Survey Research Operations

Monthly Project Report

Sponsored

October 2022

Sponsored Projects

(AFHS) American Family Health Study
(AFHS-Additional work) American Family Health Study - additional work
(BFY) Baby's First Years
(CARE Military) Concussion Assessment, Research and Education (CARE) Consortium 2022 - Military
(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022
(CRUSE - AHDFS) Survey on Crypto-Asset Adoption and Use / American Household Digital Finance Survey
(ECHO (Year 7)) 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
(HRS HOC) Health and Retirement Study – Historical Occupation Coding
(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
(PSID23) Panel Study of Income Dynamics Core 2023
(PSID23 Online Contact Update) Panel Study of Income Dynamics 2023 Online Contact Update
(PSID-PR) Puerto Rico Panel Study of Income Dynamics
(SCA 2022) Surveys of Consumer Attitudes
(SCIP 2021) Sustainability Culture Indicators Project
(STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study

Sponsored Projects Dashboard

NonArchived Sponsored Projects

Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
AFHS	Sponsored	Closing	Rebecca Gatward	🟢	🟡	🟢	🟡	🟢	🟢	🟢	🟢	🟢	🟢
AFHS-Additional work	Sponsored	Implementing	Rebecca Gatward	☐	☐	☐	☐	🟢	🟢	🟢	🟢	🟢	🟢
BFY	Sponsored	Implementing	Piotr Dworak	🟢	🟢	🟢	☐	🟢	🟢	🟢	🟢	🟢	🟢
CARE Military	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	☐	☐	☐	☐	🟢	🟢	🟢	🟢	🟢	🟢
CARE SALTOS MTEC	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟡	🟢	🟢	🟢	🟢	🟢	🟢
CRUSE - AHDFS	Sponsored	Implementing	Piotr Dworak	☐	☐	☐	☐	☐	☐	🟡	🟢	🟢	🟢
ECHO (Year 7)	Sponsored	Implementing	Shonda R Kruger-Ndiaye	🟢	🟢	🟡	🟡	🟡	🟡	🟡	🟡	🟢	🟢
EDC Midline	Sponsored	Closing	Barbara Lohr Ward	🟢	🟢	🟡	🟢	🟢	🟢	🟢	🟢	🟢	🟢
EDC-SS Phases 3-4	Sponsored	Implementing	Karin Schneider	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
HCAP 2022	Sponsored	Implementing	Maureen Joan O'Brien	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
HRS 2021 OYMS / COVID Survey	Sponsored	Closing	Ian Ogden	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
HRS 2022 Panel	Sponsored	Implementing	Evanthia Leissou	🟡	🟢	🟡	🟡	🟡	🟢	🟡	🟢	🟢	🔴
HRS HOC	Sponsored	Planning	Gloria J Baker	☐	☐	☐	☐	☐	☐	☐	☐	☐	🟡
HRS2022-Screening	Sponsored	Implementing	Evanthia Leissou	🟢	🟢	🟡	🟢	🟡	🟢	🟢	🟢	🟡	🟡
IHDS3	Sponsored	Implementing	Sarah Elisa Broumand	☐	🟢	☐	🟢	🟢	🟢	🟢	🟢	🟡	🟡
MI CReSS (Year 2)	Sponsored	Implementing	Sarah Elisa Broumand	🟢	🟢	🟢	🟢	🟢	🟢	🔴	🟢	🟢	🟢
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	☐	☐	☐	🟢	🟢	🟢	🟢	🟢	🟢	🟢
PSID23	Sponsored	Implementing	Rachel Anne Orlowski	☐	☐	☐	☐	☐	☐	🟡	🟡	🟡	🟡
PSID23 Online Contact Update	Sponsored	Implementing	Camila Kendall	☐	☐	☐	🟢	🟢	🟢	🟡	🟢	🟢	🟢
PSID-PR	Sponsored	Implementing	Shonda R Kruger-Ndiaye	☐	☐	☐	🟢	🟢	🟢	🟢	🟢	🟢	🟢
SCA 2022	Sponsored	Implementing	Theresa Camelo	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟡	🟢
SCIP 2021	Sponsored	Closing	Maureen Joan O'Brien	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
STARRS-LS Waves 3 & 4	Sponsored	Implementing	Meredith A House	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡

Project Name	(AFHS) American Family Health Study		
Project Mode	Primary: Web Secondary: Mail Total of Modes: 3		
Project Type	Sponsored Projects	**Project Status**	Current
Budget	**Direct Budget:** 1,596,238.00	**InDirect Budget:** 893,895.00	**Total Budget:** 2,490,133.00

Principal Investigator/Client

Brady West (Survey Research Center)
William Axinn, Mick Couper and James Wagner (Survey Research Center)

Funding Agency National Institutes of Health (NIH)

IRB **HUM#:** 00167171 ***Period Of Approval:***

Project Team

Project Lead:	Rebecca Gatward
Budget Analyst:	Dean E Stevens
Production Manager:	Lloyd Fate Hemingway
Senior Project Advisor:	Grant D Benson
Production Manager:	
Production Manager:	

Proposal #: no data

Description:

The American Family Health Study is a methodological project which aims to evaluate the feasibility of collecting national family, fertility and reproductive health data on a nationally-representative sample using a self-administered mode that is comparable to data collected with an in-person (interviewer-administered) study.

We plan to screen around 42,120 randomly selected U.S. households by mail and web to identify an eligible population (aged 18-49 years). The screening work will be divided across two successive nine month periods (n=21,060 per effort). Each 'replicate' is a fully representative sample of U.S. households. Eligible respondents will be invited to complete three modules of content (administered separately or one instrument), either online or a paper questionnaire. The plan is obtain at least one returned module from 4,000 respondents.

There will be a two month gap between replicates. The first replicate will begin in September 2019 and the second in around July 2020.

The sample (addresses) will be selected via Market Systems Group (MSG). The following response assumptions have been made: at the screening stage, we estimate a response rate of 50% (around 21,000). Of these we expect approximately 12,000 addresses to contain an eligible person. In households with more than one eligible person we will randomly select one person.

The contact protocol for the screener and main data collection is designed to, initially, push completion by web. Addresses or selected participants will only be mailed a paper screener or questionnaire after reminders encouraging completion online. This is a recent change to the protocol and was made after the SRO budget proposal was provided to the PI.

The main interview consists of three modules which will replicate almost all NSFG content. The PI group is leading the process of reviewing and translating the content to web format and will provide specifications for programming to SRO.

