the study).</p> <p>During the 2023 wave, saliva samples will be collected for the first time on PSID Core. The Core interview must be completed to be eligible for saliva collection. Saliva sample participants that are eligible for collection during Core are adults related to Child Development Supplement (CDS) children but do not live with them. Interviewers will be trained on both the interview and saliva collection protocols. Both data collection efforts will be managed in the same MSMS project. The saliva collection effort has its own proposal number, budget, and MPR entry.</p> <p>The 2023 waves of CDS and the Transition into Adulthood (TAS) will follow PSID Core data collection. CDS and TAS eligibility is dependent upon completion of PSID Core.</p>												
SRO Project Period	03/2022 - 03/2024												
Data Col Period	03/2013 - 12/2023												
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start: 03/01/2022</td> <td style="padding: 5px;">Pretest Start: 10/03/2022</td> </tr> <tr> <td style="padding: 5px;">Pretest End: 10/24/2022</td> <td style="padding: 5px;">Recruitment Start: 09/19/2022</td> </tr> <tr> <td style="padding: 5px;">Staffing Completed:</td> <td style="padding: 5px;">GIT Start:</td> </tr> <tr> <td style="padding: 5px;">SS Train Start:</td> <td style="padding: 5px;">SS Train End:</td> </tr> <tr> <td style="padding: 5px;">DC Start: 03/01/2023</td> <td style="padding: 5px;">DC End: 12/31/2023</td> </tr> </table>			PreProduction Start: 03/01/2022	Pretest Start: 10/03/2022	Pretest End: 10/24/2022	Recruitment Start: 09/19/2022	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start: 03/01/2023	DC End: 12/31/2023
PreProduction Start: 03/01/2022	Pretest Start: 10/03/2022												
Pretest End: 10/24/2022	Recruitment Start: 09/19/2022												
Staffing Completed:	GIT Start:												
SS Train Start:	SS Train End:												
DC Start: 03/01/2023	DC End: 12/31/2023												
Other Project Team Members:													

Other Project Names:	PSID Core 2023
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 (Locator, Proxy)
Administration	ISR Group (PSID)
Payment Type	Check, post (Varies); Cash, post (Varies); Other (electronic, post--JP Morgan)
Payment Method	Check through other system (PSID will handle check & e-payment via RAPS); Interviewer payment of cash (reir

Report Period	Aug, 2022 (PSID23)	Project Phase	Implementing
Risk Level	<i>Some Concerns</i>		
Monthly Update	<p>For Pretest recruitment: programmed a streamlined version of the Blaise 5 preload builder instrument and updated prior SurveyTrak project. Signed off on training tech files on 8/24 and worked to sign off on production tech files by 9/1.</p> <p>Prepared for training on 9/8. Planned for recruitment (scheduled 9/8 - 9/19).</p> <p>For Pretest data collection: Began integration deployed on 8/1 and ready for configuration testing on 8/5. Discovered Blaise issues on 8/8 and diagnosed them on 8/9--related to Blaise 5.11 server set. Temporarily downgraded server to 5.10.4 (last known version without issues) on 8/10--compatible with our compiled Blaise 5.8.20 instrument. Tested a 5.11.7 test server set version received from CBS and no issues were found; planned to use 5.11.7 production version once available. Preliminary integration testing began on 8/15. Signed off on configuration testing and began team integration testing on 8/18 with INT 2 project. PSID signed off on the English CATI and web training instrument in CTT on 8/31.</p> <p>MSMS set-up programmer (Kyle) left SRO the first week of August. Able to staff another set-programmer (Pam) but she also was staffed on two other projects with fall deadlines. Pam discovered programming was not as far along as previously understood. Jeff provided additional programming help. Reprioritized the development scope for Pretest and developed contingency plans for additional testing after Pretest with field TLs and interviewers.</p> <p>Signed off on a new MSMS ODS process for the Mapping Tool on 8/12 - PSID23 will be the first MSMS project with integrated mapping. Began design discussions regarding the distribution of maps for TLs and interviewers.</p> <p>Awaiting MSMS core development: DCA sync updates needed by Pretest performance test. NAPE updates needed to spec/test project set-up of emails and texts; using a workaround for Pretest.</p> <p>Continued planning for the saliva component. Still revisiting rebudget assumptions with the Pls. Pls decided to postpone saliva collection from adults in CDS households until CDS in-person data collection. Worked on saliva sample management system and report designs.</p> <p>Began planning for production staffing. On-staff recruitment posting to be activated on 9/19. Worked with DCO management to develop appropriate staffing plan due to expected FTF requirement complexity (driven by saliva collection). DCO PMs began discussing sharing with other projects.</p>		
Special Issues	<p>MSMS core development updates to NAPE templates, display, and rules (MSMS-4823) need to be tested in advance of Production. Email/text workflow improvements are dependent upon this work's completion.</p> <p>With change in MSMS set-up programming resources, unable to develop as much as expected for Pretest. More development now planned between Pretest and Production.</p> <p>Project overrun continues to grow.</p>		
Cost Sep 23, 2022	<p>Total Cost to Date (Direct + Indirect): 210,909.09</p> <p>Estimated Cost at Completion (E\$AC): 5,115,830.88</p> <p>Total Budget: 5,030,748.00</p> <p>Variance (Budget minus E\$AC): 85,082.88</p>		

