

# ***Survey Research Operations***

## ***Monthly Project Report***

***Sponsored***

***July 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) Survey on Crypto-Asset Adoption and Use  
 (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  
 (VCT) Video Communication Technologies in Survey Data Collection

## Sponsored Projects Dashboard

### NonArchived Sponsored Projects

Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr	May	Jun	Jul
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	Sponsored	Implementing	Piotr Dworak	□	□	□	□	□	□	●
ECHO (Year 6)	Sponsored	Implementing	Terri Ann Ridenour	●	●	●	●	●	●	●
EDC Midline	Sponsored	Initiation	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	Initiation	Gina-Qian Yang Cheung	□	□	□	●	●	●	●
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	Initiation	Camila Kendall	□	□	□	●	●	●	●
PSID-PR	Sponsored	Implementing	Shonda R Kruger-Ndiaye	□	□	□	●	●	●	●
SCA 2022	Sponsored	Initiation	Theresa Camelo	●	●	●	●	●	●	●
SCIP 2021	Sponsored	Closing	Maureen Joan O'Brien	●	●	●	●	●	●	●
STARRS-LS Waves 3 & 4	Sponsored	Implementing	Meredith A House	●	●	●	●	●	●	●
VCT	Sponsored	Closing	Andrew L Hupp	●	●	●	●	●	●	●

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, Kallan Larsen, Lloyd F Hemingway, Jim Rodgers, Colette Keyser, Deb Wilson, Wen Chang

**Other Project**  
**Names:**

During the budget proposal stage this project was known as 'A More Efficient Web-Based Approach to Collecting National Family, Fertility and Reproductive Health Data'.

**Sample Mgmt Sys**

MSMS

**Data Col Tool**

Blaise 5

**Hardware**

Desktop

**DE Software**

Other (Blaise 5 (for Mail questionnaires)); External vendor (TBD)

**QC Recording Tool**

N/A

**Incentive**

Yes, R

**Administration**

SRO Group

**Payment Type**

Check, post (Modules 1 - \$20, Module 2 - \$20 and Module 3 - \$30); Cash, prepaid (Screener IW - \$2 Potentially

**Payment Method**

Check through STrak RPay System; Check through other system (Info. from MSMS and transfer information via

**Report Period**

July, 2022 (AFHS)

**Project Phase**

Closing

**Risk Level**

On Track

**Monthly Update**

July 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**

**Total Cost to Date (Direct + Indirect):** 2,518,913.09

**Estimated Cost at Completion (E\$AC):** 2,518,913.09

**Total Budget:** 2,490,133.00

**Variance (Budget minus E\$AC):** -28,780.09

**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**

**Dollars Projected For Month:** 0.00  
**Actual Dollars Used:** 79.19  
**Variance (Projected minus Actual):** -79.19  
**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
<b>Current Goal:</b>	2000 (main IWs)	33.3%	NA
<b>Goal at Completion:</b>	4000	33.3%	NA
<b>Current actual:</b>	2369	64%	NA
<b>Estimate at Complete:</b>	2369	64%	NA
<b>Variance:</b>	1631	+21% (see below)	NA

**Other Measures**

<b>Project Name</b>	(AFHS-Additional work) American Family Health Study - additional work				
<b>Project Mode</b>	Primary: Web	Secondary: Mail	Total of Modes: 3		
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current	
<b>Budget</b>	<b>Direct Budget:</b>	50,265.00	<b>Indirect Budget:</b>	0.00	<b>Total Budget:</b> 50,265.00
<b>Principal Investigator/Client</b>	Brady West (SRC)				
<b>Funding Agency</b>	Internal UM sequestering funds				
<b>IRB</b>	<b>HUM#:</b>	HUM00167171	<b>Period Of Approval:</b>		
<b>Project Team</b>	<b>Project Lead:</b>	Rebecca Gatward			
	<b>Budget Analyst:</b>	Dean E Stevens			
	<b>Production Manager:</b>	Lloyd Fate Hemingway			
	<b>Senior Project Advisor:</b>	Grant D Benson			
	<b>Production Manager:</b>				
	<b>Production Manager:</b>				
<b>Proposal #:</b>	no data				
<b>Description:</b>	<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** July, 2022 (AFHS-Additional work) **Project Phase** Implementing

**Risk Level** On Track

**Monthly Update** July updates  
 -Panel Feasibility Survey  
 by 7/28, 730 Rep 2 participant completed the panel feasibility survey (RR 54.2%). The mail reminder was sent by DataForce on Tuesday (7/19) to 668 nonresponders.  
 We provided a data schema to DataForce for the paper survey data and they provided a sample data file for testing. Colette and Laura got the process set-up and tested. Colette found an item that needed fixing to require the rules to not run multiple times. The update to the production data model was made and updated.  
 DataForce began to receive returned paper surveys (4 as of 7/27). They began scanning them and a first data delivery is scheduled for 8/3.  
 -NonR follow-up  
 The NY interviewer has now made contact attempts at 10 (of ~20) addresses and was able to talk to someone at seven addresses - in most cases the letters had been thrown away without opening them - they weren't interested. The CA interviewer made contact attempts at five addresses.

#### Special Issues

**Cost**  
**Aug 14, 2022**

<b>Total Cost to Date (Direct + Indirect):</b>	28,105.08
<b>Estimated Cost at Completion (E\$AC):</b>	50,976.55
<b>Total Budget:</b>	50,265.00
<b>Variance (Budget minus E\$AC):</b>	-711.55
<b>Reason For Variance:</b>	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.

**Projections**  
**Aug 14, 2022**

<b>Dollars Projected For Month:</b>	9,721.98
<b>Actual Dollars Used:</b>	11,388.53
<b>Variance (Projected minus Actual):</b>	-1,666.55
<b>Reason For Variance:</b>	Response was higher than estimated so Respondent payments were higher -

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

#### Other Measures

<b>Project Name</b>	(BFY) Baby's First Years			
<b>Project Mode</b>	Primary: Face to Face      Total of Modes: 1			
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current
<b>Budget</b>	<b>Direct Budget:</b>	4,835,227.00	<b>Indirect Budget:</b>	1,896,803.00 <b>Total Budget:</b> 6,732,030.00
<b>Principal Investigator/Client</b>	Dr. Greg Duncan (University of California - Irvine) Dr. Kimberly Noble (Teachers College Columbia University) Dr. Katherine Magnuson (University of Wisconsin)			
<b>Funding Agency</b>	National Institute of Child Health and Human Development (NICHD)			
<b>IRB</b>	<b>HUM#:</b>	HUM00137963	<b>Period Of Approval:</b>	
<b>Project Team</b>	<b>Project Lead:</b>	Piotr Dworak		
	<b>Budget Analyst:</b>	Janelle P Cramer		
	<b>Production Manager:</b>	Veronica Connors-Burge		
	<b>Senior Project Advisor:</b>	Stephanie A Chardoul		
	<b>Production Manager:</b>	Margaret Lavanger		
	<b>Production Manager:</b>	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**

July, 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. So far we have confirmed contact info for 86% of cases and delivered 237 cases to the lab while keeping costs in check or adding to underrun.

Staffing: In August, consolidation continues -- one of the BFY TLs is moving over to HRS.

**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  
Aug 14, 2022

**Total Cost to Date (Direct + Indirect):** 5,817,153.44  
**Estimated Cost at Completion (E\$AC):** 7,163,982.97  
**Total Budget:** 6,732,030.00  
**Variance (Budget minus E\$AC):** -431,952.97  
**Reason For Variance:** The CRS report is off. As of last month (June) we were + 67K after additional funding was applied and costs re-projected.

Projections  
Aug 14, 2022

**Dollars Projected For Month:** 138,772.85  
**Actual Dollars Used:** 148,162.97  
**Variance (Projected minus Actual):** -9,390.12  
**Reason For Variance:** Following up with budget analyst to also confirm the monthly data.

## Measures

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

## Other Measures

<b>Project Name</b>	(CARE Military) Concussion Assessment, Research and Education (CARE) Consortium 2022 - Military					
<b>Project Mode</b>	Primary: Web	Secondary: Telephone	Total of Modes: 2			
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current		
<b>Budget</b>	<b>Direct Budget:</b>	1,031,747.00	<b>Indirect Budget:</b>	268,254.00		
			<b>Total Budget:</b>	1,300,001.00		
<b>Principal Investigator/Client</b>	Dr. Steven Broglio (U of M Kinesiology) Dr. Micheal McCrea (Medical College of Wisconsin) Dr. Thomas McAllister (Indiana University School of Medicine)					
<b>Funding Agency</b>						
<b>IRB</b>	<b>HUM#:</b>	00202691	<b>Period Of Approval:</b>	7/23/2021 - open		
<b>Project Team</b>	<b>Project Lead:</b>	Donnalee Ann Grey-Farquharson				
	<b>Budget Analyst:</b>	Carl S Remmert				
	<b>Production Manager:</b>	Stacy Quisenberry				
	<b>Senior Project Advisor:</b>	Barbara Lohr Ward				
	<b>Production Manager:</b>	Hongyu Johnson				
	<b>Production Manager:</b>	Keith Liebetreu				
<b>Proposal #:</b>	no data					
<b>Description:</b>	<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 \$1,300,000. This includes \$1,031,747.00 direct and \$268,254 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders).</p>					
<b>SRO Project Period</b>	02/2022 - 03/2023					
<b>Data Col Period</b>	03/2022 - 02/2023					
<b>Security Plan</b>	NA					
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center; vertical-align: top;"> <b>PreProduction Start:</b>  <b>Pretest End:</b>  <b>Staffing Completed:</b>  <b>SS Train Start:</b>  <b>DC Start:</b> </td> <td style="text-align: center; vertical-align: top;"> <b>Pretest Start:</b>  <b>Recruitment Start:</b>  <b>GIT Start:</b>  <b>SS Train End:</b>  <b>DC End:</b> </td> </tr> </table>				<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b>	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>
<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b>	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>					
<b>Other Project Team Members:</b>	Donnalee Grey-Farquharson, Stacy Quisenberry, Hongyu Johnson, Keith Liebetreu, James Koopman, Minako Edgar, David Ackuaku, Carl Remmert					
<b>Other Project Names:</b>	CARE-CSI Military					
<b>Sample Mgmt Sys</b>	Other (non-SRO)					
<b>Data Col Tool</b>	Other (non-SRO)					
<b>Hardware</b>	Laptop; [UM cell] Phone					
<b>DE Software</b>	N/A					
<b>QC Recording Tool</b>	N/A					
<b>Incentive</b>	Yes, R					
<b>Administration</b>	NA					
<b>Payment Type</b>	Check, post (\$150)					
<b>Payment Method</b>	Other (Kinesiology)					

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

**Risk Level** On Track

**Monthly Update**

**System**

Care SMS system update: In July we continued to refine our system. Several user interface improvements were made that focused on streamlining information for our interviewers and Team Leaders. We continue the process of working with QuesGen and Datalys to identify areas of improvement within our system. We have a 'wish list' of features and have been provided a cost to implement. Our plan is to have final decisions on what system improvements to make within this wave of data collection before the end of August.

**Production and Hiring**

-Although interviewers have encountered less technical problems as in previous months, they are still acting as the tech support for respondents and the Project Team are working on protocols to address this in an attempt to reduce interviewer burden - these will be implemented in July.

- Successfully completed 5-day remote training for 16 (2 dropped) new CARE interviewers, all on-staffers who mainly support the Military sample production in July 2022.

- Production Status: as of 07/31/2022

\*Total Released Sample number - 5970 cases

\*Total Comp lws - 584 (Web - 575, CATI - 9)

\*Total Response Rate - 9.8% (Web RR - 9.6%, CATI RR-0.2%)

- Continue to host two Team Calls per week to boost productivity, reinforce best field practice protocols, and share experiences among the iwers.

**DMSS**

- Data delivery has been automated by QuesGen. SRO no longer have to manually download the data every morning.

- The reports are automatically generated every morning.

- Continue to work with the Locating team staff for accurate locating reports.

- Started to work on the QC report on validating interviewers' call attempts records with their cell phone records (data provided by the DCS).

**Locating:**

-We started CARE CSI with 2 locators and 1 Locating TL.

-Locators have been using the NEW CP Email and Text, which has had some success in reaching some respondents. Overall, the response from contact people has been very positive.

-To date we have had 541 lines coded ( Internet) Team Locating( 4520)

\*found 212 Respondents (92 civilian. 123 Military)

\*18 lines are on hold because of GDPR ( 5 C/ 13 Mil).

\*41 military lines have been finalized; 35 completed. Civilian finalized 27 ( 24 completed ).

-We have been discussing with the research team on expanding functionality in using social medias (FB, Twitter, LinkedIn, etc.)

