Survey Research Operations

Monthly Project Report

Sponsored

June 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
(CDS-21) PSID Child Development Supplement 2021
(ECHO (Year 6)) Environmental Influences on Child Health Outcomes
(EDC Midline) Every Dollar Counts Program Evaluation Midline Surveys
(EDC-SS Phases 3-4) Every Dollar Counts Semi-Structured, Phases 3-4
(HCAP 2022) Harmonized Cognitive Assessment Protocol, 2022
(HRS 2021 OYMS / COVID Survey) HRS 2021 Off-Year Mail Study / COVID Survey
(HRS 2022 Panel) Health and Retirement Study 2022
(HRS2022-Screening) HRS 2022 - Screening
(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
(PSID21) Panel Study of Income Dynamics 2021
(PSID23 Online Contact Update) Panel Study of Income Dynamics 2023 Online Contact Update
(PSID-PR) Puerto Rico Panel Study of Income Dynamics
(SCA 2022) Surveys of Consumer Attitudes
(SCIP 2021) Sustainability Culture Indicators Project
(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
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	🟢	🟢	🟢	🟡	🟢	🟢
CDS-21	Sponsored	Closing	Sarah Crane	🟢	🟢	🟢	🟢	🟢	🟢
ECHO (Year 6)	Sponsored	Implementing	Terri Ann Ridenour	🟢	🟢	🟡	🟡	🟡	🟡
EDC Midline	Sponsored	Implementing	Barbara Lohr Ward	🟢	🟢	🟡	🟢	🟢	🟢
EDC-SS Phases 3-4	Sponsored	Implementing	Karin Schneider	🟢	🟢	🟢	🟢	🟢	🟢
HCAP 2022	Sponsored	Planning	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	🟢	🟢	🟢	☐	🟢	🟢
PSID21	Sponsored	Closing	Shonda R Kruger-Ndiaye	🟢	🟢	🟢	🟢	🟢	🟢
PSID23 Online Contact Update	Sponsored	Implementing	Camila Kendall	☐	☐	☐	🟢	🟢	🟡
PSID-PR	Sponsored	Initiation	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	01/2019 - 03/2022
Data Col Period	05/2020 - 04/2022
Security Plan	NA
Milestone Dates	

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

Other Project Team Members:	SRO Team: Andrew Hupp, Laura Yoder, Rose Zdybel, Kallan Larsen, Lloyd F Hemingway, Jim Rodgers, Colette Keyser, Deb Wilson, Wen Chang
Other Project Names:	During the budget proposal stage this project was known as 'A More Efficient Web-Based Approach to Collecting National Family, Fertility and Reproductive Health Data'.
Sample Mgmt Sys	MSMS
Data Col Tool	Blaise 5
Hardware	Desktop
DE Software	Other (Blaise 5 (for Mail questionnaires)); External vendor (TBD)
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post (Modules 1 - $20, Module 2 - $20 and Module 3 - $30); Cash, prepaid (Screener IW - $2 Potentially
Payment Method	Check through STrak RPay System; Check through other system (Info. from MSMS and transfer information via

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Report Period	June, 2022 (AFHS)	**Project Phase**	Closing
Risk Level	*On Track*		

Monthly Update	June update Low level of work during June... • Raphael is currently working on calculating the weights for Replicate 2. • The PI group will rerun analysis to incorporate Replicate 2 data (including, comparing key indicators from NSFG with AFHS) Current SRO focus: Two additional components, AFHS Panel Feasibility Survey and AFHS non-response follow-up. These will be reported on separately in MPR from next month (June).
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 **Jul 14, 2022**		
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
Jul 14, 2022

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.

Measures

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

Other Measures

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

Description:

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):

Step 1: finalize the design of the national web-based survey, using as much National Survey of Family Growth (NSFG) content as possible.

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.

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.

Step 4: conduct statistical analyses comparing estimates within key socio-demographic subgroups of the population – gender, race, and age groups.

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.

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.

Step 7: further methodological research involving AFHS participants and non-respondents to inform the design of a larger-scale AFHS (research proposal).

**********AFHS Panel Feasibility Survey*******************

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.

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%).

Non-response contact protocol:

7 days after the initial invitation is mailed, participants will be contacted again by email (if available).

14 days - we will send a further reminder by email or text message.

21 days - email sent.

28 days - paper copy of the survey along with a $5 cash token to remaining non-responding participants.

42 days - depending on the response rate we will telephone the participant to invite them to complete the follow-up survey.

Participants will be mailed a $10 check after completing the survey.

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	06/2022 - 09/2022
Data Col Period	06/2022 - 08/2022
Security Plan	NA

Milestone Dates

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

Other Project Team Members:	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
Other Project Names:	'A More Efficient Web-Based Approach to Collecting National Family, Fertility and Reproductive Health Data'.
Sample Mgmt Sys	MSMS; Project specific system (For non-response follow-up we will just use Excel.)
Data Col Tool	Blaise 5
Hardware	Paper and Pencil
DE Software	External vendor (Data Force)
QC Recording Tool	N/A
Incentive	Yes, R; Yes, Other (for non-response follow-up we will use a non-monetary incentive.)
Administration	SRO Group
Payment Type	Check, post ($10); Other (Non-monetary incentive)
Payment Method	Check through other system (RPay (MSMS))

Report Period	June, 2022 (AFHS-Additional work) **Project Phase** Implementing
Risk Level	*On Track*

Monthly Update

June updates
-Panel Feasibility Survey
The initial invite was mailed on 21 June and an email invite was sent the next day. The first weekly USPS delivery report for the invite letter suggests that 96% of the letters were delivered by Monday 27 June.
The first reminder email was sent on Tuesday (28 June) and the next email/text reminder followed a week later. As of this morning, 500 Rep 2 participants have completed the panel feasibility survey (RR 36%),
-NonR follow-up
Finalising staffing, mailing materials and training the two available interviewers.

Special Issues

Cost
Jul 14, 2022

Total Cost to Date (Direct + Indirect):	16,716.55
Estimated Cost at Completion (E$AC):	49,332.23
Total Budget:	50,265.00
Variance (Budget minus E$AC):	11,910.28
Reason For Variance:	AFHS Feasibility Pilot Estimate – Expanded SRO # 22-0037R01 (Estimated costs at $47,000 - $53,000 direct costs. This estimate assumes that funding would be provided from UM internal sequestering funds and includes no indirect costs)

Projections
Jul 14, 2022

Dollars Projected For Month:	19,542.08
Actual Dollars Used:	4,439.37
Variance (Projected minus Actual):	15,102.71
Reason For Variance:	DataForce did not invoice the final amount (est. ~14,000) in June. The remaining amount will be split between two invoices (July and August).

Measures

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

Other Measures

Project Name	(BFY) Baby's First Years
Project Mode	Primary: Face to Face Total of Modes: 1
Project Type	Sponsored Projects

Project Status	Current

Budget	***Direct Budget:*** 4,826,754.00	***InDirect Budget:*** 1,892,058.00	***Total Budget:*** 6,718,812.00

Principal Investigator/Client	Dr. Greg Duncan (University of California - Irvine) Dr. Kimberly Noble (Teachers College Columbia University) Dr. Katherine Magnuson (University of Wisconsin)
Funding Agency	National Institute of Child Health and Human Development (NICHD)
IRB	***HUM#:*** HUM00137963 ***Period Of Approval:***
Project Team	***Project Lead:*** Piotr Dworak ***Budget Analyst:*** Janelle P Cramer ***Production Manager:*** Veronica Connors-Burge ***Senior Project Advisor:*** Stephanie A Chardoul ***Production Manager:*** Margaret Lavanger ***Production Manager:*** Michelle Smith
Proposal #:	no data

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

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

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

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

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

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

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

Milestone Dates

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

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

Other Project Names: HHICD Household Income and Childhood Development

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

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

Risk Level *On Track*

Monthly Update Project updates:

BFY Age 3 data collection has ended on June 30 with 921 completes exceeding the goal of 907 (and the proposal goal of n=860).

Work on BFY is moving into a new stage - interviewers are 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 has been going pretty smoothly and SRC iwers have been complemented on leaving detailed contact notes which help the lab teams make the initial contact with the respondent.

Data collection results by week 52:

	Goal	Actual
OV	907	921
NE	262	264
NY	265	273
MN	111	109
LA	269	275

Staffing: Beginning July, we are transitioning into a new phase and are consolidating staff (including TLs). There has also been one attrition in NOLA.

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: 2 (plan to retain only 1 long term)

Technical system:
All tech updates for Age3+10-month check in have been completed and the 10-month hand-off protocol has been finalized by the Data Ops. Age3+10-month data delivery is proceeding with no issues.

Finances:
We are now projecting underrun. 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
Jul 22, 2022

Total Cost to Date (Direct + Indirect):	5,668,990.47
Estimated Cost at Completion (E$AC):	6,651,061.97
Total Budget:	6,718,812.00
Variance (Budget minus E$AC):	67,750.03
Reason For Variance:	Lower travel costs, some R payments projected for June were issued earlier in May, lower iwer time and management / tech hours.

Projections
Jul 22, 2022

Dollars Projected For Month:	109,851.22
Actual Dollars Used:	96,427.12
Variance (Projected minus Actual):	13,424.10
Reason For Variance:	Lower travel costs, some R payments projected for June were issued earlier in May, lower iwer time and management / tech hours.

Measures

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

Other Measures

Project Name	(CARE Military) Concussion Assessment, Research and Education (CARE) Consortium 2022 - Military
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 1,031,747.00 **InDirect Budget:** 268,254.00 **Total Budget:** 1,300,001.00
Principal Investigator/Client	Dr. Steven Broglio (U of M Kinesiology) Dr. Micheal McCrea (Medical College of Wisconsin) Dr. Thomas McAllister (Indiana University School of Medicine)
Funding Agency	
IRB	**HUM#:** 00202691 **Period Of Approval:** 7/23/2021 - open
Project Team	**Project Lead:** Donnalee Ann Grey-Farquharson **Budget Analyst:** Carl S Remmert **Production Manager:** Stacy Quisenberry **Senior Project Advisor:** Barbara Lohr Ward **Production Manager:** Hongyu Johnson **Production Manager:** Keith Liebetreu
Proposal #:	no data

Description: 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.

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.

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.

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).

SRO Project Period	02/2022 - 03/2023
Data Col Period	03/2022 - 02/2023
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:	Donnalee Grey-Farquharson, Stacy Quisenberry, Hongyu Johnson, Keith Leibetreu, James Koopman, Minako Edgar, David Ackuaku, Carl Remmert
Other Project Names:	CARE-CSI Military
Sample Mgmt Sys	Other (non-SRO)
Data Col Tool	Other (non-SRO)
Hardware	Laptop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, R
Administration	NA
Payment Type	Check, post ($150)
Payment Method	Other (Kinesiology)

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

Risk Level   *On Track*

Monthly Update

System
There was a townhall meeting between the PIs, Sample Management System vendor (QuesGen, QG) and the SRO management team to discuss the technical issues described here:
Production for CARE is progressing slowly. There is a major setback with a registration process for respondents that the systems vendor put in place. Respondents are required to register by inputting what is sometimes outdated forgotten data and afterwards, they then login. In addition to the double barrier in place the many system bugs encountered in this process is an additional cause for concern. There are other system issues but currently this one has the potential for the most harm to the project. The PIs have been made aware, even before implementation, that methodologically this is a was/is not a good idea.
-Contiune to work with QG (Sample Management System vendor) to add new/enhanced features to the Sample Management System to support the production.