The following revisions have been made to the study design as detailed in the latest budget proposal (SRO scope of work);

o   We will use an external vendor to scan returned paper screeners, rather than manual data entry. This vendor will also format the paper forms, print materials and be responsible for most of the respondent mailings.

o   The original study design did not include web as a mode of data collection for screening. Additional funding from SRC has been obtained by the Principal Investigator to cover the development of a web screener and associated data management and reporting costs.

o   Telephone reminder calls remains one of the steps in the non-response protocol for the main data collection. However, it is likely that this effort will be targeted to a subset of the selected sample, rather than across the entire sample.

o   The amount budgeted for the TOA for the screener was $2 and $5 – 50% of the sample to receive each amount. The TOA amount will now be $2 for the full sample. We may provide an additional TOA of $5 to a subset of the non-responders as part of one of the follow-up reminder mailings (depending on available budget).

o   The eligibility age range for the study has been changed from 15-49 to 18-49. This eliminates the need to contact to parents/guardians of all eligible respondents who have not reached the age of majority to gain consent to participate in the study. There are three states where the age of majority is above 18 years of age – in these states we will adjust the selection protocol as necessary.

o   A further change to the study protocol is around completion of the main modules. In some circumstances we

will provide Respondents the option to move directly to complete the main modules after completing the screener without being sent an invite in the mail/email to do so. This will only happen if the selected R is also the person who completed the screener.

o   An experiment around completion of the modules has been introduced to the protocol. Twenty per cent of the selected eligible respondents will be invited to complete the full 60 minute survey as one instrument, rather than completing three separate modules.

SRO Project Period	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, 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	Oct, 2022 (AFHS)	**Project Phase**	Closing

Risk Level	*On Track*

Monthly Update	October update Overspend amount has decreased by ~$900 due to refunded checks. Current SRO focus: Two additional components, AFHS Panel Feasibility Survey and AFHS non-response follow-up. These are reported on separately in MPR.
Special Issues	The additional scope (panel feasibility and non-response follow-up) will be funded using sequestered funds (on a separate short code). The PI group have also agreed to fund the overspend on the main AFHS budget.

Cost **Nov 20, 2022**		
Total Cost to Date (Direct + Indirect):	2,516,687.97
Estimated Cost at Completion (E$AC):	2,516,687.97
Total Budget:	2,490,133.00
Variance (Budget minus E$AC):	-26,554.97

Reason For Variance: *October 2022 update* - the projected overspend has decreased due to a refund applied to the project - ~$900 voided checks. We expect a further ~$2,500 to be refunded next month.

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
Nov 20, 2022**

Dollars Projected For Month:	0.00
Actual Dollars Used:	-1,419.60
Variance (Projected minus Actual):	1,419.60

Reason For Variance: Any additional spend will be charged to the short code for the 'AFHS additional work' - the overspend from the main AFHS and the additional work are being funded by sequestering funds.
A summary of costs to be funded by sequestering funds is attached (this includes the overspend on this project).

Measures

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

Other Measures

Project Name	(AFHS-Additional work) American Family Health Study - additional work
Project Mode	Primary: Web Secondary: Mail Total of Modes: 3
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 50,265.00 **InDirect Budget:** 0.00 **Total Budget:** 50,265.00
Principal Investigator/Client	Brady West (SRC)

Funding Agency   Internal UM sequestering funds
IRB   **HUM#:**   HUM00167171   **Period Of Approval:**
Project Team   **Project Lead:**   Rebecca Gatward
                          Budget Analyst: Dean E Stevens
                          Production Manager: Lloyd Fate Hemingway
                          Senior Project Advisor: Grant D Benson
                          Production Manager:
                          Production Manager:

Proposal #:   no data

Description: 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	Oct, 2022 (AFHS-Additional work)	**Project Phase**	Implementing

Risk Level   *On Track*

Monthly Update

October updates
SRO involvement is now minimal - responding to queries from a group of masters students working on data documentation and preparation for being made available to users (via ICPSR). (this work includes filling gaps in the MQDS documentation and merging 'IsVisited' data so missing values are appropriately assigned as 'refusal' or 'does not apply'.

Special Issues

Cost
Nov 20, 2022

Total Cost to Date (Direct + Indirect):	53,426.47
Estimated Cost at Completion (E$AC):	54,728.37
Total Budget:	50,265.00
Variance (Budget minus E$AC):	-4,463.37
Reason For Variance:	AFHS Feasibility Pilot Estimate – Expanded SRO # 22-0037R01 (Estimated costs at $47,000 - $53,000 direct costs. This estimate assumes that funding would be provided from UM internal sequestering funds and includes no indirect costs). The projections have been updated to include a few hours for two SRO team members for a small amount of hours to help with data documentation (mostly responding to queries from Masters Students who are helping prepare the documentation and the data (recoding missing values for all variables to 'does not apply' as necessary)).

The total cost at completion is still within the budgeted estimate ($47k-$53k)

A summary of costs to be funded by sequestering funds is attached.

Projections
Nov 20, 2022

Dollars Projected For Month:	1,643.06
Actual Dollars Used:	1,541.23
Variance (Projected minus Actual):	101.83
Reason For Variance:	Variance is very small.

Measures

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

Other Measures

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

Project Status Current

Budget	**Direct Budget:** 5,537,026.00	**InDirect Budget:** 1,959,617.73	**Total Budget:** 7,496,643.73

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

Description:	University of Michigan Survey Research Center (U-M SRC) is contracted to recruit and interview participants for Baby's First Years -- a longitudinal randomized control trial study.
	
	The study's full name, listed on sub-contract documents, is Household Income and Child Development in Early Years. The study will draw on a convenience sample of mothers and their newborns in four US metropolitan areas: New York City; Omaha/Lincoln; New Orleans; and Minneapolis. One or two hospitals, listed in this application, will be used as recruiting sites in each area. The study uses a randomized control trial design in which low-income mothers and newborns will be randomly assigned to a treatment group that receives an unconditional income enhancement -- cash payments of \$333 per month—an amount roughly comparable to a variety of income assistance policies in the U.S. and shown to be associated with meaningful improvements for poor children in prior studies—or to a control condition that receives \$20 per month. In both groups, the payments will be made for the first 40 months of the child's life. To understand the impacts of added income on children's development, researchers will assess treatment/control group differences at ages 1, 2 and 3 on measures of cognitive, language, memory, self-regulation and socio-emotional development. Recruitment is scheduled to start in April of 2018, and each follow-up interview will be conducted 12 months later -- close in time to the child's 1st, 2nd, and 3rd birthday. The feasibility of the approach has been established in a one-year pilot conducted in 2014 at the New York Presbyterian Hospital/Columbia University Medical Center.
	