Reason For Variance:

Primarily driven by assigned vs. budgeted resources due to staff departures; adding TL involvement in pre-production; increasing the lwer II rate; and increasing programmer hours.

Note: Unable to separate Core IDC costs from Contact Update IDC costs.

Cost values only reflect Direct Costs (budgeted amt: \$5,030,748).

**Projections
Sep 23, 2022**

Dollars Projected For Month:

125,088.76

Actual Dollars Used:

111,577.65

Variance (Projected minus Actual):

13,511.11

Reason For Variance:

Mainly due to managers and programmers charging fewer hours than projected.

Note: Unable to separate Core IDC costs from Contact Update IDC costs.

Cost values only reflect Direct Costs.

Measures

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

Other Measures

BUDGET ASSUMPTIONS:

Mode of completion: 60% web & 40% CATI; Of the web completes, 38% do not require any interviewer effort.

HPI: 5.42 = CATI completes; 7.21 = web completes w/ interviewer follow-up; 10.17 = non-sample/non-iw. Additional 1.74 HPI for FTF NRFU cases.

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:	828,581.00	Indirect Budget:	464,004.00	Total Budget:	1,292,585.00																			
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:	Ivanna Iavorska-Em																							
	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	NA																								
Security Plan																									
Milestone Dates	<table><tr><td>PreProduction Start:</td><td>10/01/2021</td><td>Pretest Start:</td><td></td></tr><tr><td>Pretest End:</td><td></td><td>Recruitment Start:</td><td></td></tr><tr><td>Staffing Completed:</td><td></td><td>GIT Start:</td><td></td></tr><tr><td>SS Train Start:</td><td></td><td>SS Train End:</td><td></td></tr><tr><td>DC Start:</td><td></td><td>DC End:</td><td>12/31/2023</td></tr></table>					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
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:	Marsha Skoman--Tech Lead Raphael Nishimura--Sampling																								
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	Aug, 2022 (PSID-PR)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	Listing preload prep continued. DMSS worked with 2 UPR students to further clean the address lists. Listing Training was scheduled - Management team will be in PR 9/29-10/4 for Training. In person collaboration meeting scheduled with ETI for 10/3. Hotel and travel arrangements were booked. These plans were subsequently cancelled following Hurricane Fiona. We hope to reschedule ~3wks out.		

CMT signed off on use of the Field Maps application on PR students' cell phones. SRO will need to provide students with cell phone security instructions. Tech development continued – finalized ELP columns and QR code programming. In early September we learned that PR PIs were assuming segments could be listed by multiple students working simultaneously. The production segments were reviewed in more detail by additional team members and found to be extremely complex, which is why the PR team imagined working them as a team might be necessary. The Tech Team decided to load the sample at the block-, rather than the segment-level, so that blocks could be assigned to various listers.

PR collaborators tested Field Maps in PR and noted that the app caused significant battery drain. SRO investigating options to decrease battery usage.

Study received additional funding from the Russell Sage Foundation -- funding will all go to ETI. PIs working to establish ETI funding arrangement. SRO investigated options for Human Subjects Training in Spanish for PR collaborators.

PSID PR in discussion with PSID Core to determine the instrument development and Pretest timelines. PIs plan to conduct cognitive testing of new RSJ items, specifically skin color items.

Special Issues

Work scope for Spanish translations was underbudgeted (U-M, non-SRO budget). Spanish Core 2023 instrument will not be ready in time for a pretest this year.