**Special Issues**

**Cost**

Jul 31, 2022

**Total Cost to Date (Direct + Indirect):** 288,607.37

**Estimated Cost at Completion (E\$AC):** 1,158,150.93

**Total Budget:** 1,300,001.00

**Variance (Budget minus E\$AC):** 141,850.07

**Reason For Variance:** Updated Budget was recently uploaded into CRS. The projections will be adjusted in August.

**Projections**

Jul 31, 2022

**Dollars Projected For Month:** 191,513.51

**Actual Dollars Used:** 57,926.91

**Variance (Projected minus Actual):** 133,586.60

**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
	<i>Current Goal:</i> <i>Goal at Completion:</i> <i>Current actual:</i> <i>Estimate at Complete:</i> <i>Variance:</i>		

Other Measures

<b>Project Name</b>	(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022					
<b>Project Mode</b>	Primary: Telephone	Secondary: Web	Total of Modes: 2			
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current		
<b>Budget</b>	<b>Direct Budget:</b>	3,718,978.00	<b>Indirect Budget:</b>	966,936.00		
			<b>Total Budget:</b>	4,685,914.00		
<b>Principal Investigator/Client</b>	Dr. Steven Broglio (U of M Kinesiology) Dr. Michael McCrea (Medical College of Wisconsin) Dr. Thomas McAllister (Indiana University School of Medicine)					
<b>Funding Agency</b>						
<b>IRB</b>	<b>HUM#:</b>	00202691	<b>Period Of Approval:</b>	7/23/2021 - open		
<b>Project Team</b>	<b>Project Lead:</b>	Donnalee Ann Grey-Farquharson				
	<b>Budget Analyst:</b>	Carl S Remmert				
	<b>Production Manager:</b>	Stacy Quisenberry				
	<b>Senior Project Advisor:</b>	Barbara Lohr Ward				
	<b>Production Manager:</b>	Hongyu Johnson				
	<b>Production Manager:</b>	Keith Liebetreu				
<b>Proposal #:</b>	no data					
<b>Description:</b>	<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>					
<b>SRO Project Period</b>	10/2021 - 08/2026					
<b>Data Col Period</b>	03/2022 - 02/2026					
<b>Security Plan</b>	NA					
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> <b>PreProduction Start:</b>  <b>Pretest End:</b>  <b>Staffing Completed:</b>  <b>SS Train Start:</b>  <b>DC Start:</b> </td> <td style="width: 50%; vertical-align: top;"> <b>Pretest Start:</b>  <b>Recruitment Start:</b>  <b>GIT Start:</b>  <b>SS Train End:</b>  <b>DC End:</b> </td> </tr> </table>				<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b>	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>
<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b>	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>					
<b>Other Project Team Members:</b>	Donnalee Grey-Farquharson, Stacy Quisenberry, Hongyu Johnson, Keith Liebetreu, James Koopman, Minako Edgar, David Ackuaku, Carl Remmert					



<b>Other Project Names:</b>	CARE CSI, CARE SALTOS
<b>Sample Mgmt Sys</b>	Other (non-SRO)
<b>Data Col Tool</b>	Other (non-SRO)
<b>Hardware</b>	Laptop; [UM cell] Phone
<b>DE Software</b>	N/A
<b>QC Recording Tool</b>	N/A
<b>Incentive</b>	Yes, R
<b>Administration</b>	UM Group (Kinesiology)
<b>Payment Type</b>	Check, post (\$150.00)
<b>Payment Method</b>	Check through other system (UM)

<b>Report Period</b>	July, 2022 (CARE SALTOS MTEC)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	<i>On Track</i>		
<b>Monthly Update</b>	<p>System</p> <p>Care SMS system update: In July we continued to refine our system. Several user interface improvements were made that focused on streamlining information for our interviewers and Team Leaders. We continue the process of working with QuesGen and Datalys to identify areas of improvement within our system. We have a 'wish list' of features and have been provided a cost to implement. Our plan is to have final decisions on what system improvements to make within this wave of data collection before the end of August.</p> <p>Production and Hiring</p> <ul style="list-style-type: none"> <li>-Although interviewers have encountered less technical problems as in previous months, they are still acting as the tech support for respondents and the Project Team are working on protocols to address this in an attempt to reduce interviewer burden - these will be implemented in July.</li> <li>- Successfully completed 5-day remote training for 16 (2 dropped) new CARE interviewers, all on-staffers who mainly support the Military sample production in July 2022.</li> </ul> <p>- Production Status: as of 07/31/2022</p> <ul style="list-style-type: none"> <li>*Total Released Sample number - 4632 cases</li> <li>*Total Comp lws - 1636 (Web - 1615, CATI - 21)</li> <li>*Total Response Rate - 35.5% (Web RR - 35.0%, CATI RR-0.5%)</li> </ul> <p>- Continue to host two Team Calls per week to boost productivity, reinforce best field practice protocols, and share experiences among the interviewers.</p> <p>DMSS</p> <ul style="list-style-type: none"> <li>- Data delivery has been automated by QuesGen. SRO no longer have to manually download the data every morning.</li> <li>- The reports are automatically generated every morning.</li> <li>- Continue to work with the Locating team staff for accurate locating reports.</li> <li>- Started to work on the QC report on validating interviewers' call attempts records with their cell phone records (data provided by the DCS).</li> </ul> <p>Locating:</p> <ul style="list-style-type: none"> <li>-We started CARE CSI with 2 locators and 1 Locating TL.</li> <li>-Locators have been using the NEW CP Email and Text, which has had some success in reaching some respondents. Overall, the response from contact people has been very positive.</li> <li>-To date we have had 541 lines coded ( Internet) Team Locating( 4520) <ul style="list-style-type: none"> <li>*found 212 Respondents (92 civilian. 123 Military)</li> <li>*18 lines are on hold because of GDPR ( 5 C/ 13 Mil).</li> <li>*41 military lines have been finalized; 35 completed. Civilian finalized 27 ( 24 completed ).</li> </ul> </li> <li>-We have been discussing with the research team on expanding functionality in using social medias (FB, Twitter, LinkedIn, etc.)</li> </ul>		

**Special Issues**

**Cost**  
**Jul 31, 2022**

**Total Cost to Date (Direct + Indirect):** 441,598.33  
**Estimated Cost at Completion (E\$AC):** 4,662,518.33  
**Total Budget:** 4,685,914.00  
**Variance (Budget minus E\$AC):** 23,395.67  
**Reason For Variance:** Updated Budget was recently uploaded into CRS. The underrun value is closely reflecting the current projection. The projection will be revisited in August 2022.

**Projections**  
**Jul 31, 2022**

**Dollars Projected For Month:** 123,920.38  
**Actual Dollars Used:** 132,516.67  
**Variance (Projected minus Actual):** -8,596.29  
**Reason For Variance:** Budget was recently uploaded into CRS. We will make adjustments on projections and charges that will be reflected in August 2022. Future projections will be in-line with actual costs.

**Measures**

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

**Other Measures**

<b>Project Name</b>	(CRUSE) Survey on Crypto-Asset Adoption and Use				
<b>Project Mode</b>	Primary: Web	Secondary: Focus Group	Total of Modes: 2		
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current		
<b>Budget</b>	<b>Direct Budget:</b> 625,726.00	<b>Indirect Budget:</b> 9,618.00	<b>Total Budget:</b> 635,344.00		
<b>Principal Investigator/Client</b>	Vikramaditya Khanna (UM Law School)				
<b>Funding Agency</b>					
<b>IRB</b>	<b>HUM#:</b> HUM00214234	<b>Period Of Approval:</b>	1/1/2022-12/31/2022		
<b>Project Team</b>	<b>Project Lead:</b> Piotr Dworak <b>Budget Analyst:</b> William Lokers <b>Production Manager:</b> <b>Senior Project Advisor:</b> Lisa S Holland <b>Production Manager:</b> <b>Production Manager:</b> Ian Ogden				
<b>Proposal #:</b>	no data				
<b>Description:</b>	<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%.</p> <p>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.</p> <p>\$635,344 (\$625,726 + \$9,618).</p>				
<b>SRO Project Period</b>	05/2022 - 04/2023				
<b>Data Col Period</b>	10/2022 - 02/2023				
<b>Security Plan</b>	NA				
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center; vertical-align: top;"> <b>PreProduction Start:</b>  <b>Pretest End:</b>  <b>Staffing Completed:</b>  <b>SS Train Start:</b>  <b>DC Start:</b> </td> <td style="text-align: center; vertical-align: top;"> <b>Pretest Start:</b>  <b>Recruitment Start:</b>  <b>GIT Start:</b>  <b>SS Train End:</b>  <b>DC End:</b> </td> </tr> </table>			<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b>	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>
<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b>	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>				
<b>Other Project Team Members:</b>	Karin Schneider conducted focus group. Survey phase led by Piotr Dworak. Team include Ian Ogden and Xiomara Guerra.				
<b>Other Project Names:</b>					
<b>Sample Mgmt Sys</b>	Web SMS				
<b>Data Col Tool</b>	Blaise 4.8				
<b>Hardware</b>	Other				
<b>DE Software</b>	N/A				
<b>QC Recording Tool</b>	N/A				
<b>Incentive</b>	Yes, R				
<b>Administration</b>	SRO Group				
<b>Payment Type</b>	Cash, prepaid (\$2); Other (survey completes paid by check)				
<b>Payment Method</b>	Check through other system (focus groups recd e-gift card (Tango))				

Report Period	July, 2022 (CRUSE)	Project Phase	Implementing																								
Risk Level	Some Concerns																										
Monthly Update	Focus groups completed as planned. This is survey planning phase. Main July activity is questionnaire drafting.																										
Special Issues	Survey will be limited to one replicate.																										
Cost																											
Aug 16, 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 16, 2022	Dollars Projected For Month:	21,300.00																									
	Actual Dollars Used:	21,300.00																									
	Variance (Projected minus Actual):	0.00																									
	Reason For Variance:	July was the first "real" reporting month as in June most costs were charged to OH in anticipation of receiving the project shortcodes (which we got too late in June for ET).																									
Measures	<table><thead><tr><th></th><th>Units Complete</th><th>RR</th><th>HPI</th></tr></thead><tbody><tr><td>Current Goal:</td><td></td><td></td><td></td></tr><tr><td>Goal at Completion:</td><td></td><td></td><td></td></tr><tr><td>Current actual:</td><td></td><td></td><td></td></tr><tr><td>Estimate at Complete:</td><td></td><td></td><td></td></tr><tr><td>Variance:</td><td></td><td></td><td></td></tr></tbody></table>				Units Complete	RR	HPI	Current Goal:				Goal at Completion:				Current actual:				Estimate at Complete:				Variance:			
	Units Complete	RR	HPI																								
Current Goal:																											
Goal at Completion:																											
Current actual:																											
Estimate at Complete:																											
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**

July, 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 7 prenatal clinics.

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

**Production Stats**

To date, 1,470 women have been recruited in clinics across the state of Michigan. As of today, 1,031 were still eligible and active study participants at the end of Phase 1 (prenatal period through child birth). This is a major recruitment milestone. The MARCH recruitment target is 1,100 mothers / live births, so there are less than 75 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: 914

Prenatal Survey 2: 681

## [Phase 2: 3-Month Data Collection Summary]

Babies born: 895  
 3-month sample released: 886  
 3-month interviews completed: 632  
 Average attempts / lw: 7.8  
 lw length: 46 min.  
 Response Rate: 73%  
 3-month biospecimen collected: 364

## [Phase 3: Age 4 REDCap Survey]

Age-4 sample released: 63  
 REDCap surveys completed: 33  
 Response Rate: 53%

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

Age-4 sample released: 29  
 In-person visits completed: 6  
 In-person visits scheduled: 1

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**

Steven and Terri have completed the expedited training and certification on the REDCap protocols and interface, which was time-intensive (and time sensitive). And we've shifted project team assignments due to the recent staff departure to accommodate the transition and support priorities. We continue to maintain three distinct (Phase 1-3) technical systems and all study protocols.

We delivered a 3-day in-person training to the two new interviewers who will be working on the Age 4 in-home protocols. The training was a success and the interviewers passed certification / proficiency on the multiple study assessment components.

**Cost**  
**Aug 17, 2022**

**Total Cost to Date (Direct + Indirect):** 405,790.61  
**Estimated Cost at Completion (E\$AC):** 448,066.70  
**Total Budget:** 427,336.00  
**Variance (Budget minus E\$AC):** -20,730.70  
**Reason For Variance:**

We believe we'll have an overrun in the Year 6 ECHO budget that supports SRO's scope of work (Phase 1: Recruitment + Prenatal Interviews; Phase 2: 3-month Interview; and Phase 3: Age 4 protocols) and ends August 31, 2022. We've discussed this with the financial manager at SRC, the PIs and study office at MSU, and have determined a resolution.

For the final Year 7 of the project, we'll continue to monitor the budget as we administer Age 4 in-person visits. These new protocols are a significant part of the Y6 budget and are the priority. We're using the current Age 4 rolling participant sample projections and budget assumptions for response rate and HPI estimates. We will update projections over time as we have actual costs and data to compare with. As of today, the average HPI for the first six in-person visits is 20. We expect efficiencies over time, but assume the HPI will be greater than what was originally projected last June, 2021 (11 HPI) when the full set of requirements and expectations were less understood.

The final budget Year 7 begins on September 1. We haven't received official word from the sponsor (NIH), via the client (MSU), but expect to hear something in the next few weeks. This is expected and we do not foresee any issues with funding.

Last month we received word that non-competitive ECHO 2 study funding will be available and the MSU team intends to apply for it. This ECHO 2 award would support the study after the final year of the original study ends next fall 2023.