	The Principal Investigators are Dr. Greg Duncan from University of California Irvine (UCI), Dr. Kimberly Noble from Teacher's College Columbia University (TCCU), and Katherine Magnuson from University of Wisconsin-Madison (UWM). UCI (Dr. Duncan) and TCCU (Dr. Noble) are the institutions and signatories funding the U-M SRC subcontract from various sources including the National Institute for Child Health and Human Development (NICHD) and private foundations listed in this application. The study research team also includes co-investigators Lisa Gennetian (New York University), and Hiro Yoshikawa (New York University).
	
	SRO will be responsible for four interactions with the selected mothers/infants:
	• Baseline will occur immediately (within 24-48 hours) after birth, in the hospital;
	• Wave 1 will be a telephone interview with the mother when the child is 12 months old;
	• Wave 2 will be an in-person interview in the family's home that includes survey, developmental assessment, biomarker collection, and video recorded behavioral interaction when the child is 24 months old;
	• Wave 3 will be an in-person survey done while the mother and child are visiting a lab for other clinical tests when the child is 36 months old.
	
	Each data collection phase/wave will be a full 12 months, with Baseline starting in April 2018:
	
	Recruitment/Baseline: 04/01/2018 - 03/31/2019
	          Wave 1: 04/01/2019 - 03/31/2020
	          Wave 2: 04/01/2020 - 03/31/2021
	          Wave 3: 04/01/2021 - 03/31/2022

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

Milestone Dates				
PreProduction Start:	10/01/2017		*Pretest 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)

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

Risk Level   *On Track*

Monthly Update   Project updates:

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

Between July 2022 and May 2023, interviewers continue conducting the Age3 + 3-month, +6-month, and +10-month check-in calls or visits 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 handing the cases off to the local lab research teams. The process continues to run smoothly; as of 11/28 we have handed off 570 of 1,000 cases.

During the September BFY advisory board meeting the SRO Field Team was asked to help Lab teams achieve their response rate targets. We were approved to reduce our underrun by ~ $24K to accommodate the expanded scope. In the initial proposal, the SRO Field team will 1) conduct line-by-line reviews and guide RAs/Site Coordinators in strategies for those cases, 2) provide in-service training similar to the training offered to our Iwers (e.g., addressing R concerns, etc.), and 3) directly reach out to and locate some hard-to-reach Rs. We initially received a list of 26 cases to re-activate and find. After finding the Rs we are to contact the local lab to facilitate scheduling the visit.

With PIs we also discussed but not yet pursued a deeper integration between our teams namely, asking our iwers to directly schedule the Lab visits and to assist in meeting Rs at the Lab sites to help out during the visits. These activities would require more integration with the lab scheduling systems and, at this time, the deeper integration is not yet pursued.

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

@ 3 month check-in 96% were confirmed
@ 6 month 92% were confirmed
@ 10 month 96% were confirmed and 364 cases were delivered to the lab

Age 3 Staffing:
12 iwers in total
NE: 1 OS + 1 NH (Trained 9/15)
MN: 2
NY: 4 OS (1 consolidated in October 2022)
NOLA: 1 (1 June resignation)
TLs: 1 (- 1 has gone to HRS)

Technical system:
All tech systems are working as needed.

Finances:
We are now projecting underrun - PIs approved using some of the underrun to increase SRO iwer assistance with hard-to-reach sample and the Age 4 Lab visits.

Special Issues

Cost
Nov 20, 2022

Total Cost to Date (Direct + Indirect):	6,773,087.96
Estimated Cost at Completion (E$AC):	7,430,350.72
Total Budget:	7,496,643.73
Variance (Budget minus E$AC):	66,293.01
Reason For Variance:	Underrun increased due to change in the funding mix. PIs requested SRO to use some of the underrun to assist with the Age 4 lab visits.

Projections
Nov 20, 2022

Dollars Projected For Month:	29,412.24
Actual Dollars Used:	60,414.43
Variance (Projected minus Actual):	-31,002.19
Reason For Variance:	Lower indirect but also savings in iwer and management time.

Measures

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

Other Measures

Project Name	(CARE Military) Concussion Assessment, Research and Education (CARE) Consortium 2022 - Military
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 1,131,747.00 **InDirect Budget:** 294,254.00 **Total Budget:** 1,426,001.00
Principal Investigator/Client	Dr. Steven Broglio (U of M Kinesiology) Dr. Micheal McCrea /Dr. Pasquina (Medical College of Wisconsin/Uniformed Dr. Thomas McAllister (Indiana University School of Medicine)
Funding Agency	NCAA and DoD
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 $1,426,001.00. This includes $1,131,747.00 direct and $294,254.00 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders).

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	Other (Kinesiology)
Payment Type	Check, post ($150)
Payment Method	Other (Kinesiology)

Report Period	Oct, 2022 (CARE Military)
Risk Level	*On Track*

Project Phase   Implementing

Monthly Update

Project Management:
-Continue to meet with PI team staff to discuss topics related to next data collection wave.
-Continue to work with the PM and TLs to strategize and boost production.
-Continue to work with the Military PI teams for updated military emails. Outdated military emails greatly affected the success of reaching out to the respondents and the response rates overall.
-Continue to work with the PI team on implementing rewards system to motivate interviewers during the month of December 2022 to Jan 2023 to increase the response rate.

Care SMS system update:
-Currently working on a solution for handling specific respondent's related issues with QG.
-Continue to work with QG on the last sample release timeline for the current wave.
-Currently communicating with other parties to prepare the next wave of data collection.

Production:
- Interviewers were able to start working lines affected by Hurricane Ian again in late October.
- The PC and TLs continued to develop some new strategies in keeping interviewers focused and motivated, such as focusing on Military samples during the Veteran's Day week.
-Strategize to get interviewers fulfilling their minimum hours commitment, such as offered to all interviewers to work up to 40 hours per week in order to push the production ahead of the projected goal.
-Continue to host two Team Calls per week to boost productivity, reinforce best field practice protocols, and share experiences among the interviewers.
- Production Stats (as of 10/31/2022)=(Combined) total completes=16541
Civilian (8182 Releases): Total Comp Iws-2080-25.5%(Web-2054-25.2%, CATI-26-0.3%)
Military (8359 Releases): Total Comp Iws-1718-20.6%(Web-1697-20.4%, CATI-21-0.3%)

DMSS
- Made some adjustment of sample cases for reporting purposes.

Locating:
-heavy efforts on locating.
-Continue to work with the PI team staff on using social media tools to contact potential respondents.