Cost Sep 20, 2022

Total Cost to Date (Direct + Indirect):	78,582.16
Estimated Cost at Completion (E\$AC):	1,286,233.53
Total Budget:	1,292,585.00
Variance (Budget minus E\$AC):	6,351.47
Reason For Variance:	Projected underrun decreased from 20K last month to 4K direct cost this month as project increased projections in tech and management categories.

Projections Sep 20, 2022

Dollars Projected For Month:	32,422.06
Actual Dollars Used:	24,826.76
Variance (Projected minus Actual):	7,595.30
Reason For Variance:	Actuals for programmers and management were less than projected

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#:*** HUM00216780 ***Period Of Approval:*** N/A--Exempt

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

Proposal #: no data

Description: The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations.

The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 600 interviews.

SRO Project Period 12/2021 - 12/2022

Data Col Period 01/2022 - 12/2022

Security Plan NA

Milestone Dates

<i>PreProduction Start:</i>	<i>Pretest Start:</i>
<i>Pretest End:</i>	<i>Recruitment Start:</i>
<i>Staffing Completed:</i>	<i>GIT Start:</i>
<i>SS Train Start:</i>	<i>SS Train End:</i>
<i>DC Start:</i> 12/27/2021	<i>DC End:</i> 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 Aug, 2022 (SCA 2022) **Project Phase** Implementing

Risk Level On Track

Monthly Update SCA AUG22 began as scheduled on WED July 27, and ended as scheduled on MON August 22. We completed 602 (321/181/100) IWs for the month (exceeding the monthly goals of 600:320/180/100 by 2 IWs) - at a cumulative HPI of 3.08 (0.08 above the budgeted goal of 3.0). 12 OSers were trained on SCA from 7/25-7/27 and as expected their higher than project average HPI accounts for the .08 above budgeted HPI for the month.

Special Issues

Cost Sep 16, 2022	<i>Total Cost to Date (Direct + Indirect):</i>	793,790.56	
	<i>Estimated Cost at Completion (E\$AC):</i>	1,230,325.66	
	<i>Total Budget:</i>	1,251,758.00	
	<i>Variance (Budget minus E\$AC):</i>	21,432.34	
	<i>Reason For Variance:</i>	Overall lower than budgeted HPI for the year.	

Projections Sep 16, 2022	<i>Dollars Projected For Month:</i>	94,416.10	
	<i>Actual Dollars Used:</i>	107,916.82	
	<i>Variance (Projected minus Actual):</i>	-13,500.72	
	<i>Reason For Variance:</i>	Increase in ST rates.	

Measures

	Units Complete	RR	HPI
<i>Current Goal:</i>	600		3.0
<i>Goal at Completion:</i>	600		3.0
<i>Current actual:</i>	602		3.08
<i>Estimate at Complete:</i>	602		3.08
<i>Variance:</i>	+2		,08

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	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start: 08/15/2021</td> <td style="padding: 5px;">Pretest Start:</td> </tr> <tr> <td style="padding: 5px;">Pretest End:</td> <td style="padding: 5px;">Recruitment Start:</td> </tr> <tr> <td style="padding: 5px;">Staffing Completed:</td> <td style="padding: 5px;">GIT Start:</td> </tr> <tr> <td style="padding: 5px;">SS Train Start:</td> <td style="padding: 5px;">SS Train End:</td> </tr> <tr> <td style="padding: 5px;">DC Start: 10/13/2021</td> <td style="padding: 5px;">DC End: 12/15/2021</td> </tr> </table>			PreProduction Start: 08/15/2021	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start: 10/13/2021	DC End: 12/15/2021
PreProduction Start: 08/15/2021	Pretest Start:												
Pretest End:	Recruitment Start:												
Staffing Completed:	GIT Start:												
SS Train Start:	SS Train End:												
DC Start: 10/13/2021	DC End: 12/15/2021												
Other Project Team Members:	Maureen O'Brien - Project Lead, application programming, sample loading, questionnaire distribution Minako Edgar - Sample prep, data management, data delivery, GIS analysis Raphael Nishimura - Weighting Carl Remmert - budget support analyses												
Other Project Names:													
Sample Mgmt Sys	Project specific system (Qualtrics)												
Data Col Tool	Other (Qualtrics)												
Hardware	NA												
DE Software	N/A												
QC Recording Tool	N/A												
Incentive	Yes, R												
Administration	NA												
Payment Type	Other (Amazon)												
Payment Method	Other (via Email)												

Report Period	Aug, 2022 (SCIP 2021)	Project Phase	Closing
Risk Level	On Track		
Monthly Update	The Data Manager did a small amount of work on the final data files for the PIs.		
Special Issues			