**Projections**  
**Aug 17, 2022**

**Dollars Projected For Month:** 45,492.25  
**Actual Dollars Used:** 46,239.34  
**Variance (Projected minus Actual):** -947.09  
**Reason For Variance:**

We'll start to incur main data collection expenses, primarily interviewer hours and incentives, as we implement more Age 4 in-person visits across the state of Michigan. We'll continue to update projections to reflect actual costs as we launch these brand new in-person protocols.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>	See Monthly Updates		
<b>Goal at Completion:</b>			
<b>Current actual:</b>			
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

**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 Alscer (SPA), Barbara Ward (Project Lead), Donnalee Grey-Farquharson (Project Manager) Marsha Skoman (Tech Lead), Jeff Smith (Tech Lead backup), Peter Sparks (Blaise Programmer), Ashwin Dey (Webtrak Programmer), Stephanie Windisch (Data Manager), Barb Homburg (Production manager, Field), William Keating (Production manager, SSL), Megan Gomez-Mesquita (Financial Analyst)

**Other Project**  
**Names:**

EDC

**Sample Mgmt Sys**

SurveyTrak

**Data Col Tool**

Blaise 4.8

**Hardware**

Laptop; [UM cell] Phone

**DE Software**

N/A

**QC Recording Tool**

Camtasia

**Incentive**

Yes, R

**Administration**

SRO Group; Other (PI Payment)

**Payment Type**

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

**Payment Method**

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

**Report Period**

July, 2022 (EDC Midline)

**Project Phase**

Initiation

**Risk Level**

On Track

**Monthly Update**

Data collection closed officially on July 31. One addition iw completed following that for a n or 2900 (only 95 cases NOT interviewed).  
 Ian Ogend has been maintaining excellent data documentation enabling an efficient close out of data collection.

**Special Issues**

Working on data deliverables. Documentation through MQDS still not 100% client-friendly. Ian Ogden doing the lionshare of work in translating loops and series in Blaise (and our infamous household roster) to the ORL data manger. Ian also maintaining excellent

**Cost**  
**Aug 14, 2022**

**Total Cost to Date (Direct + Indirect):** 1,349,781.20  
**Estimated Cost at Completion (E\$AC):** 1,603,744.64  
**Total Budget:** 2,124,151.00  
**Variance (Budget minus E\$AC):** 520,406.36  
**Reason For Variance:** See previous months.

**Projections**  
**Aug 14, 2022**

**Dollars Projected For Month:** 249,414.36  
**Actual Dollars Used:** 264,099.71  
**Variance (Projected minus Actual):** -14,685.35  
**Reason For Variance:** Had lower hours this month. Project continues the efficiency Barb W achieved in the heavy production months.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>		85	
<b>Goal at Completion:</b>		97	
<b>Current actual:</b>			
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

**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)														

<b>Report Period</b>	July, 2022 (EDC-SS Phases 3-4)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	On Track		
<b>Monthly Update</b>	July had lower activity, just consult with PI to prepare for training and updating manual for training. Training Aug 22-26.		
<b>Special Issues</b>	none		

**Cost**  
**Aug 14, 2022**

**Total Cost to Date (Direct + Indirect):** 151,735.93  
**Estimated Cost at Completion (E\$AC):** 327,231.73  
**Total Budget:** 408,935.00  
**Variance (Budget minus E\$AC):** 81,703.27  
**Reason For Variance:** Underrun due to travel costs included in budget and all interviewing is by phone.

**Projections**  
**Aug 14, 2022**

**Dollars Projected For Month:** 14,249.48  
**Actual Dollars Used:** 7,120.37  
**Variance (Projected minus Actual):** 7,129.11  
**Reason For Variance:** Lower staff effort needed in run-up to training for Phase 4.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>	129		5.0
<b>Goal at Completion:</b>	129		5.0
<b>Current actual:</b>	0		
<b>Estimate at Complete:</b>	122		
<b>Variance:</b>			

**Other Measures**

Will not conduct production iws until Sept.

<b>Project Name</b>	(HCAP 2022) Harmonized Cognitive Assessment Protocol, 2022													
<b>Project Mode</b>	Primary: Face to Face      Secondary: Telephone													
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current										
<b>Budget</b>	<b>Direct Budget:</b>	3,300,000.00	<b>Indirect Budget:</b>	1,188,000.00 <b>Total Budget:</b> 4,488,000.00										
<b>Principal Investigator/Client</b>	Kenneth Langa (SRC) David Weir (SRC)													
<b>Funding Agency</b>														
<b>IRB</b>	<b>HUM#:</b>	HUM00099822	<b>Period Of Approval:</b>											
<b>Project Team</b>	<b>Project Lead:</b>	Maureen Joan O'Brien												
	<b>Budget Analyst:</b>	Richard Warren Krause												
	<b>Production Manager:</b>	Margaret Lavanger												
	<b>Senior Project Advisor:</b>	Evanthia Leissou												
	<b>Production Manager:</b>													
	<b>Production Manager:</b>													
<b>Proposal #:</b>	no data													
<b>Description:</b>	<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>													
<b>SRO Project Period</b>	01/2022 - 12/2023													
<b>Data Col Period</b>	07/2022 - 09/2023													
<b>Security Plan</b>	NA													
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"><b>PreProduction Start:</b></td> <td style="padding: 5px;"><b>Pretest Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>Pretest End:</b></td> <td style="padding: 5px;"><b>Recruitment Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>Staffing Completed:</b></td> <td style="padding: 5px;"><b>GIT Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>SS Train Start:</b></td> <td style="padding: 5px;"><b>SS Train End:</b></td> </tr> <tr> <td style="padding: 5px;"><b>DC Start:</b></td> <td style="padding: 5px;"><b>DC End:</b></td> </tr> </table>				<b>PreProduction Start:</b>	<b>Pretest Start:</b>	<b>Pretest End:</b>	<b>Recruitment Start:</b>	<b>Staffing Completed:</b>	<b>GIT Start:</b>	<b>SS Train Start:</b>	<b>SS Train End:</b>	<b>DC Start:</b>	<b>DC End:</b>
<b>PreProduction Start:</b>	<b>Pretest Start:</b>													
<b>Pretest End:</b>	<b>Recruitment Start:</b>													
<b>Staffing Completed:</b>	<b>GIT Start:</b>													
<b>SS Train Start:</b>	<b>SS Train End:</b>													
<b>DC Start:</b>	<b>DC End:</b>													
<b>Other Project Team Members:</b>	PDMG: Tony Romanowski, Lisa VanHavermaet, Megan Hromco. TSG: Jeff Smith, Brad Goodwin, Vallyn Dall, Peter Sparks, Ashwin Dey, Deb Wilson													
<b>Other Project Names:</b>														
<b>Sample Mgmt Sys</b>	SurveyTrak													
<b>Data Col Tool</b>	Blaise 4.8													
<b>Hardware</b>	Laptop; [UM cell] Phone													
<b>DE Software</b>	Blaise 4.8 BIA													
<b>QC Recording Tool</b>	NA													
<b>Incentive</b>	Yes, R; Yes, INF													
<b>Administration</b>	NA													
<b>Payment Type</b>	Check, prepaid (50); Check, post (25)													
<b>Payment Method</b>	Check through STrak RPay System													

<b>Report Period</b>	July, 2022 (HCAP 2022)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	On Track		
<b>Monthly Update</b>	HCAP production has been underway for 3 weeks and is going well. There are 16 lwers, 2 TLs, a PC, and a PM. 253 interviews have been completed, including 153 R and 101 Inf. There are currently 117 appts. Of the three		

sample types, Reinterviews are completing at the highest rate, 56.6%, and represent 51.5% of the sample. Age-ins are completing at 38.5% and represent 40.8% of the sample. Recontacts, those who said no in 2016, are completing at 4.9% and represent 7.7% of the sample. The HPI is 4.88, 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 into a Blaise Stand-alone and not Weblog due to more detailed and extensive data entry. We are working on Logging/DE reports. QC has begun and systems (Blaise 4.8) are working smoothly with Olive now. A second HCAP lwer training is scheduled for Oct 16-21 and will be held at the Marriott in Ypsi. We have hired 15 OSers (incl 3 from first round), 2 more TLs, and posted for 12 NHs. Interviewing for NHs started last week. 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 Pls weekly. Spanish materials should be ready by the end of this week to submit to IRB early next week. Goals will be filled in for next moth's MPR.

**Special Issues**

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

**Cost**  
**Aug 14, 2022**

**Total Cost to Date (Direct + Indirect):** 625,678.64  
**Estimated Cost at Completion (E\$AC):** 4,253,728.28  
**Total Budget:** 4,488,000.00  
**Variance (Budget minus E\$AC):** 234,271.72  
**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**  
**Aug 14, 2022**

**Dollars Projected For Month:** 268,638.88  
**Actual Dollars Used:** 179,432.57  
**Variance (Projected minus Actual):** 89,206.31  
**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
<b>Current Goal:</b>			
<b>Goal at Completion:</b>	3530	76%	
<b>Current actual:</b>	253	7.2%	4.88
<b>Estimate at Complete:</b>		76%	
<b>Variance:</b>			

**Other Measures**

**Project Name** (HRS 2021 OYMS / COVID Survey) HRS 2021 Off-Year Mail Study / COVID Survey

**Project Mode** Primary: Mail Total of Modes: 1

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

**Budget** **Direct Budget:** 980,826.66 **Indirect Budget:** 353,097.34 **Total Budget:** 1,333,924.00

**Principal Investigator/Client** Dr. David Weir (UM-ISR (SRC-HRS))  
Dr. Helen Levy (UM-ISR (SRC-HRS))

**Funding Agency** National Institutes of Health (NIH)

**IRB** **HUM#:** HUM00196577 **Period Of Approval:** 4/26/2021-4/25/2022

**Project Team** **Project Lead:** Ian Ogden  
**Budget Analyst:** Grace Tison  
**Production Manager:** Kelley Lynn Popielarz  
**Senior Project Advisor:** Evanthia Leissou  
**Production Manager:** Ian Ogden  
**Production Manager:**

**Proposal #:** no data

**Description:** [Updated 09/2021]  
This project refers to two distinct releases which comprise the 2021 "Off-Year Mail Study" - (1) A Spring effort (n~14,000, data collection running from June-September, 2021) and (2) a Fall effort (n~6000, data collection running from October, 2021-March, 2022). Following the model of past off-year mail studies, most HRS panel respondents will be sent a paper booklet, as well as a prepaid incentive by check, and will be asked to complete the paper survey and mail back to Ann Arbor via prepaid return materials. Logging of paper booklets will take place in Ann Arbor, where booklets will be packaged and shipped to an external vendor, DataForce, for scanning and data-export. This study will follow a Dillman-like reminder sequence - initial mailing, followed by up to three reminder mailings (booklet #2, postcard, booklet #3).

An external vendor, DataForce, will handle (1) formatting, printing and mailing of the booklet (in English and Spanish); (2) sending reminder mailings to each batch of sample; and (3) scanning completed booklets and delivering data to SRO for processing and delivery.

The sample size for this project is significantly larger than other "off-year" mail studies such as LHMS. Relatedly, and also unlike past instances of HRS off-year mail studies, this project's sample is not distinct from that of HRS CAMS; all HRS CAMS participants were asked to complete the COVID Survey as part of the Spring effort.

Key differences between the Spring and Fall efforts:  
(1) Distinct sample (also from among existing HRS panel)  
(2) Several revisions to the questionnaire  
(3) Changes to management team

The Spring and Fall HRS COVID Survey / OYMS efforts are under the same Project/Grant and costs are tracked jointly; however, the two efforts have distinct sets of shortcodes, so "effort"-level cost monitoring is possible where needed.

**SRO Project Period** 03/2021 - 06/2022

**Data Col Period** 05/2021 - 05/2022

**Security Plan** NA

**Milestone Dates**

**PreProduction Start:** 03/01/2021

**Pretest 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



<b>Other Project</b>	Technical Leads: Ian Ogden & Jim Rodgers
<b>Team Members:</b>	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)
<b>Other Project</b>	HRS 2021 Off-Year Mail Study
<b>Names:</b>	HRS 2021 OYMS (COVID) / OYMSF
<b>Sample Mgmt Sys</b>	SRTrak & MSMS
<b>Data Col Tool</b>	N/A
<b>Hardware</b>	SRTrak & MSMS
<b>DE Software</b>	Other (MSMS DCA)
<b>QC Recording Tool</b>	N/A
<b>Incentive</b>	Yes, R
<b>Administration</b>	SRO Group
<b>Payment Type</b>	Check, prepaid (25.00)
<b>Payment Method</b>	Check through STTrak RPay System

<b>Report Period</b>	July, 2022 (HRS 2021 OYMS / COVID)	<b>Project Phase</b>	Closing
<b>Risk Level</b>	<i>On Track</i>		
<b>Monthly Update</b>	<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>		

[Production & Project Closeout Status]

Following the end of data collection and logging in June, technical closeout was completed in August, 2022; updated listing of closeout tasks and status:

- (1) Sending of final batch of questionnaires to DataForce for processing - Done (Unchanged)
- (2) Performing final reconciliation to ensure receipt of survey data for all questionnaires sent - Done (Unchanged)
- (3) Sending of final batches of data to SRC-HRS - Done (Unchanged)
- (4) Initiation of process to send any non-blank questionnaires received on/after 6/23/2022 directly to SRC-HRS without processing/logging - Done (Unchanged)
- (5) Finalizing open sample in MSMS - Done (August, 2022)
- (6) Prep and deliver final production report (inc. counts and rates) - Done (August, 2022)

With this, though the production figures below have not changed in several months, they can now be considered final.

**Special Issues**

None.

<b>Cost</b>	<b>Total Cost to Date (Direct + Indirect):</b>	1,224,826.30
<b>Aug 12, 2022</b>	<b>Estimated Cost at Completion (E\$AC):</b>	1,160,897.63
	<b>Total Budget:</b>	1,333,924.00
	<b>Variance (Budget minus E\$AC):</b>	173,026.37
	<b>Reason For Variance:</b>	

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 8/12/2022 amount to a credit of \$63,928.67 .