Production and Hiring
The start of data collection was delayed until April 2022 due to the delayed completion of the Sample Management System by the 3rd vendor (QuesGen,QG). Interviewers have been focusing on calling/contacting/locating the respondents. Interviewers have encountered difficulties on finding eligible respondents due to their current military deployment situations. Interviewers are also still acting as the tech support for respondents. Training for 16 (2 dropped) new CARE interviewers, all on-staffers, will be on July 19 - 22, and July 25 - 26.

Production Status: as of 06/30/2022
Total Released Sample number - 5970 cases
Total Comp Iws - 441 (Web - 434, CATI - 7)
Total Response Rate - 7.4% (Web RR - 7.3%, CATI RR-0.1%)

DMSS
-Data is now being delivered to SRO daily but we are finding many errors. SRO is working to resolve with the vendors. SRO also received data dictionary but not sure how current it is so we are following. The SRO dashboard is up and running.
-Continue to work with QG (Sample Management System vendor) to add new/enhanced features to the Sample Management System to support the production.

Special Issues

Cost
Jun 30, 2022

Total Cost to Date (Direct + Indirect):	230,680.46
Estimated Cost at Completion (E$AC):	1,294,025.04
Total Budget:	1,300,001.00
Variance (Budget minus E$AC):	5,975.96
Reason For Variance:	Updated Budget was recently uploaded into CRS. The projections will be adjusted in July.

Projections
Jun 30, 2022

Dollars Projected For Month:	27,209.91
Actual Dollars Used:	60,261.99
Variance (Projected minus Actual):	-33,052.08
Reason For Variance:	Budget was recently uploaded into CRS. The additional funds will be added to the current amount and be reflected in July 2022. The projections will be entered and refined accordingly.

Measures

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

Other Measures

Project Name	(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022
Project Mode	Primary: Telephone Secondary: Web Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 3,718,978.00 **InDirect Budget:** 966,936.00 **Total Budget:** 4,685,914.00
Principal Investigator/Client	Dr. Steven Broglio (U of M Kinesiology) Dr. Michael McCrea (Medical College of Wisconsin) Dr. Thomas McAllister (Indiana University School of Medicine)
Funding Agency	

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

Project Team

Project Lead:	Donnalee Ann Grey-Farquharson
Budget Analyst:	Carl S Remmert
Production Manager:	Stacy Quisenberry
Senior Project Advisor:	Barbara Lohr Ward
Production Manager:	Hongyu Johnson
Production Manager:	Keith Liebetreu

Proposal #:   no data

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

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

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

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

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

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

Other Project Team Members: Donnalee Grey-Farquharson, Stacy Quisenberry, Hongyu Johnson, Keith Leibetreu, James Koopman, Minako Edgar, David Ackuaku, Carl Remmert

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

- -

Report Period	June, 2022 (CARE SALTOS MTEC)	**Project Phase**	Implementing

Risk Level   *On Track*

Monthly Update

System
-There was a townhall meeting between the PIs, Sample Management System vendor (QuesGen, QG) and the SRO management team to discuss the technical issues described here:
Production for CARE is progressing slowly. There is a major setback with a registration process for respondents that the systems vendor put in place. Respondents are required to register by inputting what is sometimes outdated forgotten data and afterwards, they then login. In addition to the double barrier in place the many system bugs encountered in this process is an additional cause for concern. There are other system issues but currently this one has the potential for the most harm to the project. The PIs have been made aware, even before implementation, that methodologically this is a was/is not a good idea.
-Continue to work with QG (Sample Management System vendor) to add new/enhanced features to the Sample Management System to support the production.

Production and Hiring
Interviewers are still acting as the tech support for respondents. Training for 16 (2 dropped) new CARE interviewers, all on-staffers, will be on July 19 - 22, and July 25 - 26.

Production Status: as of 06/30/2022
Total Released Sample number - 4632 cases
Total Comp Iws - 1401 (Web - 1386, CATI - 15)
Total Response Rate - 30.4% (Web RR - 30.01%, CATI RR-0.3%)

DMSS
-Data is now being delivered to SRO daily but we are finding many errors. SRO is working to resolve with the vendors. SRO also received data dictionary but not sure how current it is, we are checking on that. The SRO dashboard is up and running.
-Continue to work with QG (Sample Management System vendor) and Datalys (Data Management Vendor) on improving the accuracy of the data export reports and the QC reports.

Special Issues

Cost
Jun 30, 2022

Total Cost to Date (Direct + Indirect):	309,081.66
Estimated Cost at Completion (E$AC):	4,655,478.81
Total Budget:	4,685,914.00
Variance (Budget minus E$AC):	30,435.19
Reason For Variance:	Updated Budget was recently uploaded into CRS. The underrun value is closely reflecting the current projection. The projection will be revisit in July 2022.

Projections
Jun 30, 2022

Dollars Projected For Month:	94,282.33
Actual Dollars Used:	110,192.00
Variance (Projected minus Actual):	-15,909.67
Reason For Variance:	Budget was recently uploaded into CRS. The overrun will be adjusted in July 2022.

Measures

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

Other Measures

Project Name	(CDS-21) PSID Child Development Supplement 2021			
Project Mode	Primary: Telephone	Total of Modes: 1		
Project Type	Sponsored Projects		**Project Status**	Current
Budget	**Direct Budget:** 1,466,821.00	**InDirect Budget:** 821,419.00	**Total Budget:**	2,288,240.00

Principal Investigator/Client
Narayan Sastry
Paula Fomby

Funding Agency

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

Project Team

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

Proposal #:   no data

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

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

Milestone Dates

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

Other Project Team Members:
Rachel Orlowski   Project Consultant
Peggy Lavanger   Production Management QC Support
Kallan Larsen   Training Coordinator
Kasyera Kowalczyk Project Management Support

Other Project Names:

Sample Mgmt Sys   SurveyTrak
Data Col Tool   Blaise 4.8
Hardware   Laptop; [UM cell] Phone
DE Software   NA
QC Recording Tool   DRI-CARI
Incentive   Yes, R
   Administration   NA
   Payment Type   Other (electronic payment)
   Payment Method   Check through STrak RPay System

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Report Period	June, 2022 (CDS-21)	**Project Phase**	Closing

Risk Level   *On Track*

Monthly Update   Main data collection concluded on 6/18/22 for the Child and PCG instruments.
For approximately 1 week post-collection, a small team of field leaders completed telephone follow-up on non-final IVR cases.
The project team reviewed and finalized 8 cases that were deemed eligible for partial Iw (1005).

With the leadership of the Production Management team, a group of field leaders and interviewers reviewed, summarized. and coded out remaining non-final lines.
Final data files were delivered on 7/8/22, and the IVR system was deactivated on 7/15/22.
Occ/Ind coding of data from the Child Iw is underway, with an expectation to be completed by the end of August.

Special Issues

Cost
Jul 14, 2022

Total Cost to Date (Direct + Indirect):	1,902,495.23
Estimated Cost at Completion (E$AC):	2,078,362.55
Total Budget:	2,288,240.00
Variance (Budget minus E$AC):	209,877.45
Reason For Variance:	Cumulative underruns for final few months of data collection, including consolidation of some Iwers to build efficiency in working remaining sample.

Projections
Jul 14, 2022

Dollars Projected For Month:	177,135.94
Actual Dollars Used:	144,822.37
Variance (Projected minus Actual):	32,313.57
Reason For Variance:	In June, we projected to spend $114K direct cost, but actually spent $93K, for a monthly direct cost underrun of $21K. This underrun was mainly due to research and survey specialists salary underruns, and smaller non-salary underruns in categories including duplicating and telephone.

Measures

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

Other Measures

Component	goal units completed	final actual
Coverscreen	1886	1690
PCG Blaise interview	1697	1579
Child Blaise interview	966	751
IVR	710	637

Component	RR	
Coverscreen	90%	80%
PCG Blaise interview	90%	93%
Child Blaise interview	85%	84%*
IVR	90%	85%

*RR of Child Iw where PCG provided consent

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

Principal Investigator/Client
Nigel Paneth (Michigan State University)
Michael Elliott (University of Michigan)
Jean Kerver (Michigan State University)

Funding Agency NIH

IRB   **HUM#:**   HUM00139050   **Period Of Approval:**   10/2/2021-8/13/2022

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

Proposal #:   no data

Description:

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

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

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

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

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

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

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

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

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

Other Project Names:

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

Report Period	June, 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, 1,578 women have been recruited in clinics across the state of Michigan. As of today, 1,021 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 100 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: 906
Prenatal Survey 2: 663

[Phase 2: 3-Month Data Collection Summary]
    Babies born: 888
    3-month sample released: 873
    3-month interviews completed: 619
    Average attempts / Iw: 7.8
    Iw length: 46 min.
    Response Rate: 73%
    3-month biospecimen collected: 356

[Phase 3: Age 4 REDCap Survey]

    Age-4 sample released: 43
    REDCap surveys completed: 23
    Response Rate: 54%

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

    Age-4 sample released: 22
    In-person visits completed: 4
    In-person visits scheduled: 2

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

We unexpectedly lost a staff member who managed, administered and oversaw all of the ECHO Age 4 REDCap surveys, carried out manual follow up tasks and logged all contact efforts. She also managed all of the Age 4 in-person visit support. I am working closely with a staff member to expedite his and my own training and certification on the REDCap protocol and interface, which is time-intensive (and time sensitive). We've shifted project team assignments to accommodate the transition and support priorities. We continue to maintain three distinct (Phase 1-3) technical systems and all study protocols.

Last week 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.

Cost
Jul 14, 2022

Total Cost to Date (Direct + Indirect):	359,551.27
Estimated Cost at Completion (E$AC):	447,761.06
Total Budget:	427,336.00
Variance (Budget minus E$AC):	-20,425.06
Reason For Variance:	We believe the overall Year 6 ECHO budget is sufficient to support SRO's overall scope of work (Phase 1: Recruitment + Prenatal Interviews; Phase 2: 3-month Interview; and Phase 3: Age 4 protocols).

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

Projections
Jul 14, 2022

Dollars Projected For Month:	36,800.38
Actual Dollars Used:	30,884.90
Variance (Projected minus Actual):	5,915.48
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
Current Goal:	See Monthly Updates		
Goal at Completion:			
Current actual:			
Estimate at Complete:			
Variance:			

Other Measures

Project Name	(EDC Midline) Every Dollar Counts Program Evaluation Midline Surveys
Project Mode	Primary: Telephone Secondary: Face to Face Total of Modes: 2

Project Type	Sponsored Projects	**Project Status**	Current

Budget	*Direct Budget:*	1,513,016.00	*InDirect Budget:*	611,135.00	*Total Budget:*	2,124,151.00

Principal Investigator/Client
Elizabeth Rhodes (OpenResearch Lab)
Stephanie Chardoul (Survey Research Operations)
Sarah Miller (Universityof Michigan)

Funding Agency

IRB   *HUM#:*   HUM00145626/CR   *Period Of Approval:*   1/25/2021-1/18/2022

Project Team
Project Lead:	Barbara Lohr Ward
Budget Analyst:	Megan Gomez-Mesquita
Production Manager:	Barbara Aghababian-Homburg
Senior Project Advisor:	Nicole G Kirgis
Production Manager:	Donnalee Ann Grey-Farquharson
Production Manager:	Melissa Luker

Proposal #:   no data

Description:

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

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

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

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

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

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

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

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

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

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

Milestone Dates

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

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

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

Monthly Update	During June 2022, SRC activities on the EDC Midline project included the following: Task 1: Management, Budget and Work Plan • Participated in weekly project meetings with ORL to discuss scope, cost projections and schedule • Reviewed monthly project expenses. Updated labor and non-labor projections. • Reviewed interview recordings to check for proper administration • Conducted instrument testing for the Spanish release • Updated documentation on systems changes, sample releases • Monitored respondent payments. Documented payment issues and transmitted to research team.