Cost

Total Cost to Date (Direct + Indirect): 82,490.19
Estimated Cost at Completion (E\$AC): 83,074.26
Total Budget: 126,000.00
Variance (Budget minus E\$AC): 42,925.74
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

Dollars Projected For Month: 0.00
Actual Dollars Used: 584.07
Variance (Projected minus Actual): -584.07
Reason For Variance: Not all hours needed

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	(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:	<p>This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.</p> <p>For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data.</p> <p>To date, we have completed 2 waves of STARRS-LS interviewing. During Wave 1, we attempted to contact 50,000 individuals and completed approximately 14,500 full interviews. All Wave 1 participants that completed a full Wave 1 interview were asked to participate in Wave 2. Waves 3 and 4, which are covered in this application, will include the full STARRS-LS Wave 2 sample, regardless of whether they completed the interview.</p> <p>In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys).</p>					
SRO Project Period	05/2020 - 04/2025					
Data Col Period	11/2020 - 10/2024					
Security Plan	Yes					
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> PreProduction Start: 04/01/2020 Pretest End: Staffing Completed: 10/01/2020 SS Train Start: 11/18/2020 DC Start: 11/09/2020 </td> <td style="width: 50%; vertical-align: top;"> Pretest Start: Recruitment Start: 07/23/2020 GIT Start: SS Train End: 11/24/2020 DC End: 11/03/2022 </td> </tr> </table>				PreProduction Start: 04/01/2020 Pretest End: Staffing Completed: 10/01/2020 SS Train Start: 11/18/2020 DC Start: 11/09/2020	Pretest Start: Recruitment Start: 07/23/2020 GIT Start: SS Train End: 11/24/2020 DC End: 11/03/2022
PreProduction Start: 04/01/2020 Pretest End: Staffing Completed: 10/01/2020 SS Train Start: 11/18/2020 DC Start: 11/09/2020	Pretest Start: Recruitment Start: 07/23/2020 GIT Start: SS Train End: 11/24/2020 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	Aug, 2022 (STARRS-LS Waves 3 & 4)	Project Phase	Implementing
----------------------	-----------------------------------	----------------------	--------------

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

Monthly Update	<p>Project Management and Planning:</p> <ul style="list-style-type: none"> <input type="checkbox"/> James attended the IPR Follow-on Discussion with the GSC Executive Council (Part 2) on August 8 and the STARRS-LS IPR on August 30. <input type="checkbox"/> We sent weekly production updates to the PIs, and reported on progress on the call with the Army/M&RA. <input type="checkbox"/> Meredith created the agenda/notes and facilitated the weekly meeting with the STARRS program managers. <input type="checkbox"/> We carried out bi-weekly meetings with M&RA to coordinate Safety Plan and respondent locating activities. <input type="checkbox"/> We awaited decisions/approval from the GSC on the budget for adding the biosample flags, administrative variables and inventory document to the ICPSR public holdings. <input type="checkbox"/> We participated in discussions with the research team and PIs about plans for STARRS beyond Wave 4. <input type="checkbox"/> We continued to work on resolving the security hold on the Year 3 subaward which was put in place due to new security requirements included in the award language [U-M to certify that we meet NIST 800-171 in accepting Controlled Unclassified Information (CUI)]. <ul style="list-style-type: none"> <input type="checkbox"/> HJF was not able to modify the prime award, but they provided email confirmation that no CUI would be passed between HJF and U-M. This was enough to satisfy the U-M ORSP requirements and they removed the security hold on August 11. <input type="checkbox"/> The NIST 800-171 requirement language was still present in the contract, however, the STARRS system and processes already meet 800-171r2 and our Enclave IT team had updated the security documentation to demonstrate compliance. <input type="checkbox"/> The agreement was fully executed on August 19. The Project/Grant (P/G) number and Wave 3 account codes were available August 30. We requested a Wave 4 sub-P/G and account codes, but these will not be available until sometime in September. <input type="checkbox"/> Given accounts were not available in time for August timesheets and expenses, August staff hours and costs (in addition to July) were placed on an SRO overhead account and will be moved once the Year 3 award and accounts are in place. As a result, we will not be able to accurately report on updated costs until those charges are moved onto the appropriate account. <input type="checkbox"/> IRB: We made plans for another amendment, which will be submitted in early September. <p>Enclave and User Support:</p> <ul style="list-style-type: none"> <input type="checkbox"/> We worked with M&RA to provide information related to the renewal process for the DHA Data Use Agreements. It was first thought that a HIPAA Safeguard Review (HSR) process would need to be completed, but later we learned that the process was not applicable to the U-M Enclave because U-M has never received any data (medical or otherwise) with true SSNs or other direct PII. That is removed by AAG before delivery to us or replaced with fabricated IDs. <input type="checkbox"/> Annual Security Controls Review: U-M worked with AAG to address remaining steps needed for the controls review. AAG stated they would move forward with the 2021 IA approval. <input type="checkbox"/> Annual NDI data request: We awaited the Inter-Agency Agreement (IAA) to provide funding to be established by M&RA. <input type="checkbox"/> Standard Enclave activities continued. These include maintaining security requirements; processing background checks and Great Lakes Cluster user access requests, drop box requests, ID swap and data transfer requests; managing software acquisition and updates; and providing user support as needed. Of particular note this month: <ul style="list-style-type: none"> <input type="checkbox"/> We received 23 construct file from Harvard via AAG, carried out processing, and made them available on the UM-STARRS Data Enclave on August 25. <input type="checkbox"/> We completed our work assisting a USUHS researcher with a question about locating RESPIDs corresponding to SHOS-A IDs of suicide attempt cases who completed a qualitative interview with Harvard. The ID file and
-----------------------	---