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**  
**Aug 12, 2022**

**Dollars Projected For Month:** 22,480.89  
**Actual Dollars Used:** 20,168.81  
**Variance (Projected minus Actual):** 2,312.08  
**Reason For Variance:** Lower than projected salary costs and associated recharges.

**Measures**

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

**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%

<b>Project Name</b>	(HRS 2022 Panel) Health and Retirement Study 2022												
<b>Project Mode</b>	Primary: Mixed    Total of Modes: 3												
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current										
<b>Budget</b>	<b>Direct Budget:</b> 12,138,521.00	<b>Indirect Budget:</b> 4,369,869.00	<b>Total Budget:</b> 16,508,390.00										
<b>Principal Investigator/Client</b>	David Weir (ISR-SRC)												
<b>Funding Agency</b>													
<b>IRB</b>	<b>HUM#:</b> HUM000611128	<b>Period Of Approval:</b>	9/8/2021 to 9/7/2022										
<b>Project Team</b>	<b>Project Lead:</b> Evanthia Leissou <b>Budget Analyst:</b> Richard Warren Krause <b>Production Manager:</b> Andrea Sims <b>Senior Project Advisor:</b> Nicole G Kirgis <b>Production Manager:</b> Deborah Zivan <b>Production Manager:</b> Jennifer C Arrieta												
<b>Proposal #:</b>	no data												
<b>Description:</b>	<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>												
<b>SRO Project Period</b>	01/2021 - 05/2023												
<b>Data Col Period</b>	03/2022 - 04/2023												
<b>Security Plan</b>	NA												
<b>Milestone Dates</b>	<table border="1"> <tr> <td><b>PreProduction Start:</b> 01/01/2021</td> <td><b>Pretest Start:</b> 11/01/2021</td> </tr> <tr> <td><b>Pretest End:</b> 11/23/2021</td> <td><b>Recruitment Start:</b> 08/01/2021</td> </tr> <tr> <td><b>Staffing Completed:</b> 01/15/2022</td> <td><b>GIT Start:</b> 02/21/2021</td> </tr> <tr> <td><b>SS Train Start:</b> 02/23/2022</td> <td><b>SS Train End:</b> 03/03/2022</td> </tr> <tr> <td><b>DC Start:</b> 03/07/2022</td> <td><b>DC End:</b> 04/15/2023</td> </tr> </table>			<b>PreProduction Start:</b> 01/01/2021	<b>Pretest Start:</b> 11/01/2021	<b>Pretest End:</b> 11/23/2021	<b>Recruitment Start:</b> 08/01/2021	<b>Staffing Completed:</b> 01/15/2022	<b>GIT Start:</b> 02/21/2021	<b>SS Train Start:</b> 02/23/2022	<b>SS Train End:</b> 03/03/2022	<b>DC Start:</b> 03/07/2022	<b>DC End:</b> 04/15/2023
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<b>SS Train Start:</b> 02/23/2022	<b>SS Train End:</b> 03/03/2022												
<b>DC Start:</b> 03/07/2022	<b>DC End:</b> 04/15/2023												
<b>Other Project Team Members:</b>	Derek Dubuque (Production Manager), Theresa Camello (Production Manager), Taghreid Lovell (Production Manager), Deborah Zivan (Project Manager), Andrew Hupp (Project Manager), Gary Hein (Project Manager), Michelle Smith (Project Manager/Training Coordinator), Maureen O' Brien (Training Coordinator), Daniah Buageila (Project Manager), Anna Fuqua-Smith (Project Manager), Janet McBride (Project Assistant), Paul Burton (Stats/Sampling), Vanessa Clarke (Project Assistant), Jeannie Baker (Project Assistant), Melissa Luker (Project Assistant), Anthony Romanowski (Project Manager), Megan Hromco (Project Assistant) Tech Team: Karl Dinkelmann, Jeff Smith, Jim Rodgers, Laura Yoder, Marsha Skoman, Ashwin Dey, Pam Swanson, David Bolt, Deb Wilson, Jennie Williams, Rose Zybdel, Stephanie Windisch, Heather Schroeder, Holly Ackerman, Shane Empie, Kelly Chatain												
<b>Other Project Names:</b>													
<b>Sample Mgmt Sys</b>	SurveyTrak; MSMS												
<b>Data Col Tool</b>	Blaise 5												
<b>Hardware</b>	Laptop; [UM cell] Phone; Paper and Pencil												
<b>DE Software</b>	Other (Blaise 5 Coding Application); External vendor (DataForce Scanning SAQs)												
<b>QC Recording Tool</b>	Camtasia												
<b>Incentive</b>	Yes, R; Yes, INF												
<b>Administration</b>	NA												
<b>Payment Type</b>	Check, prepaid (80.00); Check, post (\$50 (WBD), \$20 (SAQ))												
<b>Payment Method</b>	Check through STRak RPay System; Check through other system (Rpay system set up for MSMS); Interviewer p												
<b>Report Period</b>	July, 2022 (HRS 2022 Panel)	<b>Project Phase</b>	Implementing										
<b>Risk Level</b>	Some Concerns												

**Monthly Update**

Projected hours and completed interviews were consistently higher than goals throughout the month of July. The project team has been working on production monitoring, IRB submissions, logging, payment and letter request processing, and testing. The project team has also been working on preparing for a late August training as well as SSA and SAQ mailings. Technical development has continued with the Blaise instrument, SurveyTrak, Weblog, WebTrak, and reports. Web panel programming and testing in MSMS continued. Datamodel 5 was released to the field. The technical team continues to work with CBS on Blaise issues impacting web panel. Interviewer recruitment for the September training is in process. 1,305 TLC Panel SIDs (1,028 households) were released to field.

**Special Issues**

- Projected overrun
- Blaise 5.10 issues impacting web panel
- Assisting interviewers to balance their screener and main interview sample to make sure goals are met.

**Cost****Aug 14, 2022**

**Total Cost to Date (Direct + Indirect):** 8,393,160.51  
**Estimated Cost at Completion (E\$AC):** 16,727,746.17  
**Total Budget:** 16,508,390.00  
**Variance (Budget minus E\$AC):** -219,356.17  
**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 are projected. Includes increased mileage costs for remaining interviews.

**Projections****Aug 14, 2022**

**Dollars Projected For Month:** 1,170,821.16  
**Actual Dollars Used:** 976,588.17  
**Variance (Projected minus Actual):** 194,232.99  
**Reason For Variance:** This month's underrun can largely be attributed to salary costs for both iwers and regular staff, primarily due to vacation and sick time. Rpay and travel were also under projection for the month - future projections have been adjusted accordingly.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>	6848	29.7%	10.0
<b>Goal at Completion:</b>	16266	74.0%	9.0
<b>Current actual:</b>	7020	30.4%	8.06
<b>Estimate at Complete:</b>	16266	74.0%	9.0
<b>Variance:</b>	0	0	0

**Other Measures**

<b>Project Name</b>	(HRS2022-Screening) HRS 2022 - Screening					
<b>Project Mode</b>	Primary: Face to Face	Secondary: Telephone	Total of Modes: 2			
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current		
<b>Budget</b>	<b>Direct Budget:</b>	17,851,365.00	<b>Indirect Budget:</b>	6,426,491.00		
			<b>Total Budget:</b>	24,277,856.00		
<b>Principal Investigator/Client</b>	David Weir (SRC) Helen Levy (SRC) Ken Langa (SRC)					
<b>Funding Agency</b>						
<b>IRB</b>	<b>HUM#:</b>		<b>Period Of Approval:</b>			
<b>Project Team</b>	<b>Project Lead:</b>	Evanthia Leissou				
	<b>Budget Analyst:</b>	Richard Warren Krause				
	<b>Production Manager:</b>					
	<b>Senior Project Advisor:</b>	Nicole G Kirgis				
	<b>Production Manager:</b>	Andrew L Hupp				
	<b>Production Manager:</b>					
<b>Proposal #:</b>	no data					
<b>Description:</b>	<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>					
<b>SRO Project Period</b>	02/2021 - 01/2024					
<b>Data Col Period</b>	03/2022 - 01/2024					
<b>Security Plan</b>	NA					
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> <b>PreProduction Start:</b>  <b>Pretest End:</b>  <b>Staffing Completed:</b>  <b>SS Train Start:</b>  <b>DC Start:</b> 04/19/2022 </td> <td style="padding: 5px;"> <b>Pretest Start:</b>  <b>Recruitment Start:</b>  <b>GIT Start:</b>  <b>SS Train End:</b>  <b>DC End:</b> </td> </tr> </table>				<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b> 04/19/2022	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>
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<b>Other Project Team Members:</b>						
<b>Other Project Names:</b>						
<b>Sample Mgmt Sys</b>	SurveyTrak; Other ((Blaise) Case Management App (CMA))					
<b>Data Col Tool</b>	Blaise 5					
<b>Hardware</b>	Laptop; [UM cell] Phone; Paper and Pencil					
<b>DE Software</b>	N/A					
<b>QC Recording Tool</b>	Camtasia; N/A					
<b>Incentive</b>	Yes, R; Yes, INF					
<b>Administration</b>	SRO Group					
<b>Payment Type</b>	Check, post; Cash, post					
<b>Payment Method</b>	Check through STRak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest C					

<b>Report Period</b>	July, 2022 (HRS2022-Screening)	<b>Project Phase</b>	Implementing
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<b>Risk Level</b>	On Track
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<b>Monthly Update</b>	<p>Sampling: The first Type I updates (12 addresses) were added and sent to the field. Tony was able to get through most of the backlog of Type I and Type II updates that were submitted before his vacation. He left a few for Andrew to review that may need units added (the others did not). An interviewer discovered a respondent from PSID during a baseline visit. The address was a pre-Id MOC that completed the screener via the web. The address was one that PSID used for their immigrant refresher. After a review and a discussion with the PIs we are coding out 80 pre-Id MOC addresses (as non-sample) that PSID attempted during their immigrant refresher.</p>
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The expanded and new concepts from the screener refresher training were added to the main training materials. We are preparing for the second training (mainly of on-staffers) the last week of August and the third training (mainly of new hires) at the end of September.

Andrew and Brady worked through a follow-up protocol for the screening sample. They had a follow-up meeting with sampling and made some edits based on their feedback. The current plan is to pull batch 1 sample lines from the field on 8/15 so they can focus on having a good start with the batch 2 sample which is going to the field the same day. All cases with a phone number will be reassigned (and returned) to a subset of (mostly panel) staff being identified to do phone screening. In-person first cases without a phone number will be sent a new final web reminder packet containing a URL and a paper questionnaire. Web first cases without a phone number will be held and could be brought back at a later date.

The follow-up protocol beginning with batch 2 is:

The initial protocols will be worked until a case has received 10 attempts, or until the case hits the 24-week mark (whichever comes first). For cases randomized after 10 attempts, they will get worked until the 24-week mark. For cases hitting the 24-week mark, they will get worked under the new protocol for two more weeks, and then the case will be stopped. After hitting one of these two points, active cases will be classified into one of the six types above. At that point, starting with Release 2, cases of each type will be randomly assigned (20% treatment, 80% control, to prevent significant changes to initial expectations used for sampling) to follow-up protocols as follows:

--Initial web cases will be randomly assigned to telephone follow-up (when numbers are available) or continued FTF follow-up (to the extent possible within the remaining two weeks).

--Initial FTF cases will be randomly assigned into three groups: 1) telephone follow-up (when numbers are available), 2) "abridged" web protocol follow-up (e.g., initial mailing of a packet with a web link and a paper screener, including one follow-up mailing), or 3) continued FTF follow-up (to the extent possible within the remaining two weeks).

--For each type of initial assignment (web-first or FTF), we will want to look at interactions between the type of active screening case and the experimental assignment, and see what follow-up protocols work best for what types of cases within the 12-week period (focusing primarily on response rates).

--We also want to analyze (starting with Release 2) whether all of the active cases were "touched" using these protocols in the two-week period. If not, we may decide to prioritize certain types of cases using model-based approaches in future releases.

--In addition to the results of the "main effect" analyses of initial web vs. FTF protocol on costs and response rates (WIP for Release 1), results of these analyses will be used to optimize approaches in future releases.

IRB: 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 have been provided to HRS staff to submit with the next amendment in early August.

Paul has been busy creating and updating reports to monitor screening production.

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.

Andrew and Theresa discussed the screening goals and sample release plan. Andrew and Jen will revise in August prior to the batch 2 release to the field. They will modify the goals through Labor Day and monitor to decide if/how to adjust moving forward.

Andrew will begin meeting with the BA and Eva in July.

## Special Issues

Cost  
Aug 12, 2022

<b>Total Cost to Date (Direct + Indirect):</b>	4,186,984.18
<b>Estimated Cost at Completion (E\$AC):</b>	24,677,006.27
<b>Total Budget:</b>	24,277,856.00
<b>Variance (Budget minus E\$AC):</b>	-399,150.27
<b>Reason For Variance:</b>	Updating projections to be more in line with actuals from the field.

**Projections**  
**Aug 12, 2022**

**Dollars Projected For Month:** 695,526.39  
**Actual Dollars Used:** 456,421.57  
**Variance (Projected minus Actual):** 239,104.82  
**Reason For Variance:** --Staff hours in June were lower than projections by ~25% (~\$91,489).