Task 2: Sampling
• No activity this month

Task 3: Questionnaire Development
• Reviewed/corrected Spanish translations, provided updates to the project management team.
• Finalized the Spanish specification for programmers incorporating changes from the Spanish training

Task 4: CAI Programming
• Continued programming/testing of Spanish questionnaire.
• Prepared preliminary versions of HTML output from the questionnaire

Task 5: Systems Programming
• Sample Management Systems
o Finalized and released production releases 11 and 12
o Prepared specifications for end game changes (eliminating Kept-Appt token, increasing research payments, and escalating some cases to in-person)
o Programmed, tested and released the first round of end game changes; made updates to the sample and preload for the self-scheduler
o Made adjustments/modifications to Webtrak (SRO's production management system) to provide ability to sort/filter based on end-game changes
o Provided Help Desk support to field and SSL interviewers - triaged and fixed field data collection issues as necessary.

• Self-Scheduler
o Loaded production data for releases 11 and 12.
o Adjusted time slots in self-scheduler as needed.
o Designed and programmed new administrative reports for self-scheduler (focused on end-game)

• Daily Deliverables
o Prepared and delivered daily production data from SurveyTrak, Self-scheduler, and Blaise

Tasks 6, 7: Interviewer Recruitment & Hiring, Training
• Conducted virtual training for the Spanish version of the questionnaire.

Task 8: Main Data Collection
• Monitored and responded to incoming email, assisted SSL team with entry of appointments from self-scheduler.
• Reviewed recordings from completed interviews.
• Conducted data collection –
o 2,702 Completed telephone interviews through 6/30/2022
o 6 other finalized cases
• Quality Control
o Conducted quality assurance reviews of completed interviews.
o Conducted verification of completed interviews.

Task 9: Post Collection Processing
• No activity this month

Task 10: Weighting
• No activity this month

Task 11: Final Data Deliverables
• Reviewed and finalized list of data and other deliverables

Areas Requiring Attention:

Current Updates:
- We are projecting a substantial underrun for the project
- ☐ The project hired and trained a lower number of interviewers than anticipated, and the trainings were shorter than had been budgeted. This will result in lower than anticipated hosting and training travel costs.
- ☐ Hours per interview are exceptionally low due to heavy use of the self-scheduler.
- Hours per interview (HPI) are lower than budgeted due to exceptionally heavy use of the self-scheduler.
- o The planned recruitment and June training for Survey Services Lab interviewers was cancelled. The low HPI and continued heavy use of the self-scheduler by respondents will allow the study to finish without the need to recruit additional SSL interviewers
- Special COVID-19 mitigation procedures in the Survey Services Lab were cancelled in April. SSL interviewers turned in cell phones and laptops. Only SSL team leaders retain laptops and cell phones, with one additional cell phone held at the SSL front desk. This will result in lower costs for these items. Projections were updated accordingly.

Past/Ongoing:
- Interviewer recruitment – a number of newly-recruited and on-staff interviewers unexpectedly withdrew from the project during the week of March 7. In discussion with ORL, the following mitigation strategies will be undertaken:
- o Some interviewers are willing to work more hours, which will help to mitigate the loss of interviewers.
- o SRO conducted an on-staff interviewer recruitment for field interviewers, and conducted a virtual training for those interviewers. The date of the training was April 28-30, May 2.
- Schedule –
- o ORL and SRO agreed to delay the launch of interviewer training by two weeks. General interviewing techniques training was held March 26 – 27, and study specific training was held March 28-31. Interviewers began working April 2, and the first interviews were taken on April 4.
- o The Spanish version of the questionnaire was launched in early June.
- Programming
- o Programming hours for the main survey instrument ran higher than anticipated due to unexpected complications in the household roster and roster follow-up questions
- o Programming hours for the sample management system are ran higher than anticipated due to issues with the revised household roster, coordination with the self-scheduler and the addition of the QR codes and messages.
- Funding – The funding allocated from NIH funding to SRO was less than the budgeted amount. ORL has indicated in a brief email message that it will make up the difference in direct costs up to the budgeted (and approved amount), a deficit in indirect costs shows on the financial statement because of the difference in indirect costs between ORL and NIH. The indirect cost difference can be ignored, and will be reconciled at the end of the study. The project will be managed to the direct cost total.
- o A substantial direct cost underrun due to lower than anticipated hours per interview has eliminated any deficit and negated the need for supplemental funding.
- Interviewer training – Study specific interviewer training was budgeted for five days. The study will not require five full days of in-person training. This has contributed to a direct cost underrun for the project.

Approved Work Scope Changes

As of January 27, 2022, $36,351 direct cost in work scope changes were approved.
- October 28, 2021 $15,663 in estimated direct costs (approximately 180 programmer hours) was approved for programming related to customization of the Self Scheduler
- November 16, 2021 $5,640 in estimated direct costs (58 programmer hours plus 20 tester hours) was approved for programming over and above the budgeted level of changes
- January 14, 2022 $2,698 in estimated direct costs (25 programmer hours) for updates to the self-scheduler work flow for the confirmation page
- January 24, 2022 $12,350 in estimated direct costs to supply the Survey Services Lab interviewers, team leaders and production manager with cell phones that will allow them to work from the Lab or remotely. This projected expense is added as a COVID-risk mitigation measure. NOTE: COVID-19 measures ended in April. Interviewers kept laptops and phones for one month of the production period. SSL Team Leaders will continue to keep laptops and phones, and one phone will remain in the SSL.
- Jan 24, 2022 – Interviewer training was delayed by two weeks.
- The project will conduct one attrition training. The training will be virtual to on-board experienced field interviewers.
- April 14, 2022 - approval of revision to Self Scheduler to allow different tracks for SSL versus Field scheduling $5,623 direct, $7,895 total cost.

Special Issues

Cost
Jul 14, 2022

Total Cost to Date (Direct + Indirect):	1,085,681.49
Estimated Cost at Completion (E$AC):	1,660,867.84
Total Budget:	2,124,151.00
Variance (Budget minus E$AC):	463,283.16
Reason For Variance:	The projected underrun is due to lower than anticipated training costs plus a very how HPI due to heavy use of the innovative self-scheduler. Hours per interview are coming in at about 1/2 of budgeted due to heavy use of the self-scheduler.

Projections
Jul 14, 2022

Dollars Projected For Month:	268,034.72
Actual Dollars Used:	244,773.32
Variance (Projected minus Actual):	23,261.40
Reason For Variance:	We had anticipated that more FTF work would be needed, and we had also anticipated that HPI would begin to increase. However respondents have continued to use the self-scheduler at very high rates, leading to far lower interviewer travel and HPI than had been anticipated.

Measures

	Units Complete	RR	HPI
Current Goal:	2670	89%	5.5
Goal at Completion:			
Current actual:	2702	90%	2.87
Estimate at Complete:			
Variance:			

Other Measures

Project Name	(EDC-SS Phases 3-4) Every Dollar Counts Semi-Structured, Phases 3-4

Project Mode   Primary: Telephone   Secondary: Face to Face   Total of Modes: 2

Project Type   Sponsored Projects   **Project Status**   Current

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

Principal Investigator/Client   Jessica Wiederspan (OpenResearchLab)
Elizabeth Rhodes (OpenResearchLab)

Funding Agency   OpenResearchLab

IRB   *HUM#:*   HUM00164105   *Period Of Approval:*   1/1/2022-12/31/2022

Project Team

Project Lead:	Karin Schneider
Budget Analyst:	Megan Gomez-Mesquita
Production Manager:	Barbara Aghababian-Homburg
Senior Project Advisor:	Nicole G Kirgis
Production Manager:	
Production Manager:	

Proposal #:   no data

Description: Semi-Structured (Qualitative) interviews of a panel of respondents to the larger EDC Baseline/Midline studies. The same respondents are asked to do six qualitative interviews over the course of the three-year EDC program (1-1.5 hour iws). Phases 3 and 4 are separated by eight months. Phase 3 conducted by phone from November 2021 - January 2022. Phase 4 is planned as in-person starting in August 2022 and running through the end of the calendar year. SRO sample is 129 cases. 122 were successfully interviewed for Phase 3 (two cases are presently being confirmed by the ORL (PI) team as incarcerated or deceased).
Kirsten Alcser was SPA for Phase 3.

SRO Project Period   10/2021 - 01/2023
Data Col Period   11/2021 - 12/2022
Security Plan   NA
Milestone Dates

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

Other Project Team Members: Ashwin Dey, Becky Loomis, Andrea Pearce, Marsha Skoman, Peter Sparks, Stephanie Windisch

Other Project Names: "Phase 3/4" is often referred to as "Round 3/4"

Sample Mgmt Sys   SurveyTrak
Data Col Tool   Blaise 4.8
Hardware   Laptop; [UM cell] Phone
DE Software   N/A
QC Recording Tool   DRI-CXM
Incentive   Yes, R
    Administration   SRO Group
    Payment Type   NA
    Payment Method   Check through other system (API through STrak to PI's payment system)

Report Period   June, 2022 (EDC-SS Phases 3-4)   **Project Phase**   Implementing

Risk Level   *On Track*

Monthly Update   We are in underrun due to PIs deciding Phase 4 interviews will be all phone, with no in-person administration. Also, re-posted to on-staff interviewers that no travel was required and rec'd great response, so no hiring needed, no GIT, will staff with experienced SRO interviewers. Training to start 8/23/22. Production interviewing to start right after Labor Day.

Special Issues   None

Cost
Jul 22, 2022

Total Cost to Date (Direct + Indirect):	144,615.00
Estimated Cost at Completion (E$AC):	334,388.00
Total Budget:	408,935.00
Variance (Budget minus E$AC):	74,546.00
Reason For Variance:	See below - Phase 4 will be phone-only, no in-person, so all travel expense is now backed out of budget projections.

Projections
Jul 22, 2022

Dollars Projected For Month:	14,960.00
Actual Dollars Used:	14,960.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	In June, activity was mainly limited to screening and conducting mock interviews with on-staffers.