documentation were posted to the Enclave on August 9.

- o We continued work on a document outlining data linkage tracking, procedures, and guidelines for incoming data with new, data-specific consent requirements (HIPAA). Draft versions were circulated internally and sent to Paul for questions/feedback.
- o We worked to define a request from Dr. Ursano for counts of blood samples by survey data collection (i.e. AAS, NSS, PPDS, SHOS-A, LS1, LS2) for the Army STARRS participants, the STARRS-LS cohort and respondents with data at ICPSR. We exchanged drafts and discussed with Paul.
- o Hardware/software:
 - Server hardware replacement for the Windows infrastructure is underway with a target completion date of September 27.
 - We received and began work on two new biomarker group requests for assistance in August:
 - o Request to transfer PTSD Case/Control flag data to Dr. Wilkerson at USUHS.
 - o Request to transfer PRS data from Great Lakes Cluster to the Enclave.

Public Use Data:

- Fall VA Cyber Seminar (September 7, 2022 at 11 am):
 - o PI and M&RA reviews of the presentation slides were completed. Final slides were sent to all parties, including Diana Monday, on August 15.
- Budget for the ICPSR-related activities - biosample flags, admin variables, and inventory document: See the Project Management and Planning section.
- We awaited decisions from the Army/GSC on producing the genetic and bioassay files for public use and placing data in the NIH National Data Archive and Public use release for GWAS.

Wave 3 Progress and Updates:

- Wave 3 production statistics, as of September 6, 2022, are as follows:
 - o Replicates released: 14 out of 14 with a total of 14,514 sample lines, which includes 28 SHOS-A cases who agreed to participate in LS Wave 3.
 - o Completed interviews: 10,819 (9,890 Web, 929 CATI)
 - o The response rate for completed replicates is currently 76.9%
 - Replicate 13 was completed in July. The final Replicate 13 response rate was 75.0%, which is higher than the previous two replicates' final rates (Rep 1 - 72.7% and Rep 12 - 72.8%).
 - Replicate 14 moved into Phase 3 on August 31. As of September 6, the response rate was 42.1% and tracking at the same rate as replicate 13 at this point in the protocol.

Safety Plan Results:

- The Wave 3 Safety Plan rate is 11.8% as of September 6, as shown in Table 3 below.

Wave 4 Planning and Progress:

- Wave 4 survey programming and testing continued. CATI version programming began.
- We worked closely with Harvard on steps needed in order to create the Wave 4 preload.
- Sample management programming and testing continued.
- We continued to define procedures for interview quality control.
- We continued planning for Wave 4 trainings of data collection staff.
- o We will train 6-7 team leaders at the end of October and around 22 interviewers mid-November.
- We began reviewing and updating training manuals, training videos and home study materials.