Special Issues

Cost
Oct 31, 2022

Total Cost to Date (Direct + Indirect):	623,539.48
Estimated Cost at Completion (E$AC):	1,355,261.14
Total Budget:	1,426,001.00
Variance (Budget minus E$AC):	70,739.86
Reason For Variance:	Extra funding of $100,000 (direct cost) and $26,000 (indirect cost) were added to the project after the proposed budged was finalized. We have been strategizing to boost production and minimize the underrun through the next few months.

Projections
Oct 31, 2022

Dollars Projected For Month:	102,190.98
Actual Dollars Used:	114,793.10
Variance (Projected minus Actual):	-12,602.12
Reason For Variance:	Some interviewers spent more hours than projected hours on military samples in order to booster the production which contributed to higher response rate than we expected.

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
Budget	**Direct Budget:** 3,718,978.00 **InDirect Budget:** 966,936.00 **Total Budget:** 4,685,914.00

Project Status Current

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	Oct, 2022 (CARE SALTOS MTEC)	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update

Project Management:
-Continue to meet with PI team staff to discuss topics related to next data collection wave.
-Continue to work with the PM and TLs to strategize and boost production.
-Continue to work with the PI team on implementing rewards system to motivate interviewers during the month of December 2022 to Jan 2023 to increase the response rate.

Care SMS system update:
-Currently working on a solution for handling specific respondent's related issues with QG.
-Continue to work with QG on the last sample release timeline for the current wave.
-Currently communicating with other parties to prepare the next wave of data collection.

Production:
- Interviewers were able to start working lines affected by Hurricane Ian again in late October.
- The PC and TLs continued to develop some new strategies in keeping interviewers focused and motivated, such as focusing on Civilian samples in one week prior to switching to Military samples entirely week. The experiment has very impressive results.
-Strategize to get interviewers fulfilling their minimum hours commitment, such as offered to all interviewers to work up to 40 hours per week in order to push the production ahead of the projected goal.
-Continue to host two Team Calls per week to boost productivity, reinforce best field practice protocols, and share experiences among the interviewers.
- Production Stats (as of 10/31/2022)=(Combined) total completes=16541
Civilian (8182 Releases): Total Comp Iws-2080-25.5%(Web-2054-25.2%, CATI-26-0.3%)
Military (8359 Releases): Total Comp Iws-1718-20.6%(Web-1697-20.4%, CATI-21-0.3%)

Hiring and Training:
-started discussing with the project team staff on the field staff list for the next wave of data collecton.

DMSS
- Made some adjustment of sample cases for reporting purposes.

Locating:
-heavy efforts on locating.
-Continue to work with the PI team staff on using social media tools to contact potential respondents.

Special Issues

Cost
Oct 31, 2022

Total Cost to Date (Direct + Indirect):	641,710.00
Estimated Cost at Completion (E$AC):	4,680,074.84
Total Budget:	4,685,914.00
Variance (Budget minus E$AC):	5,839.16
Reason For Variance:	We have been paying attention to the underrun amount through the months. We are strategizing to reduce the underrun amount. The underrun amount will be likely to close to budget in the next several years.

Projections
Oct 31, 2022

Dollars Projected For Month:	87,531.79
Actual Dollars Used:	55,744.72
Variance (Projected minus Actual):	31,787.07
Reason For Variance:	

Measures

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

Other Measures

Project Name	(CRUSE - AHDFS) Survey on Crypto-Asset Adoption and Use / American Household Digital Finance Survey
Project Mode	Primary: Web Secondary: Focus Group Total of Modes: 2

Project Type	Sponsored Projects		Project Status	Current

Budget	**Direct Budget:**	492,515.00	**InDirect Budget:**	142,829.00	**Total Budget:**	635,344.00

Principal Investigator/Client — Vikramaditya Khanna (UM Law School)

Funding Agency

IRB

	HUM#:	HUM00214234	**Period Of Approval:**	1/1/2022-12/31/2022

Project Team

Project Lead:	Piotr Dworak
Budget Analyst:	William Lokers
Production Manager:	
Senior Project Advisor:	Lisa S Holland
Production Manager:	
Production Manager:	Ian Ogden

Proposal #: no data

Description: Revised project costs are $635,344 ($625,726 + $9,618). Original description below. Focus groups completed as designed. Project has been revised in that the PI has requested only an initial replicate be used for the survey pending full funding availability. Also, full indirect rate is not applied as we originally indicated. ORSP and Financial Services determined this was not research but was in fact other sponsored activity. IDC revised to 29%.
ORIGINAL DESCRIPTION:
SRO will conduct two exploratory focus groups and web-based data collection to study awareness, use and adoption of crypto-assets in the general population and more specifically among those more informed about crypto-assets. SRO will screen an address-based representative sample of approximately 40,980 U.S. households for adults who hold or have held crypto-assets. All who report crypto-asset holdings will be invited to participate in the web survey, along with a random sub-sample of those who have not held crypto-assets. SRO interviewers will conduct reminder calling to non-respondents to encourage them to participate in the survey.

This budget assumes an overall SRO involvement period of 12 months commencing in May 2022 with focus groups taking place in May or early June 2022 and the web data collection taking place during a 5-month period beginning September 2022. The total cost for this work is estimated at $1,724,766 ($1,105,619 direct, $619,147 indirect), budgeted at the University-approved indirect recovery rate of 56 percent.
 $635,344 ($625,726 + $9,618).

SRO Project Period	05/2022 - 04/2023
Data Col Period	10/2022 - 02/2023
Security Plan	NA

Milestone Dates

PreProduction Start: 08/01/2022	**Pretest Start:**
Pretest End:	**Recruitment Start:** 09/14/2022
Staffing Completed: 10/14/2022	**GIT Start:** 11/29/2022
SS Train Start: 11/29/2022	**SS Train End:** 11/29/2022
DC Start: 11/02/2022	**DC End:** 03/01/2023

Other Project Team Members:	Karin Schneider conducted focus group. Survey phase led by Piotr Dworak. Team include Ian Ogden and Xiomara Guerra.
Other Project Names:	American Household Digital Finance Survey
Sample Mgmt Sys	Web SMS
Data Col Tool	Blaise 4.8
Hardware	Other
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group
Payment Type	Cash, prepaid ($2); Other (survey completes paid by check)
Payment Method	Check through other system (focus groups recd e-gift card (Tango))

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

Risk Level   *On Track*

Monthly Update

Crypto data collection has launched on 11/3 with 507 invitations to Rep 1 and other Reps followed soon. Rep sizes and launch dates are listed below.