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>	3,600/1,500 HHs	73%	3.0
<b>Goal at Completion:</b>			
<b>Current actual:</b>	231/205	19.1%	3.36
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

**Other Measures**

Project Name	(IHDS3) India Human Development Survey Wave 3				
Project Mode	Primary: Face to Face		Secondary: Telephone	Total of Modes: 2	
Project Type	Sponsored Projects			Project Status	Current
Budget	Direct Budget:	358,900.61	Indirect Budget:	200,983.92	Total Budget: 559,884.53
Principal Investigator/Client	Sonalde Desai (University of Maryland) Stephanie Chardoul (University of Michigan ) Santanu Pramanik (National Council of Applied Economic Research)				
Funding Agency	National Institutes of Health, Department of Health and Human Services				
IRB	HUM#:		Period Of Approval:		
Project Team	Project Lead:	Gina-Qian Yang Cheung			
	Budget Analyst:	Ryan Neice			
	Production Manager:				
	Senior Project Advisor:	Stephanie A Chardoul			
	Production Manager:	Sarah Elisa Broumand			
	Production Manager:	Jennifer M Kelley			
Proposal #:	no data				
Description:	The India Human Development Survey (IHDS) is a nationally representative, multi-topic, longitudinal survey of 41,554 households in 1503 villages and 971 urban neighborhoods across India. The first round of interviews were completed in 2004-5; data are publicly available through ICPSR. A second round of IHDS reinterviewed most of these households in 2011-12 (N=42,152). SRC joins IHDS Wave 3 to automate data collection, the scope of work includes methodological design, sample design, questionnaire design, technical instrument design, supervisor/interviewer training, production monitoring, quality control, data dissemination, and 2-3 weekly conference calls for capacity building.				
SRO Project Period	01/2019 - 03/2024				
Data Col Period	05/2022 - 10/2023				
Security Plan	NA				
Milestone Dates	PreProduction Start:		Pretest Start:		
	Pretest End:		Recruitment Start:		
	Staffing Completed:		GIT Start:		
	SS Train Start:		SS Train End:		
	DC Start:		DC End:		
Other Project Team Members:	Project Management Team Stephanie Chardoul -- Senior Project Advisor (SPA) Gina Cheung - Lead Project Manager and Tech Lead Sarah Broumand - Project Manager Jennifer Kelley - Project Manager  Programming Team Collette Keyser - Blaise Marsha Skoman - SurveyTrak Holly Ackerman - WebTrak Cheng Zhou - Sync  HelpDesk Team Emmanuel Ellis John  Data Manager Team Sarah E Jennie				



**Other Project****Names:**

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

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**Report Period** July, 2022 (IHDS3) **Project Phase** Initiation  
**Risk Level** On Track  
**Monthly Update** Aengncy 03 trained and launched and solved a few data collection issues. Still testing migrant project

**Special Issues**

**Cost**  
**Aug 14, 2022**

<i>Total Cost to Date (Direct + Indirect):</i>	428,326.15
<i>Estimated Cost at Completion (E\$AC):</i>	559,827.73
<i>Total Budget:</i>	559,884.53
<i>Variance (Budget minus E\$AC):</i>	56.80
<i>Reason For Variance:</i>	on tracking with the budget

**Projections**  
**Aug 14, 2022**

<i>Dollars Projected For Month:</i>	19,228.86
<i>Actual Dollars Used:</i>	20,801.26
<i>Variance (Projected minus Actual):</i>	-1,572.40
<i>Reason For Variance:</i>	no reasons

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

**Other Measures**

Project Name	(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

<b>Report Period</b>	July, 2022 (MI CReSS (Year 2))	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	<i>Attention!</i>		
<b>Monthly Update</b>	<p>We are onboarding and training another 4 interviewers this week, to respond to staff turnover and fill in the various gaps on the project. It was recommended, as insurance against ST's constantly-changing availability and statuses to:</p> <ol style="list-style-type: none"> <li>1) Combine the Interviewing / Mailing / Locating / Logging / Emailing tasks into ONE POSITION</li> <li>2) Overstaff: Post for 4 staff</li> <li>3) Make the hours variable, 8 - 24 per week</li> </ol> <p>The approach ensures we'll have a sufficient number of staff hours and they can be used interchangeably. We're hopeful with this approach.</p> <p>Sample replicate 7 was released last week and we are settling into a routine, monthly release of sample replicates to production.</p>		
<b>Special Issues</b>	<p>We learned a few weeks ago that MDHHS (project sponsor) has authorized the PI to request FY1 (2020-21) carryforward funds. Because SRO's scope of work shifted to FY2 (2021-22), there were over \$50K in unused funds in the FY1 budget and we currently have a projected overrun in the FY2 budget. We welcomed this positive news from the PI / project's sponsor and will be working with the SPH financial manager on next steps.</p> <p>Also, Rolfe is reviewing the PI's request (email sent to Bill and Terri on 8/11/22); we are waiting to meet with Rolfe to discuss his concerns and prepare a response to the PI's request:</p> <p>Hi Terri and Bill,</p> <p>The mechanism by which we are paid for MI CReSS from MDHHS will be changing from a grant to a contract for FY23 (starting Oct 1). I'm attaching the draft contract, which we are in the process of revising, to let you know the type of document we need to finalize in the next few weeks.</p> <p>Two requests:</p> <ol style="list-style-type: none"> <li>1. Please discuss to determine what types of units and unit rates we can use for the SRO portion of the budget, ideally by the end of next week.</li> <li>2. Please review your budget for next year given the cost overruns this year, as we will likely not have the flexibility next year to absorb cost overruns the way we did this year. Instead, we will need to make programmatic decisions to contain costs.</li> </ol> <p>I am out of the office for the next 2 weeks, but will have flexibility to address this next week as needed. Jana and Cathy will text me when I need to address things that come up, so please copy them on your messages.</p> <p>Thank you, Nancy</p>		
<b>Cost</b>			
<b>Aug 16, 2022</b>	<b>Total Cost to Date (Direct + Indirect):</b>	383,952.07	
	<b>Estimated Cost at Completion (E\$AC):</b>	457,293.02	
	<b>Total Budget:</b>	429,680.00	
	<b>Variance (Budget minus E\$AC):</b>	-27,613.02	

**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**  
**Aug 16, 2022**

**Dollars Projected For Month:** 41,572.53  
**Actual Dollars Used:** 42,530.32  
**Variance (Projected minus Actual):** -957.79  
**Reason For Variance:**

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>	1,915 (Rel 1-7)	80% (60%-Web/40%Tel)	2.25
<b>Goal at Completion:</b>		80% (60%-Web/40%Tel)	
<b>Current actual:</b>	1,571	67% (66%-Web/34% Tel)	3.88
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

**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

<b>Project Name</b>	(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027											
<b>Project Mode</b>	Primary: Class SAQ      Total of Modes: 1											
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current								
<b>Budget</b>	<b>Direct Budget:</b>	6,267,988.00	<b>Indirect Budget:</b>	3,510,072.00 <b>Total Budget:</b> 9,778,060.00								
<b>Principal Investigator/Client</b>	Richard Miech (SRC)											
<b>Funding Agency</b>	National Institute on Drug Abuse, one of the National Institutes of Health.											
<b>IRB</b>	<b>HUM#:</b>	00217920	<b>Period Of Approval:</b>	from 7/20/22 No CR								
<b>Project Team</b>	<b>Project Lead:</b>	Rebecca Gatward										
	<b>Budget Analyst:</b>	Dean E Stevens										
	<b>Production Manager:</b>	Margaret Lavanger										
	<b>Senior Project Advisor:</b>	Gregg Peterson										
	<b>Production Manager:</b>	James Koopman										
	<b>Production Manager:</b>											
<b>Proposal #:</b>	no data											
<b>Description:</b>	<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.. <a href="http://www.monitoringthefuture.org/">http://www.monitoringthefuture.org/</a></p>											
<b>SRO Project Period</b>	04/2022 - 03/2027											
<b>Data Col Period</b>	04/2022 - 03/2027											
<b>Security Plan</b>	Yes											
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center; vertical-align: top;"> <b>PreProduction Start:</b>  <b>Pretest End:</b>  <b>Staffing Completed:</b>  <b>SS Train Start:</b>  <b>DC Start:</b> </td> <td style="width: 50%; text-align: center; vertical-align: top;"> <b>Pretest Start:</b>  <b>Recruitment Start:</b>  <b>GIT Start:</b>  <b>SS Train End:</b>  <b>DC End:</b> </td> </tr> </table>				<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b>	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>						
<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b>	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>											
<b>Other Project Team Members:</b>	<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** July, 2022 (MTF Base Year 2022\_27) **Project Phase** Implementing

**Risk Level** On Track

**Monthly Update** July 2022  
 - review list of changes/updates to systems, protocols for 2023  
 - schedule created for 2023  
 - close out of 2022 interviewers and TLs completed

**Special Issues**

**Cost**  
**Aug 14, 2022**

<b>Total Cost to Date (Direct + Indirect):</b>	347,480.63
<b>Estimated Cost at Completion (E\$AC):</b>	9,128,427.65
<b>Total Budget:</b>	9,778,060.00
<b>Variance (Budget minus E\$AC):</b>	649,632.35
<b>Reason For Variance:</b>	The underspend is based on a first version of projections for the new five year funding period. We will work on refining these based on outcomes from this year (the first with remote and FTF survey administrations). The PG funding amount etc. was not received unto end April and then hours transferred from a temporary short code to the new code.

**Projections**  
**Aug 14, 2022**

<b>Dollars Projected For Month:</b>	72,484.05
<b>Actual Dollars Used:</b>	31,149.32
<b>Variance (Projected minus Actual):</b>	41,334.73
<b>Reason For Variance:</b>	Team members were OOTO/busy with other projects so hours projected were not used. The projections were also estimates - these are currently being reviewed and updated.

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

**Other Measures**

<b>Project Name</b>	(MTF HID 22) MTF High Intensity Drinking 2022				
<b>Project Mode</b>	Primary: Web      Total of Modes: 1				
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current		
<b>Budget</b>	<b>Direct Budget:</b> 301,160.00	<b>Indirect Budget:</b> 167,822.00	<b>Total Budget:</b> 468,982.00		
<b>Principal Investigator/Client</b>	Megan Patrick (University of Michigan)				
<b>Funding Agency</b>					
<b>IRB</b>	<b>HUM#:</b> 00159183	<b>Period Of Approval:</b>	2/2/2022		
<b>Project Team</b>	<b>Project Lead:</b> Donnalee Ann Grey-Farquharson <b>Budget Analyst:</b> Parina Kamdar <b>Production Manager:</b> Hongyu Johnson <b>Senior Project Advisor:</b> Kirsten Haakan Alcser <b>Production Manager:</b> <b>Production Manager:</b>				
<b>Proposal #:</b>	no data				
<b>Description:</b>	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.				
<b>SRO Project Period</b>	10/2021 - 07/2022				
<b>Data Col Period</b>	02/2022 - 04/2022				
<b>Security Plan</b>	NA				
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> <b>PreProduction Start:</b>  <b>Pretest End:</b>  <b>Staffing Completed:</b>  <b>SS Train Start:</b>  <b>DC Start:</b> </td> <td style="padding: 5px;"> <b>Pretest Start:</b>  <b>Recruitment Start:</b>  <b>GIT Start:</b>  <b>SS Train End:</b>  <b>DC End:</b> </td> </tr> </table>			<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b>	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>
<b>PreProduction Start:</b> <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b>	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b>				
<b>Other Project Team Members:</b>	Kirsten Alcser, Donnalee Grey-Farquharson, Hueichun Peng, Hongyu Johnson, Minako Edgar				
<b>Other Project Names:</b>					
<b>Sample Mgmt Sys</b>	Web SMS				
<b>Data Col Tool</b>	Illume				
<b>Hardware</b>	NA				
<b>DE Software</b>	NA				
<b>QC Recording Tool</b>	NA				
<b>Incentive</b>	Yes, R				
<b>Administration</b>	ISR Group (MTF Study Satff)				
<b>Payment Type</b>	Check, post (varies \$40 - \$100); Other (Tango Card)				
<b>Payment Method</b>	Imprest Cash Fund from ISR Business Office; Other (Tango Card)				

<b>Report Period</b>	July, 2022 (MTF HID 22)	<b>Project Phase</b>	Closing
<b>Risk Level</b>	On Track		
<b>Monthly Update</b>	Management:		

- Final data delivery is complete
- Start working on documentation tasks for closing the project

Technical system:

- N/A

Data Collection - Production ended in April 2022.

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

#### Special Issues

##### Cost

Jul 31, 2022

<b>Total Cost to Date (Direct + Indirect):</b>	328,321.25
<b>Estimated Cost at Completion (E\$AC):</b>	334,123.22
<b>Total Budget:</b>	468,982.00
<b>Variance (Budget minus E\$AC):</b>	134,858.78
<b>Reason For Variance:</b>	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 Aug,2022.

##### Projections

Jul 31, 2022

<b>Dollars Projected For Month:</b>	1,335.74
<b>Actual Dollars Used:</b>	1,253.13
<b>Variance (Projected minus Actual):</b>	82.61
<b>Reason For Variance:</b>	The data collection ended in April 2022. The project staff mainly worked on post-data collection activities. The underrun amount will be adjusted in Aug 2022.