Special Issues

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

□ The Year 3 subaward was issued June 14, but held up at U-M ORSP due to new security requirements included in the award language. The issues were resolved and the agreement finally fully executed on August 19. From that date, it will take about three more weeks for the full set of Project/Grant numbers and account codes to be set up and available for SRO staff to charge time and expenses. In total, it will have taken 3 months to resolve the issues related to the Year 3 subaward. The immediate risk of having to stop work has been mitigated, but the delay has resulted in disturbances to the regular cost reporting cycle (we have not been able to monitor July or August costs like we normally do), additional work for staff who have to move hours placed on overhead accounts to Year 3 accounts, and increased administrative burden for creating alternate cost views, moving charges, etc. To avoid this from happening in the future, if and when there are significant changes to requirements (or the risk for new or different interpretations of requirements), we need advance notice so that we can plan to either meet the new requirements or resolve misunderstandings about them well ahead of the end of the current award in place.

□ 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. If the first few replicates of Wave 4 yield lower than expected response rates, we may 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).

□ To date, our projected costs for Waves 3 and 4 have been higher than anticipated. Contributions to increased cost estimates included 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 due to higher than expected inflation. The projected overrun has decreased in recent months due to lower than projected interviewer hours and reduced telephone charges due to a return to the physical telephone facility. 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.

□ 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 4 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
Jun 30, 2022

Total Cost to Date (Direct + Indirect):	5,219,829.41
Estimated Cost at Completion (E\$AC):	12,905,891.91
Total Budget:	12,809,390.00
Variance (Budget minus E\$AC):	-96,501.91

Reason For Variance:

Reported costs are from June 2022

Monthly expenses for July 2022 are not available given the delay in setting up the Year 3 subaward. There were new security requirements included in the award language, which were not applicable to the agreement between HJF and U-M. These needed to be addressed and resolved before U-M ORSP could sign the agreement. (See additional details in Monthly Updates, Project Management and planning section). July and August staff hours and costs were placed on the Financial Group's overhead account and will be moved once the Year 3 award and accounts are in place. We hope to have all the updates to timesheets and expense reports in time for the September cost report.

Projections
Jun 30, 2022

Dollars Projected For Month:

254,002.78

Actual Dollars Used:

215,063.28

Variance (Projected minus Actual):

38,939.50

Reason For Variance:

Measures

	Units Complete	RR	HPI
Current Goal:		83.8	8.9
Goal at Completion:		83	8
Current actual:		76.9	10.0
Estimate at Complete:		78	10
Variance:		5	-2

Other Measures

Survey Research Operations

Monthly Project Report

Development Initiative and No Data Collection Projects

August 2022



Developmental Initiatives

TSME-SRO SYS MAINTENANCE-GENERAL

TSME23-DCO Tech System Support 2023

TSME23-PIPPA 2.0 FY23

TSME23-QC-Systems

TSME23-Self-Scheduling Interface for MSMS

Developmental/Initiative Projects Dashboard

NonArchived Development Initiative and No-DataCol Projects											
Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
TSME SRO SYS MAINTENANCE- GENERAL(483910)	Initiatives	Implementing	Jeffrey L Smith	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TSME23 DCO Tech System Support FY2023	Initiatives	Implementing	Vivienne Y Outlaw	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TSME23-PIPPA	Initiatives	Implementing	Mark Simonson	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TSME23-QC-Systems (483249)	Initiatives	Implementing	Sarah Elisa Broumand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TSME23-SelfSchedUI (483424)	Initiatives	Planning	Andrew L Hupp	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Project Name	(TSME SRO SYS MAINTENANCE-GENERAL(483910)) TSME SRO SYS												
Project Mode	MAINTENANCE-GENERAL(483910)												
Project Type	Developmental Initiatives	Project Status	Current										
Budget	Direct Budget: 20,000.00	Indirect Budget: 0.00	Total Budget: 20,000.00										
Principal Investigator/Client													
Funding Agency													
IRB	HUM#:	Period Of Approval:											
Project Team	Project Lead:	Jeffrey L Smith											
	Budget Analyst:	Ivanna Iavorska-Em											
	Production Manager:												
	Senior Project Advisor:	Gregg Peterson											
	Production Manager:												
	Production Manager:												
Proposal #:	no data												
Description:	This project will be used to support all maintenance/enhancements needs for applications or systems directly to the SurveyTrak production database which would include Surveytrak, ST Administration, SRS RT, and RCLS to name a few.												
SRO Project Period	07/2022 - 06/2023												
Data Col Period													
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start:</td> <td style="padding: 5px;">Pretest Start:</td> </tr> <tr> <td style="padding: 5px;">Pretest End:</td> <td style="padding: 5px;">Recruitment Start:</td> </tr> <tr> <td style="padding: 5px;">Staffing Completed:</td> <td style="padding: 5px;">GIT Start:</td> </tr> <tr> <td style="padding: 5px;">SS Train Start:</td> <td style="padding: 5px;">SS Train End:</td> </tr> <tr> <td style="padding: 5px;">DC Start:</td> <td style="padding: 5px;">DC End:</td> </tr> </table>			PreProduction Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
PreProduction Start:	Pretest Start:												
Pretest End:	Recruitment Start:												
Staffing Completed:	GIT Start:												
SS Train Start:	SS Train End:												
DC Start:	DC End:												
Other Project	Ashwin Dey												
Team Members:	Pam Swanson												
	Marsha Skoman												
	Holly Ackerman												
	Darnell Christian												
Other Project	Sys Maint General												
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	Aug, 2022 (TSME SRO SYS MAINTEN	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	Meetings (attended by Ashwin, Marsha, Pam Jeff and Holly) -PowerBuilder -Respondent Payment meetings Hrs. Staff Task(s) 02- Holly (Meetings) 02- Ashwin (Meetings) 02- Pam (Meeting)		