1: 507 11/3/2022
2: 2,049 11/10/2022
3 & 4: 7,684 11/15/2022
Total: 10,240

As of 11/28 we have 695 of the 1529 goaled completes representing 6.8% response rate (goal 14.9%).

In the partial unweighted data 15% of respondents report currently owning and 18% report currently or ever owning Crypto (coin or asset). Pew reported a similar range -- 16% -- of "ever" investors in August 2022.
https://www.pewresearch.org/fact-tank/2022/08/23/46-of-americans-who-have-invested-in-cryptocurrency-say-its-done-worse-than-expected/

Next steps:

Remaining mailings:
- Rep 1 received Inv + Reminder 1 + Reminder 2
- Rep 2 is mailed Reminder 2 on 11/29
- Rep 3 was mailed Reminder 1 on 11/21 and will be mailed Reminder 2 on 12/3
- We are planning to send the final end-game Reminder 3 to all replicates at the same time in January.

Non-Response Follow Up via Phone / SSL:

- Sample files received from MSG exceeded expectations for the number of phone numbers included. We were expecting 50% records to have an appended phone and received 69% of phone appends and mostly cell phones. It remains to be seen how many of the phones are valid.

- On 11/29, we are training 14 Iwers + TLs on the non-response follow up using WSMS.

Special Issues

Cost
Nov 20, 2022

Total Cost to Date (Direct + Indirect):	124,610.89
Estimated Cost at Completion (E$AC):	650,717.92
Total Budget:	635,344.00
Variance (Budget minus E$AC):	-15,373.92
Reason For Variance:	Most work occurred in October, need to adjust projections moving forward to get back within the budgeted amount. Also, expect lower cost of mailings but slightly more iwer time.

Projections
Nov 20, 2022

Dollars Projected For Month:	45,515.67
Actual Dollars Used:	40,295.29
Variance (Projected minus Actual):	5,220.38
Reason For Variance:	We increased tech allocations to account for October work. Moving forward some of those can be reduced.

Measures

	Units Complete	RR	HPI
Current Goal:	1529	14.9%	
Goal at Completion:	1529	14.9%	
Current actual:	695	6.9%	
Estimate at Complete:	1529	14.9%	
Variance:			

Other Measures

Project Name	(ECHO (Year 7)) 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:** 384,033.00 **InDirect Budget:** 215,058.00 **Total Budget:** 599,091.00
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:** Shonda R Kruger-Ndiaye **Budget Analyst:** William Lokers **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 - 08/2023
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
Steven Sonoras: Project Manager
Nahid Sultana: Project Manager
William Lockers: Financial Analyst
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	Oct, 2022 (ECHO (Year 7))	**Project Phase**	Implementing
Risk Level	*On Track*		

Monthly Update

This is the first MPR being completed the Shonda (the nominal SRO Lead in the new model of shared project leadership).

[Phase 1: Recruitment and Prenatal Surveys]

The MARCH recruitment target is 1,110 mothers / live births. There are approx. 22 more participants needed to complete the sample. MSU estimates that recruitment will conclude in 2022.

[Phase 2: 3-Month Data Collection Summary as of 11/21/22]
    3-month sample released: 926
    3-month interviews completed: 667
    Average attempts / Iw: 7.8
    Iw length: 35 min.
    Response Rate: 73%
    3-month biospecimen collected: 382

[Phase 3: Age 4 REDCap Survey as of 11/21/22]

    Age-4 sample released: 166
    REDCap surveys completed: 94
    Response Rate: 57%

[Phase 3: Age 4 In-Person Visit Protocols as of 11/22/22]

    Age-4 IPV sample released: 74

In-person visits completed: 31

Note: 50 IPVs were budgeted for Y7. It appears that we may exceed this count unless measures are taken to curtail production. This topic will be discussed with MSU and the U-M PI to confirm a plan compatible with available budget.

Data collection for the in-person visits includes physical measures, biospecimen and cognitive assessment components outlined in previous monthly reports.

Special Issues

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

Cost
Nov 21, 2022

Total Cost to Date (Direct + Indirect):	49,600.38
Estimated Cost at Completion (E$AC):	598,235.94
Total Budget:	599,091.00
Variance (Budget minus E$AC):	855.06
Reason For Variance:	In addition to typical projection refinement, Eva, Shonda, and Bill updated projections to reflect the new plan for shared project leadership. Terri's hours were removed and hours were added for Shonda. An unnamed SSS was projected at 32 hrs/mo. If additional management resources are identified following PDMG's current hiring, we may spend this projection on management support. Otherwise, funds could be reallocated in discussion with Mike and MSU (e.g. to cover additional in-person visits).

Projections
Nov 21, 2022

Dollars Projected For Month:	39,161.30
Actual Dollars Used:	49,148.24
Variance (Projected minus Actual):	-9,986.94
Reason For Variance:	Production and Project Management hours came in higher than projected. The biggest variance was that no hours were projected for Terri in October but 132 hours were charged.

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	Oct, 2022 (EDC Midline)	**Project Phase**	Closing
Risk Level	*On Track*		

Monthly Update	During October 2022, SRC activities on the EDC Midline and EDC Endline project included the following:

Task 1: Management, Budget and Work Plan
• Participated in project meetings with ORL to discuss scope, cost projections and schedule for EDC Endline
o Held in-person meetings on October, 5, 6, and 7 to discuss Endline work scope parameters and data collection protocol
• Reviewed monthly project expenses for Midline and Endline. Updated projections.
• Assembled the technical team for Endline and began discussing systems changes, drafted initial outline of Endline workflow and very high-level initial schedule for development

- Reviewed/specified further Endline questionnaire edits, provided to programmer
- Worked with programmers to outline changes to SurveyTrak-Telephone and SurveyTrak-In Person for Endline
- Worked with programmers to outline changes to self-scheduler for Endline centralized in-person survey administration.
- On-boarded staff assisting with questionnaire testing
- Updated and submitted the UM IRB Continuing Review application

Task 2: Sampling
- No activity this month

Task 3: Questionnaire Development
- Conducted testing on the Endline telephone instrument
- See Management Task for other questionnaire development activities

Task 4: CAI Programming
- Continued programming Endline telephone questionnaire changes resulting from testing, further specification development.
- Prepared stand-alone applications for demonstration during in-person meetings
- Prepared initial in-person instrument based on code from EDC Baseline