#### Measures

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

#### Other Measures



**Project Name** (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**

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

**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** July, 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

## 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 06/30/2022: Total Sample: 17708.

Total completes=7350, RR=41.51%

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

## Special Issues

## Cost

Jul 31, 2022

<b>Total Cost to Date (Direct + Indirect):</b>	330,652.07
<b>Estimated Cost at Completion (E\$AC):</b>	3,906,222.14
<b>Total Budget:</b>	3,895,217.00
<b>Variance (Budget minus E\$AC):</b>	-11,005.14
<b>Reason For Variance:</b>	

## Projections

Jul 31, 2022

<b>Dollars Projected For Month:</b>	132,855.02
<b>Actual Dollars Used:</b>	140,553.21
<b>Variance (Projected minus Actual):</b>	-7,698.19
<b>Reason For Variance:</b>	

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

## Other Measures

**Project Name** (PSID TAS 2021) Transition to Adulthood within its Life Course & Intergenerational Family Context

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

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

**Budget** **Direct Budget:** 832,983.88 **Indirect Budget:** 466,470.97 **Total Budget:** 1,299,454.85

**Principal Investigator/Client** Narayan Sastry (U-M PSC SRC)

**Funding Agency** NIH

**IRB** **HUM#:** HUM00112629 **Period Of Approval:** 7/14/2021 - 7/13/202

**Project Team** **Project Lead:** Piotr Dworak  
**Budget Analyst:** Megan Gomez-Mesquita  
**Production Manager:** Elizabeth Ohryn  
**Senior Project Advisor:** Stephanie A Chardoul  
**Production Manager:** Daric Thorne  
**Production Manager:**

**Proposal #:** no data

**Description:** TAS 2021 is the 9th Wave of TAS study, part of the PSID Suite of projects.

Approximately 3,000 youth aged 18 – 28 years who are part of families who participate in the ongoing Panel Study of Income Dynamics (PSID) are invited to take part in a 60-minute web survey. In 2021, all respondents go through the same sequential treatment - non-responders to web survey are called as part of the non-response follow up. Respondents will be offered a up to \$100 for completing the interview which includes a \$75 base payment and possible other interventions. Phone interviews will be completed by a mix of Field and Survey Research Center Survey Services Lab (SSL) interviewers.

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

**Data Col Period** 09/2021 - 06/2022

**Security Plan** NA

**Milestone Dates**

<b>PreProduction Start:</b> 05/01/2021	<b>Pretest Start:</b> 05/01/2021
<b>Pretest End:</b> 08/01/2021	<b>Recruitment Start:</b> 08/30/2021
<b>Staffing Completed:</b> 09/07/2021	<b>GIT Start:</b> 09/15/2021
<b>SS Train Start:</b> 09/30/2021	<b>SS Train End:</b> 10/01/2021
<b>DC Start:</b> 09/30/2021	<b>DC End:</b> 06/30/2022

**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** July, 2022 (PSID TAS 2021) **Project Phase** Closing

**Risk Level** On Track

**Monthly Update** TAS 2021 data collection ended last month (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.

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

Aug 14, 2022

**Total Cost to Date (Direct + Indirect):** 1,360,939.93

**Estimated Cost at Completion (E\$AC):** 1,370,543.21

**Total Budget:** 1,299,454.85

**Variance (Budget minus E\$AC):** -71,088.36

**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

Aug 14, 2022

**Dollars Projected For Month:** 84,202.08

**Actual Dollars Used:** 92,701.74

**Variance (Projected minus Actual):** -8,499.66

**Reason For Variance:**

More interviewer time was used during the final end-game Small variance due to management / iwer time.

#### Measures

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

#### Other Measures

<b>Project Name</b>	(PSID23 Online Contact Update) Panel Study of Income Dynamics 2023 Online Contact Update												
<b>Project Mode</b>	Primary: Web    Total of Modes: 1												
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current										
<b>Budget</b>	<b>Direct Budget:</b> 47,456.00	<b>Indirect Budget:</b> 0.00	<b>Total Budget:</b> 47,456.00										
<b>Principal Investigator/Client</b>	Katherine McGonagle (PSID)												
<b>Funding Agency</b>	NSF, NIA, NICHD, The Office of the Assistant Secretary for Planning and Evaluation of the United States, DHHS, The Econom												
<b>IRB</b>	<b>HUM#:</b> HUM00062417	<b>Period Of Approval:</b>	3/22/22-3/21/23										
<b>Project Team</b>	<b>Project Lead:</b> Camila Kendall <b>Budget Analyst:</b> Megan Gomez-Mesquita <b>Production Manager:</b> <b>Senior Project Advisor:</b> Stephanie A Chardoul <b>Production Manager:</b> <b>Production Manager:</b>												
<b>Proposal #:</b>	no data												
<b>Description:</b>	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.												
<b>SRO Project Period</b>	04/2022 - 12/2022												
<b>Data Col Period</b>	06/2022 - 12/2022												
<b>Security Plan</b>	NA												
<b>Milestone Dates</b>	<table border="1" style="width: 100%;"> <tr> <td><b>PreProduction Start:</b> 04/01/2022</td> <td><b>Pretest Start:</b></td> </tr> <tr> <td><b>Pretest End:</b></td> <td><b>Recruitment Start:</b></td> </tr> <tr> <td><b>Staffing Completed:</b></td> <td><b>GIT Start:</b></td> </tr> <tr> <td><b>SS Train Start:</b></td> <td><b>SS Train End:</b></td> </tr> <tr> <td><b>DC Start:</b> 07/01/2022</td> <td><b>DC End:</b> 11/30/2022</td> </tr> </table>			<b>PreProduction Start:</b> 04/01/2022	<b>Pretest Start:</b>	<b>Pretest End:</b>	<b>Recruitment Start:</b>	<b>Staffing Completed:</b>	<b>GIT Start:</b>	<b>SS Train Start:</b>	<b>SS Train End:</b>	<b>DC Start:</b> 07/01/2022	<b>DC End:</b> 11/30/2022
<b>PreProduction Start:</b> 04/01/2022	<b>Pretest Start:</b>												
<b>Pretest End:</b>	<b>Recruitment Start:</b>												
<b>Staffing Completed:</b>	<b>GIT Start:</b>												
<b>SS Train Start:</b>	<b>SS Train End:</b>												
<b>DC Start:</b> 07/01/2022	<b>DC End:</b> 11/30/2022												
<b>Other Project Team Members:</b>	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												
<b>Other Project Names:</b>													
<b>Sample Mgmt Sys</b>	MSMS												
<b>Data Col Tool</b>	Blaise 5												
<b>Hardware</b>	NA												
<b>DE Software</b>	NA												
<b>QC Recording Tool</b>	NA												
<b>Incentive</b>	Yes, R												
<b>Administration</b>	ISR Group (PSID)												
<b>Payment Type</b>	Check, post (\$10); Other (electronic, post--JP Morgan)												
<b>Payment Method</b>	Check through other system (PSID staff will handle check & e-payment via RAPS)												

<b>Report Period</b>	July, 2022 (PSID23 Online Contact Upc	<b>Project Phase</b>	Initiation
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<b>Risk Level</b>	On Track
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<b>Monthly Update</b>	The project was moved to a new URL to prevent server issues.
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Blaise programming continued. PSID requested that the programmers implement a flag that indicated whether any

information had been changed. Project moved from SQLite to SQL server. SRO worked with PSID to create a new SID structure specific to the Online Contact Update project -- solved the issue of duplicate SIDs across TAS and PSID sample (for different respondents).

Timeline was revised -- launch date was delayed until August 8th.

**Special Issues**

<b>Cost</b> Jul 12, 2022	<b>Total Cost to Date (Direct + Indirect):</b>	33,916.32	
	<b>Estimated Cost at Completion (E\$AC):</b>	48,271.51	
	<b>Total Budget:</b>	47,456.00	
	<b>Variance (Budget minus E\$AC):</b>	-815.51	
	<b>Reason For Variance:</b>	Project has been more complicated than expected. Required additional programming resources that were not projected to help fix bugs.	

<b>Projections</b> Jul 12, 2022	<b>Dollars Projected For Month:</b>	13,325.50	
	<b>Actual Dollars Used:</b>	18,750.78	
	<b>Variance (Projected minus Actual):</b>	5,425.28	
	<b>Reason For Variance:</b>	Programmers charged more than projected.	

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

**Other Measures**

<b>Project Name</b>	(PSID23) Panel Study of Income Dynamics Core 2023					
<b>Project Mode</b>	Primary: Web    Secondary: Telephone    Total of Modes: 2					
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current		
<b>Budget</b>	<b>Direct Budget:</b>	5,030,748.00	<b>Indirect Budget:</b>	2,817,218.00 <b>Total Budget:</b> 7,847,966.00		
<b>Principal Investigator/Client</b>	Katherine McGonagle (UM-SRC-PSID) Narayan Sastry (UM-SRC-PSID) Esther Friedman (UM-SRC-PSID)					
<b>Funding Agency</b>						
<b>IRB</b>	<b>HUM#:</b>	HUM00062417	<b>Period Of Approval:</b>	3/22/22-3/21/23		
<b>Project Team</b>	<b>Project Lead:</b>	Rachel Anne Orłowski				
	<b>Budget Analyst:</b>	Ivanna Iavorska-Em				
	<b>Production Manager:</b>	Stacy Quisenberry				
	<b>Senior Project Advisor:</b>	Stephanie A Chardoul				
	<b>Production Manager:</b>	Daric Thorne				
	<b>Production Manager:</b>	Shonda R Kruger-Ndiaye				
<b>Proposal #:</b>	no data					
<b>Description:</b>	<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>					
<b>SRO Project Period</b>	03/2022 - 03/2024					
<b>Data Col Period</b>	03/2013 - 12/2023					
<b>Security Plan</b>	NA					
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> <b>PreProduction Start:</b> 03/01/2022  <b>Pretest End:</b> 10/24/2022  <b>Staffing Completed:</b>  <b>SS Train Start:</b>  <b>DC Start:</b> 03/01/2023 </td> <td style="width: 50%; vertical-align: top;"> <b>Pretest Start:</b> 10/03/2022  <b>Recruitment Start:</b>  <b>GIT Start:</b>  <b>SS Train End:</b>  <b>DC End:</b> 12/31/2023 </td> </tr> </table>				<b>PreProduction Start:</b> 03/01/2022 <b>Pretest End:</b> 10/24/2022 <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b> 03/01/2023	<b>Pretest Start:</b> 10/03/2022 <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b> 12/31/2023
<b>PreProduction Start:</b> 03/01/2022 <b>Pretest End:</b> 10/24/2022 <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b> 03/01/2023	<b>Pretest Start:</b> 10/03/2022 <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b> 12/31/2023					
<b>Other Project Team Members:</b>						

<b>Other Project Names:</b>	PSID Core 2023
<b>Sample Mgmt Sys</b>	MSMS
<b>Data Col Tool</b>	Blaise 5
<b>Hardware</b>	Laptop; [UM cell] Phone
<b>DE Software</b>	N/A
<b>QC Recording Tool</b>	Camtasia
<b>Incentive</b>	Yes, R; Yes, Other (Locator, Proxy)
<b>Administration</b>	ISR Group (PSID)
<b>Payment Type</b>	Check, post (Varies); Cash, post (Varies); Other (electronic, post--JP Morgan)
<b>Payment Method</b>	Check through other system (PSID will handle check & e-payment via RAPS); Interviewer payment of cash (reir

<b>Report Period</b>	July, 2022 (PSID23)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	<i>On Track</i>		
<b>Monthly Update</b>	<p>Prepared for Pretest integration testing to begin the first week in August. CMT/Blaise Admin set up the PSID testing environment--upgraded the server to Blaise 5.11.5 and updated the operating system from Windows Server 2012 to Windows Server 2019 on July 28; also moved database storage mechanism from SQLite to SQL Server. The Blaise compiled version remained in 5.8--the most current version (5.8.20). Note - PSID 2021 used a 5.8.12 server set with 5.8.6 compiled version.</p> <p>Reported that most of the MSMS set-up was programmed prior to the transition from Kyle to Pam (first week of August). Summary of key MSMS project set-up changes from 2021 to 2023: Added line scooping off of iwers' laptops upon line finalization. Simplified rules by reducing the number of conditions to process. Simplified email and text workflow. Simplified TL review process. Simplified code out process. Created new rules dedicated to the letter request process. Built a respondent selection option to allow for ease of emailing and texting. Built iwer notification from TLs and toll-free line. Built structure to determine the reason a line is on hold.</p> <p>English CATI and web Blaise programming and CTT testing continued. Programmed new FES web banner. Continued to design 68ID site to include team locating. Prepared test lines after thorough review of data spec. Reviewed and updated testing plan. Tested the self scheduler as a standalone application. Determined Spanish web (new mode of administration for 2023) programming workflow. Began review of reporting needs. Tested new ODS process for providing updated MSMS data to the Mapping Tool.</p> <p>Discussed sample assignment and reshuffle. Confirmed Pretest interviewers' interest and availability. Determined Pretest recruitment criteria and data collection protocol.</p>		
<b>Special Issues</b>	DCA Sync updates (MSMS-4584) not available until October 1. 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. Screen design to be tested during Pretest but not functionality. If MSMS Core development not done, bulk messaging will need to be re-specified.		
<b>Cost Aug 12, 2022</b>	<p><b>Total Cost to Date (Direct + Indirect):</b> 139,384.96</p> <p><b>Estimated Cost at Completion (E\$AC):</b> 5,058,190.98</p> <p><b>Total Budget:</b> 7,847,966.00</p> <p><b>Variance (Budget minus E\$AC):</b> -27,442.98</p> <p><b>Reason For Variance:</b> Primarily driven by assigned vs. budgeted resources due to staff departures (MSMS set-up programmer and DMSS research specialist now projected at higher levels) and adding TL involvement in pre-production. Note: Working w/ U-M Sponsored Programs to resolve an IDC reporting issue. Cost values only reflect Direct Costs (budgeted amt: \$5,030,748).</p>		
<b>Projections Aug 12, 2022</b>	<p><b>Dollars Projected For Month:</b> 56,631.30</p> <p><b>Actual Dollars Used:</b> 42,841.65</p> <p><b>Variance (Projected minus Actual):</b> 13,789.65</p> <p><b>Reason For Variance:</b> Mainly due to managers and programmers charging fewer hours than projected. Note: Working w/ U-M Sponsored Programs to resolve an IDC reporting issue. Cost values only reflect Direct Costs.</p>		