02- Jeff (Meetings)
 15.5 Marsha
 -Updated ST Demo and GIT projects
 -Added new column to tCallinformation to Plan B database
 - Issues with RCLS & 1-800
 - ST Planner bug

Special Issues

Cost

<i>Total Cost to Date (Direct + Indirect):</i>	20,000.00
<i>Estimated Cost at Completion (E\$AC):</i>	0.00
<i>Total Budget:</i>	20,000.00
<i>Variance (Budget minus E\$AC):</i>	0.00
<i>Reason For Variance:</i>	

Projections

<i>Dollars Projected For Month:</i>	0.00
<i>Actual Dollars Used:</i>	0.00
<i>Variance (Projected minus Actual):</i>	0.00
<i>Reason For Variance:</i>	

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

Other Measures

Project Name (TSME23 DCO Tech System Support FY2023) TSME23-DCO Tech System Support (483248) 2023

Project Mode Primary: Not Available

Project Type Developmental Initiatives **Project Status** Current

Budget *Direct Budget:* 35,000.00 *Indirect Budget:* 0.00 *Total Budget:* 35,000.00

Principal Investigator/Client

Funding Agency

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

Project Team *Project Lead:* Vivienne Y Outlaw

Budget Analyst: Carl S Remmert

Production Manager:

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 07/2022 - 06/2023

Data Col Period

Security Plan NA

Milestone Dates

PreProduction Start:

Pretest End:

Staffing Completed:

SS Train Start:

DC Start:

Pretest Start:

Recruitment Start:

GIT Start:

SS Train End:

DC End:

Other Project Max Malhotra

Team Members: Shaowei Sun

Other Project

Names:

Sample Mgmt Sys NA

Data Col Tool NA

Hardware NA

DE Software NA

QC Recording Tool NA

Incentive NA

Administration NA

Payment Type NA

Payment Method NA

Report Period Aug, 2022 (TSME23 DCO Tech System **Project Phase** Implementing

Risk Level On Track

Monthly Update

- Start production for the new Iwer Self Scheduling appointment module. This module includes 2 systems: one public facing portal for iwers to schedule an appt with DCO Staff; an Administration system for DCO Staff to manage the workflow, process and monitor the appointment activities.
- Continue to work on the new Iwer Website on WordPress with CMT.
- Met to touch base on the FOTY 2023 revision and work scope.
- Roll out the new Vacation Status programming.

Special Issues

Cost Sep 09, 2022	Total Cost to Date (Direct + Indirect):	16,734.00
	Estimated Cost at Completion (E\$AC):	27,609.74
	Total Budget:	35,000.00
	Variance (Budget minus E\$AC):	7,390.26
	Reason For Variance:	x

Projections Sep 09, 2022	Dollars Projected For Month:	6,151.31
	Actual Dollars Used:	10,741.86
	Variance (Projected minus Actual):	-4,590.55
	Reason For Variance:	x

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

Other Measures

Project Name	(TSME23-PIPPA) PIPPA 2.0 (425198) FY23				
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:	Mark Simonson			
	Budget Analyst:				
	Production Manager:				
	Senior Project Advisor:				
	Production Manager:				
	Production Manager:				
Proposal #:	no data				
Description:	PIPPA application on the ODS Server				
SRO Project Period	01/1996 - 01/1996				
Data Col Period					
Security Plan	NA				
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center; padding: 5px;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="text-align: center; padding: 5px;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>			PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:				
Other Project Team Members:	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	Aug, 2022 (TSME23-PIPPA)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	FY 23 planning information in Google doc: PIPPA_Phase2_System Requirements and Specification https://docs.google.com/document/d/1PkjZTHXeVH4y5nBE9NriLKzxqVRBdKmhSt9-l9wzPoE/edit?usp=sharing This document is being reviewed by Grant Benson. Once final specifications are approved, development will move forward.		
Special Issues			