Task 5: Systems Programming
- Sample Management Systems
o Continued editing of SurveyTrak specifications for Endline
o Conducting initial testing in SurveyTrak
o Archived EDC Midline databases, reports
- Self-Scheduler
o Set up Endline telephone application
o Programmed the framework for the Endline centralized in-person self-scheduler, using specifications provided during in-person meetings with research team.
- Reporting systems
o Set up initial Webtrak structure for EDC Endline

Tasks 6, 7: Interviewer Recruitment & Hiring, Training
- Posted for on-staff personnel for interviewer, team leader and production coordinator positions. Reviewed applications, assigned interviews, negotiated interviewer sharing agreements.
- Prepared specifications for Endline training. Met with training logistics team to finalize specification.
- Issued RFPs for conference centers for Endline training

Task 8: Main Data Collection
- Processed paperwork to remove interviewers from the Midline project, conducted and entered interviewer evaluations based on Midline work.
- Processed remaining interviewer time and expense receipts, reconciled final travel advances
- Received and returned to inventory final shipments of interviewer equipment and supplies

Task 9: Post Collection Processing
- No activity this month

Task 10: Weighting
- No activity this month

Task 11: Final Data Deliverables
- No activity this month

Areas Requiring Attention:
Current Updates:
- We continue to project a substantial underrun for the Midline 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. Final overall HPI: 3.01.

- Funding – ORL directed that June and July invoices be directed to the NIH project funding to expend the grant prior to project closeout.
- Staff time in September and October that is primarily devoted to Endline activities will be charged to the Midline account codes per agreement with ORL. The Endline account codes will likely not be available until the end of October, pending receipt of NIH funding.

Approved EDC Midline Work Scope Changes
Approved EDC Midline work scope changes are as follows:
- 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) was approved for updates to the self-scheduler work flow for the confirmation page
- January 24, 2022 $12,350 in estimated direct costs was approved 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 continued to keep laptops and phones, and one phone remained in the SSL.
- Jan 24, 2022 – Interviewer training was delayed by two weeks.
- The project conducted one virtual attrition training for nine experienced field interviewers.
- April 14, 2022 - A revision to the Self Scheduler was approved to allow different tracks for SSL versus Field scheduling $5,623 direct, $7,895 total cost.
- July, 2022 -- At the close of the data collection period, the research team requested an additional bonus of $100 per interviewer (a $150/interviewer bonus had previously been approved and paid to the data collection team). The additional bonuses were calculated and submitted for payment on August 6, 2022. 30 interviewers and 9 TLs who worked through June 30, 2022 on the Midline project were eligible for this additional bonus. Production Manager Barb Homburg sent an end-of-study email to interviewers noting the bonus and congratulating all on a successful data collection.

The internal SRO memo requesting the bonus payment noted:
The Special Payment Plan is at the request of the client, ORL, for the Every Dollar Counts-Midline Program Evaluation. The client requested this special payment for the following reasons;
1. To provide an additional reward to Team Leaders and Interviewers for going above and beyond compliance rate goals,
2. To prepare for Endline by getting the maximum number of interviewers to return to the project, and
3. The budget of Every Dollar Counts-Midline allows this extra payment.
- Staff working on EDC Endline will charge EDC Midline for September and October work, pending receipt of Endline funding and charge codes.

Special Issues

Cost
Nov 20, 2022

Total Cost to Date (Direct + Indirect):	1,645,445.78
Estimated Cost at Completion (E$AC):	1,647,146.99
Total Budget:	2,124,151.00
Variance (Budget minus E$AC):	477,004.01
Reason For Variance:	HPI was much lower than projected (3 hpi versus 5.5 projected) due to heavy respondent use of the self-scheduler.

Projections
Nov 20, 2022

Dollars Projected For Month:	50,157.68
Actual Dollars Used:	37,450.68
Variance (Projected minus Actual):	12,707.00
Reason For Variance:	The variance is due to a correction in indirect costs.

Measures

	Units Complete	RR	HPI
Current Goal:	2670	89%	5.5 Tel, 10.0 Field
Goal at Completion:	2670	89%	5.5
Current actual:	2900	.97	3.01
Estimate at Complete:	2900	.97	3.01
Variance:	230	.08	2.49

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	Oct, 2022 (EDC-SS Phases 3-4) **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	Production interviewing is quite slow this phase. We did just lose an interviewer - project was more challenging than she had anticipated. But overall, we are slower in getting Rs to set and keep appts. And HPI is a little higher, but it will will not impact costs substantially (updated costs assume this elevated HPI -- 7 versus 5 -- will stay as the average for the rest of this phase, but there are just not enough iws to have this be a major cost factor).
Special Issues	None

Cost
Nov 07, 2022

Total Cost to Date (Direct + Indirect):	231,921.55
Estimated Cost at Completion (E$AC):	320,326.22
Total Budget:	408,935.00
Variance (Budget minus E$AC):	88,608.78
Reason For Variance:	See previous months - this is only a slightly higher underrun than previously.

Projections
Nov 07, 2022

Dollars Projected For Month:	32,078.01
Actual Dollars Used:	22,395.79
Variance (Projected minus Actual):	9,682.22
Reason For Variance:	slower rate of interviewing

Measures

	Units Complete	RR	HPI
Current Goal:	122	95	5.0
Goal at Completion:	122	95%	5.0
Current actual:	46		7
Estimate at Complete:	122		7
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	Oct, 2022 (HCAP 2022)	**Project Phase**	Implementing
Risk Level	On Track		

Monthly Update   HCAP production has been underway for 18 weeks and is going well. The 2nd Iwer training was mid-Oct and we doubled the Iwer staff size. At training, one Iwer was terminated due to carelessness with his laptop, and 2 Iwers