Measures

	Units Complete	RR	HPI
Current Goal:	130		
Goal at Completion:			
Current actual:			
Estimate at Complete:			
Variance:			

Other Measures

Project Name	(HCAP 2022) Harmonized Cognitive Assessment Protocol, 2022
Project Mode	Primary: Face to Face Secondary: Telephone
Project Type	Sponsored Projects

			Project Status	Current

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

Principal Investigator/Client	Kenneth Langa (SRC) David Weir (SRC)
Funding Agency	
IRB	**HUM#:** HUM00099822 **Period Of Approval:**
Project Team	**Project Lead:** Maureen Joan O'Brien **Budget Analyst:** Richard Warren Krause **Production Manager:** Margaret Lavanger **Senior Project Advisor:** Evanthia Leissou **Production Manager:** **Production Manager:**
Proposal #:	no data
Description:	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. 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.
SRO Project Period	01/2022 - 12/2023
Data Col Period	07/2022 - 09/2023
Security Plan	NA
Milestone Dates	

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

Other Project Team Members:	PDMG: Tony Romanowski, Lisa VanHavermaet, Megan Hromco. TSG: Jeff Smith, Brad Goodwin, Vallyn Dall, Peter Sparks, Ashwin Dey, Deb Wilson
Other Project Names:	
Sample Mgmt Sys	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop; [UM cell] Phone
DE Software	Blaise 4.8 BIA
QC Recording Tool	NA
Incentive	Yes, R; Yes, INF
Administration	NA
Payment Type	Check, prepaid (50); Check, post (25)
Payment Method	Check through STrak RPay System

Report Period	June, 2022 (HCAP 2022)	**Project Phase**	Planning
Risk Level	On Track		
Monthly Update	HCAP training was July 13-15 and was held at the Kensington in Ann Arbor. 16 interviewers attended. We posted for 22, and 19 were hire. 3 who had been hired were unable to attend due to health issues but will attend in the		

October training. The training went well, all Iwers passed the Consent, Informant iw, and Respondent iw certifications. There were SSA staffing issues (1 resigned, 1 unable to attend due to health issues, 1 had an injury 2 days prior to training) but PDMG and DCO staff from other projects helped with the training and was much appreciated. In addition, 4 visitors from international sister studies attended the training. There were no systems surprises during the training. The Day 2 agenda was adjusted due to concerns there would not be enough respondent iw practice. Currently, the team is prod testing for a 7/20 production launch. A second HCAP Iwer 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 are posting for 12 NHs. We will be sharing some Iwers with HRS and with CARE. Other items currently being worked on include, a dashboard to report HCAP production metrics, getting the Spanish iw and materials ready and launched, andsetting up the Brave Man/Logical memory data entry form in a Blaise Stand-alone. We are finalizing WEBTRAK, Weblog, and the FPR and should have those ready by the end of this week. The QC plan has being developed and verification items have been identified. 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
Jul 22, 2022

Total Cost to Date (Direct + Indirect):	446,246.07
Estimated Cost at Completion (E$AC):	4,320,274.88
Total Budget:	4,488,000.00
Variance (Budget minus E$AC):	167,725.12
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
Jul 22, 2022

Dollars Projected For Month:	118,059.83
Actual Dollars Used:	183,221.43
Variance (Projected minus Actual):	-65,161.60
Reason For Variance:	Respondent TOA costs were projected for next mo and were charged this mo, duplicating costs were much higher than projected due to increase in costs due to supply chain issues.

Measures

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

Other Measures

Project Name	(HRS 2021 OYMS / COVID Survey) HRS 2021 Off-Year Mail Study / COVID Survey
Project Mode	Primary: Mail Total of Modes: 1
Project Type	Sponsored Projects

Project Status   Current

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

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

Funding Agency   National Institutes of Health (NIH)
IRB   *HUM#:*   HUM00196577   *Period Of Approval:*   4/26/2021-4/25/2022
Project Team
Project Lead: Ian Ogden
Budget Analyst: Grace Tison
Production Manager: Kelley Lynn Popielarz
Senior Project Advisor: Evanthia Leissou
Production Manager: Ian Ogden
Production Manager:

Proposal #:   no data

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

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

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

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

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

SRO Project Period   03/2021 - 06/2022
Data Col Period   05/2021 - 05/2022
Security Plan   NA
Milestone Dates

PreProduction Start:	03/01/2021	*Pretest Start:*	
Pretest End:		*Recruitment Start:*	
Staffing Completed:		*GIT Start:*	
SS Train Start:	06/08/2021	*SS Train End:*	06/08/2021
DC Start:	05/28/2021	*DC End:*	06/30/2022

Other Project Team Members:	Technical Leads: Ian Ogden & Jim Rodgers
	MSMS Developers: Pam Swanson & Jim Rodgers
	Data Manager: Laura Yoder
	Project Support 1: Jeannie Baker (Replacing Becky Scherr, as of late-June, 2021)
	Project Support 2: Melissa Luker (Spring Only)
	Project Support 3: Debra Heier (Locating, Spring Only)
	Project Support 4 (RPay & Mailing-Support Only, Spring): Anna Fuqua-Smith
	Project Support 5 (RPay & Mailing-Support Only, Fall): Daniah Buageila
	Production Manager: Pooja Varma-Laughlin (Spring Only)
	Production Manager / Scheduler: Kelley Popielarz (Fall Only)
Other Project Names:	HRS 2021 Off-Year Mail Study
	HRS 2021 OYMS (COVID) / OYMSF
Sample Mgmt Sys	SRSv21TraC OMSWailer
Data Col Tool	NA HRS 2021 Spring COVID Survey / Fall COVID Survey
Hardware	Pape2and Pespettives on the Pandemic Survey
DE Software	Other (MSMS DCA)
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, prepaid (25.00)
Payment Method	Check through STrak RPay System

Report Period	June, 2022 (HRS 2021 OYMS / COVID **Project Phase** Closing
Risk Level	*On Track*
Monthly Update	[Budget]

$107,700 in check voids hit in the month of June, 2022. These were the unredeemed prepayment checks for the Spring, 2021 sample release which were printed in May, 2021.

[Production & Project Closeout Status]
Data collection ended as scheduled on Wednesday, 6/22/2022 and various closeout tasks have been completed or are underway:
(1) Sending of final batch of questionnaires to DataForce for processing - Done
(2) Performing final reconciliation to ensure receipt of survey data for all questionnaires sent - Done
(3) Sending of final batches of data to SRC-HRS - Done
(4) Initiation of process to send any non-blank questionnaires received on/after 6/23/2022 directly to SRC-HRS without processing/logging - Done
(5) Finalizing open sample in MSMS - pending
(6) Prep and delivery of final production report (inc. counts and rates) - pending

[Project Closeout Schedule]
Some costs to the project may not ultimately hit until October or November, 2022 - namely, final check voids for the Fall 2021 sample release. In this case, the project may persist for a few extra months after all other project activity has concluded.

Special Issues	None.
Cost **Jul 20, 2022**	

Total Cost to Date (Direct + Indirect):	1,204,657.49
Estimated Cost at Completion (E$AC):	1,162,029.78
Total Budget:	1,333,924.00
Variance (Budget minus E$AC):	171,894.22
Reason For Variance:	The EAC is currently lower than the total cost to date due to projected credits for unredeemed respondent payments / checks in the future (those for the Fall, 2021 release being voided in October, 2022).
	We are currently projecting an underrun of ~$172K. 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
Jul 20, 2022

Dollars Projected For Month:	-144,112.85
Actual Dollars Used:	-145,007.87
Variance (Projected minus Actual):	895.02
Reason For Variance:	Lower than projected salary costs and associated recharges.

Measures

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

Other Measures

Units Completed & RR by Release (as of 6/14/2022):
```
       n, IW |  RR
Spring | 8,363 | 60.7%
Fall   | 3,211 | 55.8%
```

Project Name	(HRS 2022 Panel) Health and Retirement Study 2022
Project Mode	Primary: Mixed Total of Modes: 3
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 12,138,521.00 **InDirect Budget:** 4,369,869.00 **Total Budget:** 16,508,390.00
Principal Investigator/Client	David Weir (ISR-SRC)

Funding Agency

IRB   **HUM#:**   HUM000611128   **Period Of Approval:**   9/8/2021 to 9/7/2022

Project Team
Project Lead:	Evanthia Leissou
Budget Analyst:	Richard Warren Krause
Production Manager:	Andrea Sims
Senior Project Advisor:	Nicole G Kirgis
Production Manager:	Deborah Zivan
Production Manager:	Jennifer C Arrieta

Proposal #:   no data

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

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

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

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

Other Project Names:
Sample Mgmt Sys   SurveyTrak; MSMS
Data Col Tool   Blaise 5
Hardware   Laptop; [UM cell] Phone; Paper and Pencil
DE Software   Other (Blaise 5 Coding Application); External vendor (DataForce Scanning SAQs)
QC Recording Tool   Camtasia
Incentive   Yes, R; Yes, INF
    Administration   NA
    Payment Type   Check, prepaid (80.00); Check, post ($50 (WBD), $20 (SAQ))
    Payment Method   Check through STrak RPay System; Check through other system (Rpay system set up for MSMS); Interviewer p

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Report Period	June, 2022 (HRS 2022 Panel) **Project Phase** Implementing
Risk Level	*Some Concerns*

Monthly Update

Projected hours and completed interviews were consistently higher than goals throughout the month of June. 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 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. Data model migration issue was fixed for the SurveyTrak environment and datamodel 4 was released to the field. The technical team continues to work with CBS on Blaise issues impacting web panel. The team is preparing for August and September trainings. Interviewer recruitment for the September training is in process.

Special Issues

-Projected overrun
-Blaise 5.10 issues impacting web panel

Cost
Jul 14, 2022

Total Cost to Date (Direct + Indirect):	7,416,572.34
Estimated Cost at Completion (E$AC):	16,825,622.80
Total Budget:	16,508,390.00
Variance (Budget minus E$AC):	-317,232.80
Reason For Variance:	CRS is projecting the contingent fringe benefits with the newly approved 10.4% rate to accommodate ACA costs, the $400 signing bonus for field staff, Field interviewer and SurveyTech base rate increase, an extra day added to February production training, the increase in per mile reimbursement for travel. CRS is now using the actual Iwer rates for projecting Iwer costs and travel projections were removed from the recruitment task. The Casic recharge rate and Field Ops rate increases are projected. Still need to increase mileage costs for the remaining interviews.

Projections
Jul 14, 2022

Dollars Projected For Month:	1,184,456.88
Actual Dollars Used:	1,223,278.91
Variance (Projected minus Actual):	-38,822.03
Reason For Variance:	CASIC recharge rates and Field Ops recharge rates account for this month's overrun.

Measures

	Units Complete	RR	HPI
Current Goal:	6104	26.3%	9.5
Goal at Completion:	16266	74.0%	9.0
Current actual:	6346	27.5%	9.3
Estimate at Complete:	16266	74.0%	9.0
Variance:	0	0	0

Other Measures

Project Name	(HRS2022-Screening) HRS 2022 - Screening

Project Mode   Primary: Face to Face   Secondary: Telephone   Total of Modes: 2

Project Type   Sponsored Projects   **Project Status**   Current

Budget   ***Direct Budget:***   17,851,365.00   ***InDirect Budget:***   6,426,491.00   ***Total Budget:***   24,277,856.00

Principal Investigator/Client
David Weir (SRC)
Helen Levy (SRC)
Ken Langa (SRC)

Funding Agency

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

Project Team
Project Lead:	Evanthia Leissou
Budget Analyst:	Richard Warren Krause
Production Manager:	
Senior Project Advisor:	Nicole G Kirgis
Production Manager:	Andrew L Hupp
Production Manager:	

Proposal #:   no data

Description: The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample.