Measures	Units Complete			RR	HPI
	<b>Current Goal:</b>			89%	6.58
	<b>Goal at Completion:</b>				
	<b>Current actual:</b>				
	<b>Estimate at Complete:</b>				
	<b>Variance:</b>				

**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.

<b>Project Name</b>	(PSID-PR) Puerto Rico Panel Study of Income Dynamics				
<b>Project Mode</b>	Primary: Face to Face	Secondary: Telephone	Total of Modes: 2		
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current		
<b>Budget</b>	<b>Direct Budget:</b> 828,581.00	<b>Indirect Budget:</b> 464,004.00	<b>Total Budget:</b> 1,292,585.00		
<b>Principal Investigator/Client</b>	Narayan Sastry (University of Michigan) Elizabeth Fussel (Brown University)				
<b>Funding Agency</b>	NICHD, with supplemental funding being sought from NIA				
<b>IRB</b>	<b>HUM#:</b> HUM00197300	<b>Period Of Approval:</b>	4/5/2022-4/4/2023		
<b>Project Team</b>	<b>Project Lead:</b> Shonda R Kruger-Ndiaye <b>Budget Analyst:</b> Ivanna Iavorska-Em <b>Production Manager:</b> <b>Senior Project Advisor:</b> Stephanie A Chardoul <b>Production Manager:</b> Camila Kendall <b>Production Manager:</b>				
<b>Proposal #:</b>	no data				
<b>Description:</b>	<p>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.</p>				
<b>SRO Project Period</b>	01/2022 - 12/2023				
<b>Data Col Period</b>	NA				
<b>Security Plan</b>					
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> <b>PreProduction Start:</b> 10/01/2021  <b>Pretest End:</b>  <b>Staffing Completed:</b>  <b>SS Train Start:</b>  <b>DC Start:</b> </td> <td style="padding: 5px;"> <b>Pretest Start:</b>  <b>Recruitment Start:</b>  <b>GIT Start:</b>  <b>SS Train End:</b>  <b>DC End:</b> 12/31/2023 </td> </tr> </table>			<b>PreProduction Start:</b> 10/01/2021 <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b>	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b> 12/31/2023
<b>PreProduction Start:</b> 10/01/2021 <b>Pretest End:</b> <b>Staffing Completed:</b> <b>SS Train Start:</b> <b>DC Start:</b>	<b>Pretest Start:</b> <b>Recruitment Start:</b> <b>GIT Start:</b> <b>SS Train End:</b> <b>DC End:</b> 12/31/2023				
<b>Other Project Team Members:</b>	Marsha Skoman--Tech Lead Raphael Nishimura--Sampling				
<b>Other Project Names:</b>					
<b>Sample Mgmt Sys</b>	SurveyTrak				
<b>Data Col Tool</b>	Blaise 4.8				
<b>Hardware</b>	Laptop				
<b>DE Software</b>	N/A				
<b>QC Recording Tool</b>	Camtasia				
<b>Incentive</b>	Yes, R; Yes, INF				
<b>Administration</b>	Other (ETI (Puerto Rican Survey Firm))				
<b>Payment Type</b>	Check, post (Varies by study phase); Cash, post (Varies by study phase)				
<b>Payment Method</b>	Other (Via ETI Systems)				

<b>Report Period</b>	July, 2022 (PSID-PR)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	On Track		
<b>Monthly Update</b>	<p>Listing preload prep, carried out by UPR students is on-going -- targeting 7/22 completion, but progress is slower than anticipated.</p> <p>Received additional list of addresses and GPS coordinates from LUMA data -- too late to incorporate into listing preload prep. Can be used to supplement listing data during post-production. PSID-PR and PR-POP agreed to</p>		

schedule listing training for late Sept or early Oct. Exact dates TBD. GIS application testing is on-going. SRO set up PR collaborators to start testing Field Maps in PR.

PSID PIs coordinating with ETI to set up funding for NICHD scope. May trigger the need for human subjects training, or to document the future training plan. SRO exploring options for existing human subjects trainings in Spanish that are equivalent to PEERRs.

SRO provided PIs revised translation estimate for training materials. Instrument translation cost TBD.

Pretest planning underway. PSID PR instrument is dependent on Core 23 Spanish instrument -- PSID PR and Core are coordinating to prioritize Spanish development earlier.

#### 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 Aug 12, 2022

<b>Total Cost to Date (Direct + Indirect):</b>	53,755.40
<b>Estimated Cost at Completion (E\$AC):</b>	1,261,134.77
<b>Total Budget:</b>	1,292,585.00
<b>Variance (Budget minus E\$AC):</b>	31,450.23
<b>Reason For Variance:</b>	Projected underrun due to positive variance in research area specialists and research computer specialist categories. Other category projections will be updated in future months and underrun will likely be eliminated.

#### Projections Aug 12, 2022

<b>Dollars Projected For Month:</b>	21,274.63
<b>Actual Dollars Used:</b>	19,339.73
<b>Variance (Projected minus Actual):</b>	1,934.90
<b>Reason For Variance:</b>	Programmers and Management staff charged less than projected.

#### Measures

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

#### Other Measures

**Project Name** (SCA 2022) Surveys of Consumer Attitudes

**Project Mode** Primary: Telephone Total of Modes: 1

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

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

**Principal Investigator/Client** Joanne Hsu (SCA)  
Tuba Suzer-Gurtekin (SCA)

**Funding Agency**

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

**Project Team** **Project Lead:** Theresa Camelo  
**Budget Analyst:** Dean E Stevens  
**Production Manager:** Lisa J 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**

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

**Risk Level** On Track

**Monthly Update** SCA JUL22 began as scheduled on WED June 22, and ended as scheduled on MON July 25. We completed 601 (321/180/100) IWs for the month (exceeding the monthly goals of 600:320/180/100 by 1 IWs) - at a cumulative HPI of 2.79 (0.21 below the budgeted goal of 3.0).

**Special Issues****Cost**

Aug 14, 2022

**Total Cost to Date (Direct + Indirect):** 685,873.74  
**Estimated Cost at Completion (E\$AC):** 1,205,322.18  
**Total Budget:** 1,251,758.00  
**Variance (Budget minus E\$AC):** 46,435.82  
**Reason For Variance:** Reduced hpi

**Projections**

Aug 14, 2022

**Dollars Projected For Month:** 138,375.28  
**Actual Dollars Used:** 121,694.89  
**Variance (Projected minus Actual):** 16,680.39  
**Reason For Variance:** Reduced hpi, and lower than expected training costs at budgeting.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>	600		3.0
<b>Goal at Completion:</b>	600		3.0
<b>Current actual:</b>	600		2.79
<b>Estimate at Complete:</b>	601		2.79
<b>Variance:</b>	1		-0.21

**Other Measures**

<b>Project Name</b>	(SCIP 2021) Sustainability Culture Indicators Project												
<b>Project Mode</b>	Primary: Not Available												
<b>Project Type</b>	Sponsored Projects	<b>Project Status</b>	Current										
<b>Budget</b>	<b>Direct Budget:</b> 126,000.00	<b>Indirect Budget:</b> 0.00	<b>Total Budget:</b> 126,000.00										
<b>Principal Investigator/Client</b>	John Callewaert, PI (SRC, Graham Sustainability Institute) Robert Marans, Co-PI (SRC) Noah Webster, Co-PI (SRC)												
<b>Funding Agency</b>													
<b>IRB</b>	<b>HUM#:</b> HUM00204955	<b>Period Of Approval:</b>	9/2021-9/2026										
<b>Project Team</b>	<b>Project Lead:</b> Maureen Joan O'Brien <b>Budget Analyst:</b> Carl S Remmert <b>Production Manager:</b> <b>Senior Project Advisor:</b> Andrew L Hupp <b>Production Manager:</b> <b>Production Manager:</b>												
<b>Proposal #:</b>	no data												
<b>Description:</b>	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.												
<b>SRO Project Period</b>	09/2021 - 09/2026												
<b>Data Col Period</b>	10/2021 - 12/2021												
<b>Security Plan</b>	NA												
<b>Milestone Dates</b>	<table border="1" style="width: 100%;"> <tr> <td><b>PreProduction Start:</b> 08/15/2021</td> <td><b>Pretest Start:</b></td> </tr> <tr> <td><b>Pretest End:</b></td> <td><b>Recruitment Start:</b></td> </tr> <tr> <td><b>Staffing Completed:</b></td> <td><b>GIT Start:</b></td> </tr> <tr> <td><b>SS Train Start:</b></td> <td><b>SS Train End:</b></td> </tr> <tr> <td><b>DC Start:</b> 10/13/2021</td> <td><b>DC End:</b> 12/15/2021</td> </tr> </table>			<b>PreProduction Start:</b> 08/15/2021	<b>Pretest Start:</b>	<b>Pretest End:</b>	<b>Recruitment Start:</b>	<b>Staffing Completed:</b>	<b>GIT Start:</b>	<b>SS Train Start:</b>	<b>SS Train End:</b>	<b>DC Start:</b> 10/13/2021	<b>DC End:</b> 12/15/2021
<b>PreProduction Start:</b> 08/15/2021	<b>Pretest Start:</b>												
<b>Pretest End:</b>	<b>Recruitment Start:</b>												
<b>Staffing Completed:</b>	<b>GIT Start:</b>												
<b>SS Train Start:</b>	<b>SS Train End:</b>												
<b>DC Start:</b> 10/13/2021	<b>DC End:</b> 12/15/2021												
<b>Other Project Team Members:</b>	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												
<b>Other Project Names:</b>													
<b>Sample Mgmt Sys</b>	Project specific system (Qualtrics)												
<b>Data Col Tool</b>	Other (Qualtrics)												
<b>Hardware</b>	NA												
<b>DE Software</b>	N/A												
<b>QC Recording Tool</b>	N/A												
<b>Incentive</b>	Yes, R												
<b>Administration</b>	NA												
<b>Payment Type</b>	Other (Amazon)												
<b>Payment Method</b>	Other (via Email)												

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<b>Report Period</b>	July, 2022 (SCIP 2021)	<b>Project Phase</b>	Closing
<b>Risk Level</b>	On Track		
<b>Monthly Update</b>	The final Flint dataset was completed and has been merged with the other datasets (Ann Arbor, Dearborn) for the PIs. All activity on the project should be done, aside from possible follow-up questions from the PI. A DMSS staffperson has been identified to assist in the absence of the SCIP data manager.		
<b>Special Issues</b>			

**Cost**

<i>Total Cost to Date (Direct + Indirect):</i>	82,462.09
<i>Estimated Cost at Completion (E\$AC):</i>	82,462.09
<i>Total Budget:</i>	126,000.00
<i>Variance (Budget minus E\$AC):</i>	43,537.91
<i>Reason For Variance:</i>	52k has been transferred back to the PI's due to overfunding, but this does not currently show on the cost report.

**Projections**

<i>Dollars Projected For Month:</i>	2,816.50
<i>Actual Dollars Used:</i>	2,126.38
<i>Variance (Projected minus Actual):</i>	690.12
<i>Reason For Variance:</i>	Not all hours needed

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

**Other Measures**

<b>Project Name</b>	(STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study					
<b>Project Mode</b>	Primary: Web    Secondary: Telephone    Total of Modes: 2					
<b>Project Type</b>	Sponsored Projects		<b>Project Status</b>	Current		
<b>Budget</b>	<b>Direct Budget:</b>	8,196,521.00	<b>Indirect Budget:</b>	4,590,892.00 <b>Total Budget:</b> 12,809,390.00		
<b>Principal Investigator/Client</b>	James Wagner (University of Michigan) Robert Ursano (Uniformed Services University of the Health Scienc) Murray Stein / Ron Kessler (University of California San Diego / Harvard)					
<b>Funding Agency</b>	Department of Defense					
<b>IRB</b>	<b>HUM#:</b>	HUM00180765	<b>Period Of Approval:</b>	4/21/22 - 4/20/23		
<b>Project Team</b>	<b>Project Lead:</b>	Meredith A House				
	<b>Budget Analyst:</b>	William Lokers				
	<b>Production Manager:</b>	Ruth B Philippou				
	<b>Senior Project Advisor:</b>	Lisa S Holland				
	<b>Production Manager:</b>	Jeffrey Albrecht Jr				
	<b>Production Manager:</b>	Lisa M Lewandowski-Romps				
<b>Proposal #:</b>	no data					
<b>Description:</b>	<p>This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.</p> <p>For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data.</p> <p>To date, we have completed 2 waves of STARRS-LS interviewing. During Wave 1, we attempted to contact 50,000 individuals and completed approximately 14,500 full interviews. All Wave 1 participants that completed a full Wave 1 interview were asked to participate in Wave 2. Waves 3 and 4, which are covered in this application, will include the full STARRS-LS Wave 2 sample, regardless of whether they completed the interview.</p> <p>In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys).</p>					
<b>SRO Project Period</b>	05/2020 - 04/2025					
<b>Data Col Period</b>	11/2020 - 10/2024					
<b>Security Plan</b>	Yes					
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> <b>PreProduction Start:</b> 04/01/2020  <b>Pretest End:</b>  <b>Staffing Completed:</b> 10/01/2020  <b>SS Train Start:</b> 11/18/2020  <b>DC Start:</b> 11/09/2020 </td> <td style="width: 50%; vertical-align: top;"> <b>Pretest Start:</b>  <b>Recruitment Start:</b> 07/23/2020  <b>GIT Start:</b>  <b>SS Train End:</b> 11/24/2020  <b>DC End:</b> 11/03/2022 </td> </tr> </table>				<b>PreProduction Start:</b> 04/01/2020 <b>Pretest End:</b> <b>Staffing Completed:</b> 10/01/2020 <b>SS Train Start:</b> 11/18/2020 <b>DC Start:</b> 11/09/2020	<b>Pretest Start:</b> <b>Recruitment Start:</b> 07/23/2020 <b>GIT Start:</b> <b>SS Train End:</b> 11/24/2020 <b>DC End:</b> 11/03/2022
<b>PreProduction Start:</b> 04/01/2020 <b>Pretest End:</b> <b>Staffing Completed:</b> 10/01/2020 <b>SS Train Start:</b> 11/18/2020 <b>DC Start:</b> 11/09/2020	<b>Pretest Start:</b> <b>Recruitment Start:</b> 07/23/2020 <b>GIT Start:</b> <b>SS Train End:</b> 11/24/2020 <b>DC End:</b> 11/03/2022					
<b>Other Project Team Members:</b>	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					