resigned after training, both On-staffers. One on-staffer left training due to being very sick and was just cleared to start work from home. We will work to get her trained on administering interviews as her TL only lives one hour away. We will start her on doing Informant phone interviews from home since those are pretty straightforward (~20 minutes of questions about the R). Currently there are 30 Iwers, 4 TLs, a PC, and a PM. 1,277 interviews have been completed, including 706 R and 521 Inf.   There are currently 258 appts. The overall HPI is 4.66. It increased when new Iwers started working but we expect it to decrease gradually and end up between 4.0-4.3. The overall HPI will likely be lower than last wave as the interview is slightly smaller this wave due to not administering the smell test. Logging and data entry is underway. Brave Man & Logical Memory story recall forms are being data entered by Ann Arbor staff (SSAs) as well as the Letter Cancellation Forms. Brave Man forms are being double entered to start, and then one out of 10 will be double entered to check with errors. These are entered into a Blaise Stand-alone. Brave Man and Logical Memory will have additional QC since it is administered via paper and pencil. Ann Arbor staff will listen to the last 3 BM/LM administrations for ea Iwer while checking the form. Additional areas for training may be identified and this would be done via conference call or over a special Zoom training. We will do the same with Constructional Praxis. Standard QC has begun and systems (Blaise 4.8) are working smoothly with Olive now. Verification has finally started and is being done via paper and pencil due to delays in verification launch due to staffing issues and re-creating the verification system. The Spanish Iwer training was held on 10/15. A couple of translation issues were discovered in the Spanish materials are being fixed. Spanish interviews may begin next week. We are reviewing the budget due to an anticipated overrun due to several factors: a) budget cap when the budget was decided on prior to 2020 and Iwer hours were cut, b) the current budget was created prior to 2020 for an anticipated 2020 data collection that did not happen due to COVID – and has stretched for 2 years longer than anticipated with a lower level of activity, c) the sample size increased for 2022 but still under the budget for 2020 with a lower sample size, d) the 2020 budget did not account for a significant increase in travel costs, and various other increased costs such as duplicating and materials, e) Iwer rates have increased since pre-2020. We are documenting these factors that could lead to an overrun once costs are projected using accurate Iwer hours, and will share this with project staff so they are aware early on of a possible overrun.

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

Cost
Nov 20, 2022

Total Cost to Date (Direct + Indirect):	1,343,804.40
Estimated Cost at Completion (E$AC):	4,262,074.71
Total Budget:	4,488,000.00
Variance (Budget minus E$AC):	225,925.29
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
Nov 20, 2022

Dollars Projected For Month:	417,773.20
Actual Dollars Used:	246,011.70
Variance (Projected minus Actual):	171,761.50
Reason For Variance:	TOA costs are spread evenly across months and will be updated to reflect when they are actually sent.

Measures

	Units Complete	RR	HPI
Current Goal:	1176		
Goal at Completion:	7060	76%	
Current actual:	1227	15%	4.6
Estimate at Complete:		76%	
Variance:			

Other Measures	Goals and actuals include R + Inf iws.

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

Project Type	Sponsored Projects		**Project Status**	Current	

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

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

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

Proposal #:	no data

Description:

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

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

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

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

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

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

Milestone Dates

PreProduction Start: 03/01/2021	*Pretest 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	SRSvey2Trak, MSMSailer
Data Col Tool	NHAS 2021 Spring COVID Survey / Fall COVID Survey
Hardware	HRSe2021dPerspectives 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	Oct, 2022 (HRS 2021 OYMS / COVID S	**Project Phase**	Closing

Risk Level	*On Track*
Monthly Update	No changes following

[General]
The remaining monthly MPR updates will be quite minimal as effectively all activity on this project concluded in early-August, 2022, but costs will not be finalized until November, 2022 (following the voiding of checks for Release 2/Fall). The last MPR entry is expected to be in December, 2022.

[Production & Project Closeout Status]
A total of seven non-blank questionnaires have been delivered since data collection has ended; per protocol, these have been mailed to SRC-HRS for further processing, and these will not be reflected in production reports (finalized as of mid-August).

Special Issues	None.

Cost Nov 09, 2022		
Total Cost to Date (Direct + Indirect):	1,225,017.86
Estimated Cost at Completion (E$AC):	1,160,426.55
Total Budget:	1,333,924.00
Variance (Budget minus E$AC):	173,497.45
Reason For Variance:	[Unchanged from previous month.]

The EAC is currently lower than the total cost to date due to projected credits for unredeemed respondent payments / checks in the future (those for the Fall, 2021 release being voided in October, 2022). Remaining projections as of 11/22/2022 amount to a credit of $64,591.31

We are currently projecting an underrun of ~$173K. Primary drivers are: (1) Lower-than-budgeted RR from the Spring effort; (2) Lower-than-budgeted RR from the Fall effort; (3) $106K in unallocated budget.

Projections Nov 09, 2022		
Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
Reason For Variance:	No projections nor charges to the project in the month of October.

Measures

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

Other Measures

Final Non-Interview Rates (as of 8/12/2022 - Final)
```
                          n   |  %
NI, Final Refusal       |   608 | 3.11%
NI, Locating Exhausted |   531 | 2.72%
NI, Other              | 6,824 | 34.93%
NS                     |   493 | 2.46%
```

Units Completed & RR by Release (as of 8/12/2022 - Final):
```
          n, IW  |  RR
Spring  | 8,363 | 60.7%
Fall    | 3,211 | 55.8%
```

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

Principal Investigator/Client   David Weir (ISR-SRC)

Funding Agency

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

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

Proposal #:   no data

Description: 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:*	05/06/2023

Other Project Team Members: Derek Dubuque (Production Manager), Andrea Sims (Production Manager), Theresa Camello (Production Manager), Taghreid Lovell (Production Manager), Milagros Hierro (Production Manager), Deborah Zivan (Project Manager), Andrew Hupp (Project Manager), Gary Hein (Project Manager), Erin McSpadden (Project Manager), Daniah Buageila (Project Manager), Janet McBride (Project Assistant), Paul Burton (Stats/Sampling), Vanessa Clarke (Project Assistant), Jeannie Baker (Project Manager), Melissa Luker (Project Assistant), Anthony Romanowski (Project Manager), Megan Hromco (Project Assistant). Kristen Cross (Project Assistant)

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

Risk Level   *Attention!*

Monthly Update	Throughout the month of October, projections and actuals for both hours and completed interviews were closely in line. The project team has been working on production monitoring, logging, weekly mailings (SSA and SAQ), web panel sample releases, payment and letter request processing, and testing. The panel project team started work on preparing for a mid-February training for iwers who will be trained ONLY on the screening protocol in conjunction with the screening project team. The project team started the process for interviewer recruitment for the February and April trainings. Technical development has continued with the Blaise instrument, SurveyTrak, Weblog, WebTrak, and reports. Preparation for the next release of web panel data was started.

Special Issues

-Projected overrun which is not yet reflected in CRS (pending further discussion with Exec team)
-Concerns about finishing panel interviews by end of April due to current interviewer count and balancing effort with new cohort screening/baseline iws.
-Release time for web panel sample into MSMS.
-Multiple Blaise issues that have impacted STrak and MSMS throughout data collection.
-DIM design creating long sync times in DCA for field staff forcing them to work offline
-DCA crashing frequently for field staff (cause unknown)

Cost
Nov 07, 2022

Total Cost to Date (Direct + Indirect):	10,597,041.92
Estimated Cost at Completion (E$AC):	16,345,611.39
Total Budget:	16,508,390.00
Variance (Budget minus E$AC):	162,778.61
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, increased mileage costs for remaining interviews, and the Field Iwer and SurveyTech rate increases have been updated in CRS.