SRO Project Period   02/2021 - 01/2024
Data Col Period   03/2022 - 01/2024
Security Plan   NA

Milestone Dates

PreProduction Start:		***Pretest Start:***	
Pretest End:		***Recruitment Start:***	
Staffing Completed:		***GIT Start:***	
SS Train Start:		***SS Train End:***	
DC Start:	04/19/2022	***DC End:***	

Other Project Team Members:

Other Project Names:

Sample Mgmt Sys   SurveyTrak; Other ((Blaise) Case Management App (CMA))
Data Col Tool   Blaise 5
Hardware   Laptop; [UM cell] Phone; Paper and Pencil
DE Software   N/A
QC Recording Tool   Camtasia; N/A
Incentive   Yes, R; Yes, INF
    Administration   SRO Group
    Payment Type   Check, post; Cash, post
    Payment Method   Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest C

Report Period   June, 2022 (HRS2022-Screening)   **Project Phase**   Implementing

Risk Level   *On Track*

Monthly Update   Andrew and Eva met with the PIs and the Sampling team to discuss the Pre-Id EGENX and Pre-Id MOC sample. The design of the pre-Id MOC cases was agreed upon. The sampling team will begin there work and select the pre-Id sample in June. Once selected Eva and Andrew will meet with the sampling team and the production managers to determine which cases should be part of the second release (planned in June).

A screener refresher training was held. Concepts from the February training were reinforced, some concepts

expanded on (e.g., locked buildings), and new concepts introduced (e.g., Type I and Type II updates). The expanded and new concepts will be added to the main training materials moving forward. A second training (mainly of on-staffers) is planned for late summer. A third training of (mainly of new hires) is planned for later Sept/early October.

Web production launched on Tuesday, April 19. A proposal was put forth by SRO (and accepted by the PIs) to release the field sample earlier than planned (by 2 weeks). This was done to 1) get screening started in the field, 2) to take advantage of the extra daylight, and 3) get data needed to determine staffing needs for the fall training. The non-responding web cases from the first release (n= 2,136) were moved to SurveyTrak for follow-up by the field. The 50% of cases assigned to in-person first work were released. The screening work in the field is off to a slow start.

IRB: Nothing new in May. Additional materials for screening will be submitted in June and July.

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

Special Issues

Cost
Jul 13, 2022

Total Cost to Date (Direct + Indirect):	3,705,659.22
Estimated Cost at Completion (E$AC):	24,617,950.44
Total Budget:	24,277,856.00
Variance (Budget minus E$AC):	-340,094.16
Reason For Variance:	Updating projections to be more in line with actuals from the field.

Projections
Jul 13, 2022

Dollars Projected For Month:	1,221,763.28
Actual Dollars Used:	634,827.47
Variance (Projected minus Actual):	586,935.81
Reason For Variance:	--Staff hours in June were lower than projections by ~70% (~$258,000), and non-salary costs were lower than expected (recruitment by ~$17,000, hosting by ~$56,000, travel by ~$44,000). Due to all of this there was less (~$163,000) in indirect costs.

Measures

	Units Complete	RR	HPI
Current Goal:	5,000/2,500	73%	3.0
Goal at Completion:			
Current actual:	296/247	15.4%	3.09
Estimate at Complete:			
Variance:			

Other Measures

Project Name	(IHDS3) India Human Development Survey Wave 3
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 358,900.61 **InDirect Budget:** 200,983.92 **Total Budget:** 559,884.53

Principal Investigator/Client
Sonalde Desai (University of Maryland)
Stephanie Chardoul (University of Michigan)
Santanu Pramanik (National Council of Applied Economic Research)

Funding Agency   National Institutes of Health, Department of Health and Human Services

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

Project Team
Project Lead:	Gina-Qian Yang Cheung
Budget Analyst:	Ryan Neice
Production Manager:	
Senior Project Advisor:	Stephanie A Chardoul
Production Manager:	Sarah Elisa Broumand
Production Manager:	Jennifer M Kelley

Proposal #:   no data

Description: The India Human Development Survey (IHDS) is a nationally representative, multi-topic, longitudinal survey of 41,554 households in 1503 villages and 971 urban neighborhoods across India. The first round of interviews were completed in 2004-5; data are publicly available through ICPSR. A second round of IHDS reinterviewed most of these households in 2011-12 (N=42,152). SRC joins IHDS Wave 3 to automate data collection, the scope of work includes methodological design, sample design, questionnaire design, technical instrument design, supervisor/interviewer training, production monitoring, quality control, data dissemination, and 2-3 weekly conference calls for capacity building.

SRO Project Period   01/2019 - 03/2024
Data Col Period   05/2022 - 10/2023
Security Plan   NA
Milestone Dates

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

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

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

HelpDesk Team
Emmanuel Ellis
John

Data Manager Team
Sarah E
Jennie

Other Project Names:

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

- -

Report Period	June, 2022 (IHDS3)	**Project Phase**	Initiation

Risk Level   *On Track*

Monthly Update   Agency 02 is in production and added 03 agency for training. Also, work on the migrant project, which is planning to launch at the end of July

Special Issues   update the projections to the May 2023

Cost
Jul 14, 2022

Total Cost to Date (Direct + Indirect):	407,524.89
Estimated Cost at Completion (E$AC):	558,500.12
Total Budget:	559,884.53
Variance (Budget minus E$AC):	1,384.41
Reason For Variance:	I have updated the projections.

Projections
Jul 14, 2022

Dollars Projected For Month:	25,826.21
Actual Dollars Used:	26,362.44
Variance (Projected minus Actual):	-536.23
Reason For Variance:	Migrant project is in test and added new agency 02

Measures

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

Other Measures   NA

Project Name	(MI CReSS (Year 2)) Michigan COVID-19 Recovery Surveillance Cohort Study
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 341,017.00 **InDirect Budget:** 88,663.00 **Total Budget:** 429,680.00
Principal Investigator/Client	
Funding Agency	
IRB	**HUM#:** HUM00181068 **Period Of Approval:** Exempt
Project Team	**Project Lead:** Terri Ann Ridenour
	Budget Analyst: William Lokers
	Production Manager: Ruth B Philippou
	Senior Project Advisor: Nicole G Kirgis
	Production Manager:
	Production Manager:
Proposal #:	no data

Description:

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

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

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

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

Milestone Dates

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

Other Project Team Members:

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

Other Project Names:	
Sample Mgmt Sys	Web SMS
Data Col Tool	Blaise 5
Hardware	Laptop; Desktop
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post ($25)
Payment Method	NA

- -

Report Period	June, 2022 (MI CReSS (Year 2))	**Project Phase**	Implementing

Risk Level _On Track_

Monthly Update

We lost another interviewer we recently onboarded and the production assistant / locator. A new posting is being prepared and we aim to recruit another 4 interviewers to fill the various gaps on the project. A second bilingual Spanish interviewer is being certified this week, to provide reinforcement.

Sample replicate 6 was released last week and we are settling into a routine, monthly release of sample replicates to production.

Special Issues

Cost
Jul 14, 2022

Total Cost to Date (Direct + Indirect):	341,421.75
Estimated Cost at Completion (E$AC):	458,187.06
Total Budget:	429,680.00
Variance (Budget minus E$AC):	-28,507.06
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
Jul 14, 2022

Dollars Projected For Month:	38,076.66
Actual Dollars Used:	38,241.76
Variance (Projected minus Actual):	-165.10
Reason For Variance:	

Measures

	Units Complete	RR	HPI
Current Goal:	1,652 (Rel 1-6)	80% (60%-Web/40%Tel)	2.25
Goal at Completion:		80% (60%-Web/40%Tel)	
Current actual:	1,323	66% (65%-Web/36% Tel	3.88
Estimate at Complete:			
Variance:			

Other Measures

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

2689	Y2 Sample
2152	80% RR Rate

1292	60% Web
860	40% Phone

2.25	HPI Telephone
0.25	HPI Web Reminder

Project Name	(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027

Project Mode Primary: Class SAQ   Total of Modes: 1

Project Type Sponsored Projects   **Project Status** Current

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

Principal Investigator/Client Richard Miech (SRC)

Funding Agency National Institute on Drug Abuse, one of the National Institutes of Health.
IRB *HUM#:* 00217920   *Period Of Approval:* pending
Project Team *Project Lead:* Rebecca Gatward
Budget Analyst: Dean E Stevens
Production Manager: Margaret Lavanger
Senior Project Advisor: Gregg Peterson
Production Manager: James Koopman
Production Manager:

Proposal #: no data

Description: Since 1975 the MTF survey has measured drug and alcohol use and related attitudes among adolescent students nationwide. A nationally representative sample of survey participants report their drug use behaviors across three time periods: lifetime, past year, and past month. The survey is funded by the NIDA, a component of the National Institutes of Health (NIH), and conducted by the University of Michigan.
It is based on two interconnected series of surveys using nationally representative samples:
(a) self-administered annual in-school surveys of 8th, 10th, and 12th graders (~45,000) in 400 schools. Proctors (SRO interviewers) coordinate and administer the data collection in schools (either FTF or remotely without visiting the schools).
(b) panels of high school graduates aged 19-30, 35, 40,45, 50, 55, and 60 (now primarily surveyed by web). Panel members aged 19-30 are invited to participate every other year/asked to complete a web survey and the older sample members are sent questionnaires (mail and web) at five-year interval. The MTF panel study has three parts - early in the year a newsletter is mailed to panel members. If the newsletter is returned (undelivered) locating effort targets these panel members and others who have not participated for X years. The web panel launches (web) in spring and in around June a telephone non-response effort begins for those invited to participate. The panel members are recruited from the 12th graders who participate in the base year study.
Press releases and published results can be found here.. http://www.monitoringthefuture.org/

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

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

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

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

Report Period	June, 2022 (MTF Base Year 2022_27)	**Project Phase** Implementing
Risk Level	*On Track*	

Monthly Update
June 2022
All school survey administrations were completed by 9 June.
Surveys were completed at 314 schools - 124 remote (interviewer did not visit the school to proctor the survey) and 190 FTF.
Student response rate - 80%. Hours per survey administration = 16.6
- held a virtual debrief with the new to MTF interviewers and sent a debrief form for all remaining interviewers to complete.

Special Issues

Cost
Jul 14, 2022

Total Cost to Date (Direct + Indirect):	316,331.31
Estimated Cost at Completion (E$AC):	9,054,045.27
Total Budget:	9,778,060.00
Variance (Budget minus E$AC):	724,014.73
Reason For Variance:	The underspend is based on a first version of projections for the new five year funding period. We will work on refining these based on outcomes from this year (the first with remote and FTF survey administrations). The PG funding amount etc. was not received unto end April and then hours transferred from a temporary short code to the new code.

Projections
Jul 14, 2022

Dollars Projected For Month:	258,476.78
Actual Dollars Used:	129,502.25
Variance (Projected minus Actual):	128,974.53
Reason For Variance:	Some freight charges need to be transferred back to MTF (they are currently being charged to one SRO account) - and some travel costs need to be transferred across from the old shortcode.