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

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<b>Report Period</b>	July, 2022 (STARRS-LS Waves 3 & 4)	<b>Project Phase</b>	Implementing
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<b>Risk Level</b>	<i>Some Concerns</i>
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<b>Monthly Update</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> We have released 13 replicates (13,670 sample lines) and completed 10,341 interviews as of August 5. Despite Replicate 13's somewhat improved performance, we continued to investigate and mitigate reasons for lower observed response rates.</li> <li><input type="checkbox"/> We continued programming of both the Wave 4 survey and sample management system; we continued work on procedures for Wave 4 interview verification and quality control; we started planning for Wave 4 trainings of data collection staff.</li> <li><input type="checkbox"/> James attended the quarterly GSC Meeting on July 12.</li> <li><input type="checkbox"/> We continued bi-weekly meetings with M&amp;RA to coordinate Safety Plan and respondent locating activities.</li> <li><input type="checkbox"/> We participated in discussions with the research team about the budget for adding the biosample flags, administrative variables and inventory document to the ICPSR public holdings.</li> <li><input type="checkbox"/> We took steps to resolve an issue related to the Year 3 subaward, which was unexpectedly held up at U-M ORSP due to new security requirements included in the award language.</li> <li><input type="checkbox"/> IRB: An amendment for changes to the Wave 4 instrument was approved by the U-M and USUHS IRBs.</li> <li><input type="checkbox"/> Annual Security Controls Review: We awaited the memo from AAG acknowledging the annual Information Assurance (IA) review.</li> <li><input type="checkbox"/> Annual NDI data request: We awaited the Inter-Agency Agreement (IAA) to provide funding to be established by M&amp;RA.</li> <li><input type="checkbox"/> We provided support for analyst requests.</li> <li><input type="checkbox"/> Slides were created for the presentation on STARRS data at ICPSR to be given by James and our ICPSR project manager at a Fall VA Cyber Seminar.</li> </ul>
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**Special Issues**

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

- Year 3 Subaward: Since the subaward was issued in June, it has been unexpectedly held up at U-M ORSP 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)].

It is our understanding that this language does not apply to our agreement with HJF, but trying to sort this all out among the multiple parties involved has taken almost two months now, and it is still not resolved. The Year 2 award was extended through the end of June; starting July, we have been placing all charges on an SRO overhead account. If this is not sorted out within the next week or two, we will be at serious risk of having to stop work. 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.

- Despite Replicate 13's somewhat improved performance, we continued steps to investigate and mitigate reasons for lower observed response rates:

- o M&RA continued to help with looking up Army sample lines to identify individuals who have new Army email addresses.

- M&RA completed the lookups for the 194 Replicate 13 Army sample lines. 205 valid Army emails were found, 45 of which were new to U-M (not previously in our contact records). We added the new addresses to our sample management system to be used in subsequent email communication.

- o Interviewer staffing shortages: through mid-July, we continued to offer overtime and asked staff to pick up extra shifts whenever possible. Starting mid-July, our staff have been able to more comfortably cover the calling volume for smaller Replicate 13. We will continue to monitor the situation.

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

- 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 (see Table 4). 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 5 above). As decisions are made, we will work with the research team to schedule and implement this work.

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

**Cost**  
**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:**

After making updates to the projections, the overall overrun increased only slightly (\$96,502 compared to last month's \$96,021). Changes made were to move the projected hours from one SSA to another and to add a few hours for Daric Thorne for help with protocol testing and Peter Sparks for portal programming. Bill also moved unspent Rpay dollars forward.

**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:**

We spent less than projected in June (Actuals: \$215,063; Projected: \$254,003). The underspending was mainly in main data collection (IWER hours) and in sampling/reporting.

**Measures**

	Units Complete	RR	HPI
<b>Current Goal:</b>		83.8	8.9
<b>Goal at Completion:</b>		83	8
<b>Current actual:</b>		77.4	10.1
<b>Estimate at Complete:</b>		78	10
<b>Variance:</b>		5	-2

**Other Measures**

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

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

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

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

MSMS  
 Blaise 5  
 Desktop; Other (Webcam, USB headset)  
 N/A  
 N/A  
 Yes, R  
 SRO Group; Other (CloudResearch (TurkPrime))  
 Cash, prepaid (\$2); Other (ABS=\$2 giftcode -> prepaid; \$20/\$22 giftcode -> post)  
 Imprest Cash Fund from ISR Business Office; Other (TurkPrime (now CloudResearch))

**Report Period**

July, 2022 (VCT)

**Project Phase**

Closing

**Risk Level**

On Track

**Monthly Update**

The team revised the first methods paper and submitted to Methods, Data, Analyses (MDA) (A online, open-access journal published by GESIS) in February. MDA reviewed the paper and have asked for some edits. The team is working on the revisions to the paper. We hope to submit the revision in early August.

We (Andrew, Kallan, and Fred) are preparing for an AAPOR webinar we are giving in October on video interviewing.

The interview effects paper came out as an advance article at JSSAM in December 2021. The survey data sets will be made publicly available via openICPSR.

We (Andrew, Fred, and Kallan) will turn to the recruitment and participation paper after the AAPOR webinar in October. Kallan is documenting the R code for eventual release as part of the documentation at ICPSR. She provided some information on the models used for the revisions to the MDA paper.

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

Andrew will schedule a final project review in the coming months.

**Special Issues****Cost**

<b>Total Cost to Date (Direct + Indirect):</b>	376,960.01
<b>Estimated Cost at Completion (E\$AC):</b>	376,960.01
<b>Total Budget:</b>	377,455.00
<b>Variance (Budget minus E\$AC):</b>	494.99

**Reason For Variance:**

VM costs are on target. The current cost projections for the MiCDA Analysis account are below.

The cost information for the MiCDA analysis funds are:

Total Budget: \$30,089.00  
Total Cost to Date: \$29,994.33  
Estimated cost at completion: \$29,994.33  
Variance: \$94.67

The cost information for the MiCDA supplement funds are:

Total Budget: \$54,207  
Total Cost to Date: \$54,118.00  
Estimated cost at completion: \$54,118.00  
Variance: \$89.00

**Projections**

**Dollars Projected For Month:** 0.00  
**Actual Dollars Used:** 2,321.65  
**Variance (Projected minus Actual):** -2,321.65  
**Reason For Variance:** There was a timesheet error in April that was corrected and processed in May.

**Measures**

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

**Other Measures**

# ***Survey Research Operations***

## ***Monthly Project Report***

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

***July 2022***



## Developmental Initiatives





























*TSME23-DCO Tech System Support*

*TSME23-PIPPA 2.0 FY23*

*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
TSME SRO SYS MAINTENANCE-GENERAL (483910)	Initiatives	Implementing	Jeffrey L Smith							
TSME23 DCO Tech System Support FY2023	Initiatives	Implementing	Vivienne Y Outlaw							
TSME23-PIPPA	Initiatives	Implementing	Mark Simonson							
TSME23-SelfSchedUI (483424)	Initiatives	Planning	Andrew L Hupp							

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

**Principal Investigator/Client**

**Funding Agency**

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

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

*Budget Analyst:* Carl S Remmert

*Production Manager:*

*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** July, 2022 (TSME23 DCO Tech System **Project Phase** Implementing

**Risk Level** On Track

**Monthly Update** Fred - changed the staffing emails.  
Fred - added Effective Date of display\_name (as downloaded from UM)  
Fred/DCSR/Recruitment Websites (all DCO modules) - changed email server to use Email server at ITS.  
Fred - Added GIT to Staff List report.  
Fred - rolled out new Status (Vacation) and added Footprint notification  
Fred/Inventory system - added extra flexible mapping on SRO\_Id.  
Max continued to work on the php programming for Iwer Website on WordPress.  
Max worked with Chris to resolve the authentication module for WordPress.

**Special Issues**

<b>Cost</b>	<i>Total Cost to Date (Direct + Indirect):</i>	0.00
	<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>	

<b>Projections</b>	<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**

<b>Project Name</b>	(TSME23-PIPPA) PIPPA 2.0 (425198) FY23												
<b>Project Mode</b>	Primary: Not Available												
<b>Project Type</b>	Developmental Initiatives	<b>Project Status</b>	Current										
<b>Budget</b>	<b>Direct Budget:</b> 10,000.00	<b>Indirect Budget:</b> 0.00	<b>Total Budget:</b> 10,000.00										
<b>Principal Investigator/Client</b>													
<b>Funding Agency</b>													
<b>IRB</b>	<b>HUM#:</b>	<b>Period Of Approval:</b>											
<b>Project Team</b>	<b>Project Lead:</b>	Mark Simonson											
	<b>Budget Analyst:</b>												
	<b>Production Manager:</b>												
	<b>Senior Project Advisor:</b>												
	<b>Production Manager:</b>												
	<b>Production Manager:</b>												
<b>Proposal #:</b>	no data												
<b>Description:</b>	PIPPA application on the ODS Server												
<b>SRO Project Period</b>	01/1996 - 01/1996												
<b>Data Col Period</b>													
<b>Security Plan</b>	NA												
<b>Milestone Dates</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"><b>PreProduction Start:</b></td> <td style="padding: 5px;"><b>Pretest Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>Pretest End:</b></td> <td style="padding: 5px;"><b>Recruitment Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>Staffing Completed:</b></td> <td style="padding: 5px;"><b>GIT Start:</b></td> </tr> <tr> <td style="padding: 5px;"><b>SS Train Start:</b></td> <td style="padding: 5px;"><b>SS Train End:</b></td> </tr> <tr> <td style="padding: 5px;"><b>DC Start:</b></td> <td style="padding: 5px;"><b>DC End:</b></td> </tr> </table>			<b>PreProduction Start:</b>	<b>Pretest Start:</b>	<b>Pretest End:</b>	<b>Recruitment Start:</b>	<b>Staffing Completed:</b>	<b>GIT Start:</b>	<b>SS Train Start:</b>	<b>SS Train End:</b>	<b>DC Start:</b>	<b>DC End:</b>
<b>PreProduction Start:</b>	<b>Pretest Start:</b>												
<b>Pretest End:</b>	<b>Recruitment Start:</b>												
<b>Staffing Completed:</b>	<b>GIT Start:</b>												
<b>SS Train Start:</b>	<b>SS Train End:</b>												
<b>DC Start:</b>	<b>DC End:</b>												
<b>Other Project Team Members:</b>	Sarah Broumand, Cheng Zhou, Andrew Piskorowski												
<b>Other Project Names:</b>													
<b>Sample Mgmt Sys</b>	NA												
<b>Data Col Tool</b>	NA												
<b>Hardware</b>	NA												
<b>DE Software</b>	NA												
<b>QC Recording Tool</b>	NA												
<b>Incentive</b>	NA												
<b>Administration</b>	NA												
<b>Payment Type</b>	NA												
<b>Payment Method</b>	NA												

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<b>Report Period</b>	July, 2022 (TSME23-PIPPA)	<b>Project Phase</b>	Implementing
<b>Risk Level</b>	On Track		
<b>Monthly Update</b>	Phase 2 specifications defined here: <a href="https://docs.google.com/document/d/1PkjZTHXeVH4y5nBE9NriLKzxqVRBdKmhSt9-l9wzPoE">https://docs.google.com/document/d/1PkjZTHXeVH4y5nBE9NriLKzxqVRBdKmhSt9-l9wzPoE</a>		
	Grant will sign off on specifications before implementation.		
<b>Special Issues</b>			

**Cost**

<i>Total Cost to Date (Direct + Indirect):</i>	0.00
<i>Estimated Cost at Completion (E\$AC):</i>	0.00
<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>	

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-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**

**PreProduction Start:**

**Pretest End:**

**Staffing Completed:**

**SS Train Start:**

**DC Start:**

**Pretest Start:**

**Recruitment Start:**

**GIT Start:**

**SS Train End:**

**DC End:**

**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**

July, 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 will meet 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.

**Special Issues**

**Cost**

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

**Projections**

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