Cost
Sep 16, 2022

Total Cost to Date (Direct + Indirect): 3,233.55
Estimated Cost at Completion (E\$AC): 11,102.48
Total Budget: 10,000.00
Variance (Budget minus E\$AC): -1,102.48
Reason For Variance: Resources not available

Projections
Sep 16, 2022

Dollars Projected For Month: 1,259.46
Actual Dollars Used: 1,662.51
Variance (Projected minus Actual): -403.05
Reason For Variance: Resources not fully available

Measures

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

Other Measures

Project Name (TSME23-QC-Systems (483249)) TSME23-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: Shonda R Kruger-Ndiaye

Production Manager:

Production Manager:

Proposal #: no data

Description: Project used to maintain and further develop Current QC systems such as OLIVE

SRO Project Period 07/2022 - 06/2023

Data Col Period

Security Plan NA

Milestone Dates

PreProduction Start:

Pretest End:

Staffing Completed:

SS Train Start:

DC Start:

Pretest Start:

Recruitment Start:

GIT Start:

SS Train End:

DC End:

Other Project

Team Members:

Other Project

Names:

Sample Mgmt Sys NA

Data Col Tool NA

Hardware NA

DE Software NA

QC Recording Tool NA

Incentive NA

Administration NA

Payment Type NA

Payment Method NA

Report Period Aug, 2022 (TSME23-QC-Systems (483: **Project Phase** Implementing

Risk Level On Track

Monthly Update Waiting for cost report data to be available to comment on the status. August was mostly focused on fixing bugs as they came up. Also worked on specifications and estimate for new feature requested by Sarah Crane and Elizabeth Ohryn, they would like some questions to be displayed on the last page to allow evaluators to rate different aspects of the Interview itself and Respondent behavior towards the survey.

Special Issues

Cost	<i>Total Cost to Date (Direct + Indirect):</i>	0.00
Aug 31, 2022	<i>Estimated Cost at Completion (E\$AC):</i>	0.00
	<i>Total Budget:</i>	30,000.00
	<i>Variance (Budget minus E\$AC):</i>	0.00
	<i>Reason For Variance:</i>	

Projections	<i>Dollars Projected For Month:</i>	0.00
Aug 31, 2022	<i>Actual Dollars Used:</i>	0.00
	<i>Variance (Projected minus Actual):</i>	0.00
	<i>Reason For Variance:</i>	

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

Other Measures

Project Name (TSME23-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: Ivanna Iavorska-Em
Production Manager:
Senior Project Advisor: Shonda R Kruger-Ndiaye
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 07/2022 - 12/2022

Data Col Period

Security Plan NA

Milestone Dates

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

Other Project Andrew Piskorowski - writing stored procedure to summary all appointments

Team Members: Mark Simonson - possible manager interface for entering management parameters
 Peter Sparks - Blaise Developer (R facing page)
 James Rodgers - consultant as needed for MSMS

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 Aug, 2022 (TSME23-SelfSchedUI (483424)) **Project Phase** Planning

Risk Level On Track

Monthly Update Andrew H. met with Mark and Andrew P. to discuss the design in July. Andrew met with the budget analyst and is in the process of revising the projections. Andrew H met with the PSID team and the SPA in August to update them and get feedback.

The current plan is PSID will use the current (used in 2021) self-scheduler for the pretest. The upcoming work

should be completed after the pretest to allow for PSID integration testing prior to their production launch.

Andrew H. and Andrew P. (and Mark S. as necessary) will meet in September to begin the work.

Special Issues

Cost

<i>Total Cost to Date (Direct + Indirect):</i>	0.00
<i>Estimated Cost at Completion (E\$AC):</i>	10,000.00
<i>Total Budget:</i>	10,000.00
<i>Variance (Budget minus E\$AC):</i>	0.00
<i>Reason For Variance:</i>	

Projections

<i>Dollars Projected For Month:</i>	0.00
<i>Actual Dollars Used:</i>	0.00
<i>Variance (Projected minus Actual):</i>	0.00
<i>Reason For Variance:</i>	No variance in July. No time projected or worked.

Measures

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

Other Measures