Measures

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

Other Measures

Project Name	(MTF HID 22) MTF High Intensity Drinking 2022
Project Mode	Primary: Web Total of Modes: 1
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 301,160.00 **InDirect Budget:** 167,822.00 **Total Budget:** 468,982.00
Principal Investigator/Client	Megan Patrick (University of Michigan)
Funding Agency	
IRB	**HUM#:** 00159183 **Period Of Approval:** 2/2/2022
Project Team	**Project Lead:** Donnalee Ann Grey-Farquharson
	Budget Analyst: Parina Kamdar
	Production Manager: Hongyu Johnson
	Senior Project Advisor: Kirsten Haakan Alcser
	Production Manager:
	Production Manager:
Proposal #:	no data
Description:	2022 will be Wave 4 Data Collection.

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

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

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

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

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

- Started the SRO project team structure.
- Set up short codes and CRS system
- Coordinated with the Study Team staff on Round2 testing plan
- worked on data delivery
- Final data delivery is complete

Technical system:
- The system has been stable since we resolved the mobile application issues
- continue to monitor during the data collection
- worked on post-data collection tasks

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
Jun 30, 2022

Total Cost to Date (Direct + Indirect):	325,182.92
Estimated Cost at Completion (E$AC):	338,404.14
Total Budget:	468,982.00
Variance (Budget minus E$AC):	130,577.86
Reason For Variance:	This is the 4th year of the continuous study. The data collection ended in April 2022. The underrun amount is a carry over over the past 3 years. The amount will be adjusted in July,2022.

Projections
Jun 30, 2022

Dollars Projected For Month:	7,413.45
Actual Dollars Used:	2,900.01
Variance (Projected minus Actual):	4,513.44
Reason For Variance:	The data collection ended in April 2022. The project staff mainly worked on post-data collection activities. The underrun amount will be adjusted in July 2022.

Measures

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

Other Measures

Project Name	(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027

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

Project Type   Sponsored Projects   **Project Status**   Current

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

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

Funding Agency

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

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

Proposal #:   no data

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

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

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

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

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

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

Report Period   June, 2022 (MTF Panel 2022-27)   **Project Phase**   Implementing

Risk Level   *On Track*

Monthly Update   Management
- Worked with MTF research team on testing the survey instrument
- updated the project timeline
- continue to monitor the data collection

System
- prepared SMS for testing and production
- prepared RLM for production
- continue to report system issues and worked with the research team staff
- continue to work on issues/refinement items in RLM

Data Collection
- Production started in April 2022
Total Sample: 17720. As of 06/30/2022:
Total completes=6682, RR=37.73%

Special Issues

Cost
Jun 30, 2022

Total Cost to Date (Direct + Indirect):	190,098.86
Estimated Cost at Completion (E$AC):	3,896,957.98
Total Budget:	3,895,217.00
Variance (Budget minus E$AC):	-1,740.98
Reason For Variance:	We are in the transition from hardship account to the official account. The total project amount includes MTF Web Illume as well as Non-Response Calling and Winter Location project. We will make the adjustment in July 2022.

Projections
Jun 30, 2022

Dollars Projected For Month:	81,756.19
Actual Dollars Used:	103,684.65
Variance (Projected minus Actual):	-21,928.46
Reason For Variance:	We are in the transition from hardship account to the official account. The total project amount includes MTF Web Illume as well as Non-Response Calling and Winter Location project. The overrun amount is MTF Panel 2022-2027 that was the combination of MTF Panel 2017-2022 and MTF Web Illume. We will make the adjustment in July 2022.

Measures

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

Other Measures

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

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

Project Type Sponsored Projects   **Project Status** Current

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

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

Funding Agency NIH

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

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

Proposal #: no data

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

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

SRO Project Period 06/2021 - 07/2022
Data Col Period 09/2021 - 06/2022
Security Plan NA
Milestone Dates

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

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

Risk Level *On Track*

Monthly Update TAS 2021 data collection ended 6/30. Web survey remained closed through 7/5 and that "extension" yielded 3 late completes (2314 + 3). Final coding is in progress and some of the numbers below may change. Interviewers have now assigned the final result codes and entered the final call notes.

Final results:

Completes: 2317 + approved partials: 51 = 2368
Non-Sample: 21
Estimated RR: 2317 + 50 / 2710 - 21 = 88.0%. Proposal response rate = 88.0%.

Final data delivery is scheduled for 7/29 and on target.

Final report for this wave will be ready in early August.

Finances: We plan to deliver August, and September cost reports. The September cost report to be the final for the project - no more charges beyond August.

Special Issues

Cost
Jul 22, 2022

Total Cost to Date (Direct + Indirect):	1,169,925.62
Estimated Cost at Completion (E$AC):	1,381,833.43
Total Budget:	1,299,454.85
Variance (Budget minus E$AC):	-81,159.92
Reason For Variance:	In June overrun remains steady and is a result of adding cost for in-person visits and increasing the iwer payrates.

Projections
Jul 22, 2022

Dollars Projected For Month:	124,802.24
Actual Dollars Used:	124,263.45
Variance (Projected minus Actual):	538.79
Reason For Variance:	Small variance due to management / iwer time.

Measures

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

Other Measures

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

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

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

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

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

Proposal #: no data

Description:

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

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

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

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

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

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

Other Project Team Members:

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

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

Risk Level On Track

Monthly Update June work was limited to cost monitoring and final systems close out activities in TSG. There are no projections in July or beyond and we hope the July cost report will be our final project report.

Special Issues

Cost
Jul 22, 2022

Total Cost to Date (Direct + Indirect):	7,295,737.87
Estimated Cost at Completion (E$AC):	7,295,737.87
Total Budget:	6,887,423.00
Variance (Budget minus E$AC):	-408,314.87
Reason For Variance:	The variance remains nearly identical to that projected in May. The drivers have been categorized in previous reports and will be reported again upon project close (the July MPR).

Projections
Jul 22, 2022

Dollars Projected For Month:	2,599.86
Actual Dollars Used:	2,202.01
Variance (Projected minus Actual):	397.85
Reason For Variance:	Time and cost required for the project's technical close out came in slightly lower than projected.

Measures

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

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

Project Name	(PSID23 Online Contact Update) Panel Study of Income Dynamics 2023 Online Contact Update
Project Mode	Primary: Web Total of Modes: 1
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 47,456.00 **InDirect Budget:** 0.00 **Total Budget:** 47,456.00
Principal Investigator/Client	Katherine McGonagle (PSID)
Funding Agency	NSF, NIA, NICHD, The Office of the Assistant Secretary for Planning and Evaluation of the United States, DHHS, The Econom
IRB	**HUM#:** HUM00062417 **Period Of Approval:** 3/22/22-3/21/23
Project Team	**Project Lead:** Camila Kendall
	Budget Analyst: Megan Gomez-Mesquita
	Production Manager:
	Senior Project Advisor: Stephanie A Chardoul
	Production Manager:
	Production Manager:
Proposal #:	no data
Description:	SRO will write technical specifications, program and test a Blaise 5 web instrument and web portal with authentication that will allow PSID and TAS respondents to confirm or update their contact information via an online survey. SRO will provide PSID will authenticated QR codes that will be embedded in a mailing sent to respondents. SRO will also send the respondents one email reminder with an authenticated link. This project is under the PSID Core IRB.
SRO Project Period	04/2022 - 12/2022
Data Col Period	06/2022 - 12/2022
Security Plan	NA
Milestone Dates	

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

Other Project Team Members:	Rachel Orlowski -- PSID Core Lead
	Karl Dinkelmann -- TSG Lead and Blaise Programming Support
	Marsha Skoman -- Blaise Programmer
	Daric Thorne -- MSMS Spec Lead
	Kyle Goodman -- MSMS Set up Programmer
	Jim Rodgers -- MSMS Lead
	Rose Zybel -- Data Manager
Other Project Names:	
Sample Mgmt Sys	MSMS
Data Col Tool	Blaise 5
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, R
Administration	ISR Group (PSID)
Payment Type	Check, post ($10); Other (electronic, post--JP Morgan)
Payment Method	Check through other system (PSID staff will handle check & e-payment via RAPS)

Report Period	June, 2022 (PSID23 Online Contact Up **Project Phase** Implementing
Risk Level	*Some Concerns*
Monthly Update	PSID experienced complications while pulling address preload. Address preload delivery was delayed by one month (delivered July 14 instead of June 16). Decision was made that PSID would deliver address preload in batches. Batch 1 will contain PSID Core completes in Batch 1.

SRO and PSID finalized Blaise specs. SRO began Blaise programming and testing. SRO began the process to move the project to a new server. Created a new URL for the project, so that server move could happen without impacting TAS which was still in production.

IRB amendment submitted and approved on 6/22.

Special Issues   Late preload delivery contributed to delayed project launch. Blaise programming, especially for the portal, is progressing slower than expected.

Cost
Jul 21, 2022

Total Cost to Date (Direct + Indirect):	21,896.59
Estimated Cost at Completion (E$AC):	48,310.01
Total Budget:	47,456.00
Variance (Budget minus E$AC):	-854.06
Reason For Variance:	Increased projections in July and August due to delayed project launch.

Projections
Jul 21, 2022

Dollars Projected For Month:	11,484.98
Actual Dollars Used:	9,798.69
Variance (Projected minus Actual):	1,686.29
Reason For Variance:	Underrun was mainly due to programmers charging less hours than projected.

Measures

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

Other Measures

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

		Project Status	Current
Budget	**Direct Budget:** 828,581.00	**InDirect Budget:** 464,004.00	**Total Budget:** 1,292,585.00

Principal Investigator/Client	Narayan Sastry (University of Michigan) Elizabeth Fussel (Brown University)
Funding Agency	NICHD, with supplemental funding being sought from NIA
IRB	**HUM#:** HUM00197300 **Period Of Approval:** 4/5/2022-4/4/2023
Project Team	**Project Lead:** Shonda R Kruger-Ndiaye
	Budget Analyst: Megan Gomez-Mesquita
	Production Manager:
	Senior Project Advisor: Stephanie A Chardoul
	Production Manager: Camila Kendall
	Production Manager:
Proposal #:	no data
Description:	SRO will work with the PIs and a local survey firm in Puerto Rico, Estudios Técnicos (ETI), to develop a sample frame, sample design, questionnaire and data collection protocols for both pilot data collection (in 2022) and baseline data collection (in 2023). DMSS will provide assistance with sample design and implementation, responsive design, panel maintenance issues, and creation of sample weights. SRO will update the PSID-21 Spanish instrument for use specifically in PR. SRO will assist with the preparation of training materials for Listing training, Pretest and Main Data collection and will travel to PR to be on-site for these trainings. SRO will define reports for production and quality control monitoring that will be programmed through the SurveyTrak system, and train the research team on using these reports. All data will be collected by ETI's interviewers in PR and will be encrypted and transmitted daily via SurveyTrak to a secure SRC server. SRO will also assist with data processing.
SRO Project Period	01/2022 - 12/2023
Data Col Period	
Security Plan	NA

Milestone Dates

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

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

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Report Period	June, 2022 (PSID-PR)	**Project Phase**	Initiation
Risk Level	*On Track*		
Monthly Update	Signed an agreement with Luma Energy to obtain additional address data from electric meters. SRO and PIs worked with ETI to finalize the budgets. SRO sent PIs NIA budget and single paragraph description. PIs working to establish funding to ETI - hybrid PO for baseline wave in process. Russel Sage Foundation proposal was funded - funds can be used to cover some pretest costs.		

Held listing preload prep training with University of PR students on 6/8 and launched listing preload prep. Some concern about the progress of the listing preload prep, and whether students can complete the work by July 22nd. SRO and PIs finalized ELP Segment Observation Specs.

SRO tech team meetings began in June. DMSS finalized address structure template for ELP. Testing of GIS capture application is on-going. SRO began process to set up PR collaborators to help test GIS capture applications in PR.

SRO worked on translation estimates for training materials.

Special Issues

Preload listing prep is taking longer than expected. Resource constraints across the suite -- programmer assigned to the project has competing PSID suite responsibilities and deadlines. SRO decided to postpone the listing training until September.

Cost
Jul 22, 2022

Total Cost to Date (Direct + Indirect):	34,415.67
Estimated Cost at Completion (E$AC):	1,292,534.95
Total Budget:	1,292,585.00
Variance (Budget minus E$AC):	50.05
Reason For Variance:	Variance is miniscule after projections were adjusted to reflect planned scope and the CAI programmer was project by name. CAI programming had been staffed at the intermediate level but was staffed by a senior resource.

Projections
Jul 22, 2022

Dollars Projected For Month:	12,268.68
Actual Dollars Used:	9,351.75
Variance (Projected minus Actual):	2,916.93
Reason For Variance:	Variance mainly due to underruns in programmer and survey director salary charges

Measures

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

Other Measures

Project Name	(SCA 2022) Surveys of Consumer Attitudes				
Project Mode	Primary: Telephone	Total of Modes: 1			
Project Type	Sponsored Projects		**Project Status**	Current	
Budget	*Direct Budget:* 1,251,758.00	*InDirect Budget:* 0.00		*Total Budget:*	1,251,758.00

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

Funding Agency

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

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

Proposal #:   no data

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

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

SRO Project Period   12/2021 - 12/2022
Data Col Period   01/2022 - 12/2022
Security Plan   NA
Milestone Dates

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

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

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Report Period   June, 2022 (SCA 2022)   **Project Phase**   Initiation

Risk Level   *On Track*

Monthly Update
SCA JUN22 began as scheduled on WED May 25, and ended as scheduled on MON JUN 20. We completed 602 (321/181/100) IWs for the month (exceeding the monthly goals of 600:320/180/100 by 2 IWs) - at a cumulative HPI of 2.76 (0.24 below the budgeted goal of 3.0).

Special Issues

Cost
Jul 14, 2022

Total Cost to Date (Direct + Indirect):	564,178.85
Estimated Cost at Completion (E$AC):	1,219,582.73
Total Budget:	1,251,758.00
Variance (Budget minus E$AC):	32,175.27
Reason For Variance:	Reduced hpi

Projections
Jul 14, 2022

Dollars Projected For Month:	93,252.32
Actual Dollars Used:	85,952.51
Variance (Projected minus Actual):	7,299.81
Reason For Variance:	Reduced hpi

Measures

	Units Complete	RR	HPI
Current Goal:	600		3.0
Goal at Completion:	600		3.0
Current actual:	600		2.76
Estimate at Complete:	602		2.76
Variance:	2		-0.24

Other Measures

Project Name	(SCIP 2021) Sustainability Culture Indicators Project
Project Mode	Primary: Not Available
Project Type	Sponsored Projects

Project Status Current

Budget	**Direct Budget:** 126,000.00 **InDirect Budget:** 0.00 **Total Budget:** 126,000.00
Principal Investigator/Client	John Callewaert, PI (SRC, Graham Sustainability Institute) Robert Marans, Co-PI (SRC) Noah Webster, Co-PI (SRC)
Funding Agency	
IRB	**HUM#:** HUM00204955 **Period Of Approval:** 9/2021-9/2026
Project Team	**Project Lead:** Maureen Joan O'Brien **Budget Analyst:** Carl S Remmert **Production Manager:** **Senior Project Advisor:** Andrew L Hupp **Production Manager:** **Production Manager:**
Proposal #:	no data
Description:	The overall goal Sustainability Cultural Indicators Project (SCIP), a joint project of the Institute for Social Research (ISR) and the Graham Environmental Sustainability Institute (Graham), is to measure changes in sustainability and carbon-neutrality related knowledge, commitments, and practices in the University of Michigan (U-M) community over time. The principle component of SCIP is a large-scale annual survey, to be conducted with U-M students, faculty, and staff from all U-M Campuses: Ann Arbor, Flint, and Dearborn.
SRO Project Period	09/2021 - 09/2026
Data Col Period	10/2021 - 12/2021
Security Plan	NA

Milestone Dates

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

Other Project Team Members:	Maureen O'Brien - Project Lead, application programming, sample loading, questionnaire distribution Minako Edgar - Sample prep, data management, data delivery, GIS analysis Raphael Nishimura - Weighting Carl Remmert - budget support analyses
Other Project Names:	
Sample Mgmt Sys	Project specific system (Qualtrics)
Data Col Tool	Other (Qualtrics)
Hardware	NA
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, R
Administration	NA
Payment Type	Other (Amazon)
Payment Method	Other (via Email)

Report Period	June, 2022 (SCIP 2021) **Project Phase** Closing
Risk Level	*On Track*
Monthly Update	The final methodology report has been delivered to the PIs including reports for the newly added sample from Flint and Dearborn. The PIs have requested assistance in sorting out a possible discrepancy in the total faculty/staff population numbers from Ann Arbor. The numbers given to us from U-M HR are lower than they were in 2018. In 2021, we specified full-time students as this is what the sample consisted of. In 2018, that may have not been the case, as the total population request was not initiated by SRO in 2018. This might explain the discrepancy. The PI's have asked the project lead to contact HR and confirm the numbers were given are correct. If we were given the

wrong population numbers, weighting may need to be redone. Data collection ended 12/1/2021.

Special Issues

Cost
Jul 22, 2022

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

Projections
Jul 22, 2022

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

Measures

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

Other Measures

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

Project Status   Current

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

Principal Investigator/Client	James Wagner (University of Michigan) Robert Ursano (Uniformed Services University of the Health Scienc) Murray Stein / Ron Kessler (University of California San Diego / Harvard)
Funding Agency	Department of Defense
IRB	*HUM#:* HUM00180765 *Period Of Approval:* 4/21/22 - 4/20/23

Project Team

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

Proposal #:   no data

Description:

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

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

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

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

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

Milestone Dates

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

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

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

Report Period	June, 2022 (STARRS-LS Waves 3 & 4)	**Project Phase**	Implementing

Risk Level   *Some Concerns*

Monthly Update

☐   We have released 13 replicates (13,670 sample lines) and completed 10,010 interviews as of July 4. We continued to investigate and mitigate reasons for lower observed response rates in later replicates.

☐   We continued writing programming specifications and began programming both the Wave 4 survey and sample management system; we worked on defining procedures for Wave 4 interview verification and quality control.

☐   Slides for the July 12 GSC Meeting were sent to USUHS.

☐   We continued bi-weekly meetings with M&RA to coordinate Safety Plan and respondent locating activities.

☐   In response to a request from a member of the Office of the Chief of Chaplains to collect safety plan stats to get a general picture of how the safety plan is working, the U-M team discussed questions and concerns about the request and we sent a summary of the issues to M&RA/USUHS. We also joined a meeting with the Chaplain, M&RA and USUHS to discuss the issues.

☐   Quarterly Safety Plan tables were sent to USUHS on June 5.

☐   A formal budget for adding biosample flags, administrative variables and inventory document to the ICPSR public holdings was completed and sent to Dr. Ursano.

☐   The U-M Office of Research and Sponsored Projects (ORSP) received and started processing the Year 3 subaward.

☐   IRB:

o   The amendment for Wave 4 was approved by both the U-M and USUHS IRBs.

o   A Continuing Review for the old STARRS-LS protocol was approved by the U-M and USUHS IRBs. The IRB determined that annual continuing reviews are no longer required for this protocol.

☐   Annual Security Controls Review: We awaited the memo from AAG acknowledging the annual Information Assurance (IA) review.

☐   Annual NDI data request: The Repeat Request form was signed by USUHS and approved by the CDC. We awaited set-up of the Inter-Agency Agreement (IAA) for funding.

☐   We provided support for multiple analyst/biomarker group requests.

☐   Plans were made toward a presentation on STARRS data at ICPSR to be given by James and our ICPSR project manager at a Fall VA Cyber Seminar.

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

☐   We took steps to investigate and mitigate reasons for lower observed response rates:

o   The Army is undergoing an email transition from @mail.mil to @army.mil. In case this has caused a problem in our being able to reach respondents, we asked M&RA for help with looking up the Replicate 12 Army sample lines to identify individuals who have new Army email addresses.

☐   M&RA completed the lookups for the ~380 Replicate 12 Army sample lines. 324 Army emails were found, 86 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   We know that interviewer staffing shortages are still contributing somewhat to the lower observed response rates. Out of the three interviewers we trained in May, only one continues to work on the project. One person never fully engaged after training and didn't complete certification, and a second completed a number of STARRS-LS interviews but found the content too emotionally difficult to administer. (The third interviewer is doing great and has completed quite a few interviews.) We have offered overtime, bonus pay (not paid by STARRS), and asked staff to pick up extra shifts whenever possible. The staff shortage should become less of a problem after mid-July when only smaller Replicates 13 and 14 remain.

☐   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. 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). Reasons for the increased cost estimates include a longer survey instrument time for CATI and associated costs for recruiting and interviewing respondents, increased hours for programming instrument changes, and an increase in SRO interviewer base pay rates due to higher than expected inflation. 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
May 31, 2022

Total Cost to Date (Direct + Indirect):	5,004,766.13
Estimated Cost at Completion (E$AC):	12,905,411.16
Total Budget:	12,809,390.00
Variance (Budget minus E$AC):	-96,021.16
Reason For Variance:	After making updates to the projections, the overall overrun decreased by about $100,000 ($96,021 compared to last month's $191,764). The main changes contributing to the decrease were the removal of placeholder training hours in the month of June (training hours hit in May) and adjustment of the mobile device recharge now that almost all of our interviewers are working onsite and do not have assigned cell phones.

Projections
May 31, 2022

Dollars Projected For Month:	361,135.96
Actual Dollars Used:	264,580.35
Variance (Projected minus Actual):	96,555.61
Reason For Variance:	We spent significantly less than projected (Actuals: $264,580; Projected: $361,136). The variance was due to continued IWer staffing shortages (316 hours charged; 611 hours projected) and staff members being stretched and not able to spend the projected hours on STARRS.

Measures

	Units Complete	RR	HPI
Current Goal:		83.8	8.9
Goal at Completion:		83	8
Current actual:		77.4	10.1
Estimate at Complete:		78	10
Variance:		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:	
Production Manager:	

Proposal #: no data

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

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

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

Milestone Dates

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

Other Project Team Members:	Kallan Larsen - PSM MS Student
	Ai Rene Ong - PSM PhD Student
	Tianheao Wang - PSM MS Student
	Kevin Jensen (TSG) - portal/Blaise programming
	Shanti Suresh, Matt Hanger, & Laura Yoder (TSG) - data management
	Kyle Goodman - MSMS set-up programming
	Jim Rodgers - MSMS consultation
	Brady West - Research Associate Professor, Survey Research Center
Other Project Names:	Video Communication Technologies
Sample Mgmt Sys	MSMS
Data Col Tool	Blaise 5
Hardware	Desktop; Other (Webcam, USB headset)
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group; Other (CloudResearch (TurkPrime))
Payment Type	Cash, prepaid ($2); Other (ABS=$2 giftcode -> prepaid; $20/$22 giftcode -> post)
Payment Method	Imprest Cash Fund from ISR Business Office; Other (TurkPrime (now CloudResearch))

Report Period	June, 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 July.

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

Kallan is working on the recruitment and participation paper. She is documenting the R code for eventual release as part of the documentation at ICPSR. She also provided some information to provide in the revisions of the MDA paper.

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

Kallan updated ownership from her to Andrew for any VCT items she owned on Google Drive.

Fred, Andrew, and Kallan will meet in July to discuss an outline for an AAPOR webinar they are giving in the fall.

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

Special Issues

Cost

Total Cost to Date (Direct + Indirect):	376,960.01
Estimated Cost at Completion (E$AC):	376,960.01
Total Budget:	377,455.00
Variance (Budget minus E$AC):	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
Current Goal:	855	20%	
Goal at Completion:	855		
Current actual:	1,109	12.5%	
Estimate at Complete:			
Variance:			

Other Measures

Survey Research Operations

Monthly Project Report

Development Initiative and No Data Collection Projects

June 2022

Developmental Initiatives

TSME 22-Blaise 5 Testing
TSME22-Day in the Life Videos
TSME22-DCO Tech System Support
TSME22-PIPPA 2.0
TSME22-Self-Scheduling Interface for MSMS
TSME22-ST international

Developmental/Initiative Projects Dashboard

NonArchived Development Initiative and No-DataCol Projects

Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr	May	Jun
TSME 22-Blaise 5 Testing (423562)	Initiatives	Initiation	Gina-Qian Yang Cheung	🟢	🟢	🟢	🟢	🟢	🟢
TSME SRO SYS MAINTENANCE-GENERAL (483910)	Initiatives	Implementing	Jeffrey L Smith	🟢	🟢	🟢	🟢	🟢	☐
TSME22 Day in the life of Video	Initiatives	Closing	Vivienne Y Outlaw	🟢	🟢	🟢	🟢	🟢	🟢
TSME22 DCO Tech System Support FY22	Initiatives	Implementing	Vivienne Y Outlaw	🟡	🟢	🟡	🟡	🟡	🟡
TSME22-PIPPA	Initiatives	Implementing	Mark Simonson	🟢	🟢	🟡	🟢	🟡	🟢
TSME22-SelfSchedUI (483424)	Initiatives	Planning	Andrew L Hupp	🟢	🟢	🟢	🟢	🟢	🟢
TSME22-ST international (483227)	Initiatives	Initiation	Gina-Qian Yang Cheung	🟢	🟢	🟢	🟢	🟢	🟢

Project Name	(TSME 22-Blaise 5 Testing (423562)) TSME 22-Blaise 5 Testing (423562)
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

Project Status Current

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

Principal Investigator/Client

Funding Agency

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

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

Proposal #: no data

Description: this project for testing Blaise new features

SRO Project Period 08/2021 - 06/2022
Data Col Period
Security Plan NA
Milestone Dates

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

Other Project Team Members:
Other Project Names:

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

Report Period	June, 2022 (TSME 22-Blaise 5 Testing

Project Phase Initiation

Risk Level *On Track*

Monthly Update Work on a few of Blaise 5 related issues

Special Issues na

Cost
Jul 14, 2022

Total Cost to Date (Direct + Indirect):	0.00
Estimated Cost at Completion (E$AC):	0.00
Total Budget:	30,000.00
Variance (Budget minus E$AC):	30,000.00
Reason For Variance:	finish a few of B5 new release testing

Projections
Jul 14, 2022

Dollars Projected For Month:	2,654.20
Actual Dollars Used:	-11,929.37
Variance (Projected minus Actual):	14,583.57
Reason For Variance:	testing

Measures

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

Other Measures

Project Name	(TSME22 Day in the life of Video) TSME22-Day in the Life Videos (425201)
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives **Project Status** Current
Budget	*Direct Budget:* 12,500.00 *InDirect Budget:* 0.00 *Total Budget:* 12,500.00
Principal Investigator/Client	
Funding Agency	
IRB	*HUM#:* *Period Of Approval:*
Project Team	*Project Lead:* Vivienne Y Outlaw
	Budget Analyst: Carl S Remmert
	Production Manager:
	Senior Project Advisor:
	Production Manager:
	Production Manager:
Proposal #:	no data
Description:	Funding to be used to update the Day in the Life videos for both the field and SSL.
SRO Project Period	07/2021 - 06/2022
Data Col Period	
Security Plan	NA

Milestone Dates

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

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

Report Period	June, 2022 (TSME22 Day in the life of \ **Project Phase** Closing	
Risk Level	*On Track*	
Monthly Update	no activity - project is completed	
Special Issues		

Cost
Jul 22, 2022

Total Cost to Date (Direct + Indirect):	0.00
Estimated Cost at Completion (E$AC):	0.00
Total Budget:	12,500.00
Variance (Budget minus E$AC):	12,500.00
Reason For Variance:	Final edits done leaving $59 surplus

Projections
Jul 22, 2022

Dollars Projected For Month: 0.00
Actual Dollars Used: -12,440.47
Variance (Projected minus Actual): 12,440.47
Reason For Variance: no variance

Measures

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

Other Measures

Project Name	(TSME22 DCO Tech System Support FY22) TSME22-DCO Tech System Support (483248)
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

Project Status Current

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

Principal Investigator/Client

Funding Agency

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

Proposal #:	no data
Description:	This includes all the support and development work for a suite of tech systems DCO uses, including Fred, Recruitment Website, Iwer Web Site, etc.

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

Milestone Dates

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

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

Report Period	June, 2022 (TSME22 DCO Tech System	**Project Phase**	Implementing
Risk Level	Some Concerns		

Monthly Update	1. Finish the new DCSR Applicant Portal and Administration site for R to enter contact info.
	2. Clean up and update EMS manager list in Fred.
	3. Continue to work on programming modules on WordPress.
	4. Update UI for Payrate Upload File template.
	5. Add the Display_Name download/update time to Fred.
	6. Discuss new Status: Vacation.

Special Issues

Cost
Jul 22, 2022

Total Cost to Date (Direct + Indirect):	0.00
Estimated Cost at Completion (E$AC):	0.00
Total Budget:	30,000.00
Variance (Budget minus E$AC):	30,000.00
Reason For Variance:	programming support needed to maintain DCO Systems exceeded allotted budget

Projections
Jul 22, 2022

Dollars Projected For Month:	2,102.96
Actual Dollars Used:	-31,641.49
Variance (Projected minus Actual):	33,744.45
Reason For Variance:	programming support needed to maintain DCO Systems exceeded allotted budget

Measures

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

Other Measures X

Project Name	(TSME22-PIPPA) PIPPA 2.0 (425198)				
Project Mode	Primary: Not Available				
Project Type	Developmental Initiatives		**Project Status**	Current	
Budget	*Direct Budget:* 18,174.00	*InDirect Budget:* 0.00		*Total Budget:* 18,174.00	

Principal Investigator/Client

Funding Agency

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

Proposal #: no data

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

SRO Project Period 07/2020 - 06/2021

Data Col Period

Security Plan NA

Milestone Dates

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

Other Project Team Members:	Sarah Broumand, Cheng Zhou, Andrew Piskorowski
Other Project Names:	
Sample Mgmt Sys	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	June, 2022 (TSME22-PIPPA)	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update Created generic SurveyTrak queries. Implement queries in July (Andrew/Sarah).

Special Issues

Cost **Jun 30, 2022**	*Total Cost to Date (Direct + Indirect):*	0.00
	Estimated Cost at Completion (E$AC):	0.00
	Total Budget:	18,174.00
	Variance (Budget minus E$AC):	0.00
	Reason For Variance:	

Projections
Jun 30, 2022

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

Measures

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

Other Measures

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

		Project Status	Current

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

Principal Investigator/Client

Funding Agency

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

Project Team   *Project Lead:*   Andrew L Hupp

Budget Analyst: Megan Gomez-Mesquita

Production Manager:

Senior Project Advisor:

Production Manager:

Production Manager:

Proposal #:   no data

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

SRO Project Period   07/2021 - 06/2020

Data Col Period

Security Plan   NA

Milestone Dates

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

Other Project   James Rodgers - Tech Lead

Team Members: Holly Ackerman - Developer (MSMS API and other appointment related work)

Peter Sparks - Developer (R facing page)

Other Project Names:

Sample Mgmt Sys	NA
Data Col Tool	Blaise 5
Hardware	NA
DE Software	N/A
QC Recording Tool	N/A
Incentive	Not used
Administration	N/A
Payment Type	N/A
Payment Method	N/A

Report Period	June, 2022 (TSME22-SelfSchedUI (483	**Project Phase**	Planning
Risk Level	*On Track*		

Monthly Update   Nothing to report on the work to be done. The work will occur in the next fiscal year and will be largely on Andrew P. and Mark.

Andrew H. will meet with Mark and Andrew P. to discuss the design in July. From there, Andrew will touch base with the budget analyst about making budget projections and creating a timeline and specifications. Rachel asked that the SRO PSID team be kept in the loop on progress.

Special Issues

Cost

Total Cost to Date (Direct + Indirect):	1,841.46
Estimated Cost at Completion (E$AC):	9,920.34
Total Budget:	10,000.00
Variance (Budget minus E$AC):	79.66
Reason For Variance:	Projections will need to be redone in the next fiscal year.

Projections

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

Measures

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

Other Measures

Project Name	(TSME22-ST international (483227)) TSME22 - ST international (483227)
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

Project Status   Current

Budget	*Direct Budget:*	40,000.00	*InDirect Budget:*	0.00	*Total Budget:* 40,000.00

Principal Investigator/Client

Funding Agency

IRB	*HUM#:*		*Period Of Approval:*
Project Team	*Project Lead:*	Gina-Qian Yang Cheung	
	Budget Analyst:	Janelle P Cramer	
	Production Manager:		
	Senior Project Advisor:		
	Production Manager:		
	Production Manager:		

Proposal #:	no data
Description:	this is a continued effort for ST international work

SRO Project Period	01/1996 - 01/1996
Data Col Period	
Security Plan	NA

Milestone Dates

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

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

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Report Period	June, 2022 (TSME22-ST international	**Project Phase**	Initiation
Risk Level	*On Track*		
Monthly Update	added new features in FUM		
Special Issues	NO		

Cost **Jul 14, 2022**	*Total Cost to Date (Direct + Indirect):*	0.00
	Estimated Cost at Completion (E$AC):	0.00
	Total Budget:	40,000.00
	Variance (Budget minus E$AC):	40,000.00
	Reason For Variance:	finished a few updates in ST international side

Projections
Jul 14, 2022

Dollars Projected For Month:	4,689.93
Actual Dollars Used:	-33,166.89
Variance (Projected minus Actual):	37,856.82
Reason For Variance:	had time to work

Measures

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

Other Measures