Projections
Nov 07, 2022

Dollars Projected For Month:	943,329.77
Actual Dollars Used:	594,457.33
Variance (Projected minus Actual):	348,872.44
Reason For Variance:	October salary costs were significantly under projections for project management staff and interviewing staff. Non-salary costs were also under projections due to unused respondent payments and travel costs. Respondent payments and travel costs were pushed forward to future months.

Measures

	Units Complete	RR	HPI
Current Goal:	8,774	41.0%	12.0
Goal at Completion:	16266	74.0%	9.0
Current actual:	8,667	40.5%	8.85
Estimate at Complete:	16266	74.0%	9.0
Variance:	0	0	0

Other Measures

Web Panel as of 11/16/22: 560 interviews (35%)

Project Name	(HRS HOC) Health and Retirement Study – Historical Occupation Coding
Project Mode	Primary: Data Processing
Project Type	Sponsored Projects

Project Status Current

Budget	*Direct Budget:*	59,564.25	*InDirect Budget:*	21,442.65	*Total Budget:* 81,006.90

Principal Investigator/Client
David Weir (SRC)
Amanda Sonnega (SRC)

Funding Agency NIA

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

Project Team
Project Lead: Gloria J Baker
Budget Analyst: Cindy Tsao
Production Manager: Stanley W Hasper
Senior Project Advisor: Jennifer C Arrieta
Production Manager:
Production Manager:

Proposal #: no data

Description: HRS Staff will provide SRO with the text description of approximately 10,000 occupations reported in interviews completed during 1994-2002 waves of data collection. The Survey Services Laboratory (SSL) will complete occupation re-coding for jobs reported during the 1994-2002 waves of HRS data collection, using 2010 Census codes. Coding for these occupations was completed in the past using 1980 Census codes.

SRO Project Period 09/2022 - 12/2023
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: HRS Historical Coding
Sample Mgmt Sys NA
Data Col Tool NA
Hardware Desktop
DE Software Other (Coding Application)
QC Recording Tool NA
Incentive Not used
  Administration N/A
  Payment Type N/A
  Payment Method N/A

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Report Period	Oct, 2022 (HRS HOC)	**Project Phase**	Planning

Risk Level   *Some Concerns*

Monthly Update During the month of October, Stan and Jen met with the PIs to discuss work scope, delaying the start of the the original work scope, and the additional work scope needed to create a crosswalk between the original census codes used and the 2010 census codes. The PIs approved the cost for the additional work scope which has since been added to the SRO budget. Stan worked on the crosswalk while the project manager and budget analyst worked on cost projections.

Special Issues
- Additional work scope for crosswalk work
- Delay of original work scope to now begin in Spring 2023
- PI with the most coding experience/knowledge left the organization shortly after start of project

Cost
Nov 15, 2022

Total Cost to Date (Direct + Indirect):	8,494.83
Estimated Cost at Completion (E$AC):	78,777.41
Total Budget:	81,006.90
Variance (Budget minus E$AC):	2,229.49
Reason For Variance:	Variance due to salaries of assigned staff.

Projections
Nov 15, 2022

Dollars Projected For Month:	6,548.60
Actual Dollars Used:	8,494.83
Variance (Projected minus Actual):	-1,946.23
Reason For Variance:	Additional workscope for crosswalk work originally estimated for 80 hours but took 104 hours in total (23 of which were charged in October - remaining will be charged in November)

Measures

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

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 Oct, 2022 (HRS2022-Screening) **Project Phase** Implementing

Risk Level *Some Concerns*

Monthly Update The 12-week mark for a large portion of release 2 has occurred. This is the time point at which the remaining cases that haven't been eligible for the protocol due to effort (10+ attempts), or other reasons (resistance, safety, locked, etc.). The release 2 cases will be worked until the end of January (there 24-week mark). New cases are pulled each Monday and are reviewed and placed into their follow-up protocol days later. Release 3 cases are meeting criteria for the follow-up protocol.

A document detailing the follow-up procedure can be found here.
https://docs.google.com/spreadsheets/d/1aPZW0VSaYxJXAxJAr1okgYAHR1_vWyDhEj-lqvDnxro/edit#gid=0

We continue to suffer from a lack of resources and the effort being put forth. In October we had between 66%-97% of interviewers making screening attempts. 69.4%% of interviewers who charged time made attempts. Screening interviewers during that period worked ~7.9 hours per week.

The next training (February) has the goal of recruiting 40 people to exclusively do screening. A larger training of at least 100 is planned for April.

Andrew and Eva presented the PIs with an update on screening and panel progress and discussed how the focus needs to shift primarily to panel. Current projections have panel finishing in July '23 if no changes are made. Screening is being reduced to to working two call windows (with a further possible reduction to one call window) to push focus to panel sample. The screening sample is being consolidated (where there are multiple interviewers in a PSU). Theresa and Millie will have work with those with screening sample, freeing up the TLs to focus their work on panel.

IRB: No IRB amendments are currently planned.

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

Andrew met with DMSS to discuss the result codes and rates. Andrew was reviewing the SurveyTrak and reporting specs and discovered the project was using some result codes incorrectly. Andrew and Raphael worked out the result code issue. There will be an additional discussion about the rates on the FPR.

Special Issues

Cost

Total Cost to Date (Direct + Indirect):	6,314,292.85
Estimated Cost at Completion (E$AC):	25,899,171.94
Total Budget:	24,277,856.00
Variance (Budget minus E$AC):	-1,621,315.94
Reason For Variance:	Updating projections to be more in line with actuals from the field.

Projections

Dollars Projected For Month:	1,169,196.91
Actual Dollars Used:	882,126.79
Variance (Projected minus Actual):	287,070.12
Reason For Variance:	--Staff hours in August were lower than projections by ~23% (~$133,000).

Measures

	Units Complete	RR	HPI
Current Goal:	3,600/1,500 HHs	73%	3.0
Goal at Completion:			
Current actual:	642/667	27.0%	3.79
Estimate at Complete:			
Variance:			

Other Measures

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

Project Type	Sponsored Projects	**Project Status**	Current

Budget	*Direct Budget:* 358,900.61	*InDirect Budget:* 200,983.92	*Total Budget:* 559,884.53

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

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

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

Project Team
Project Lead:	Sarah Elisa Broumand
Budget Analyst:	Ryan Neice
Production Manager:	
Senior Project Advisor:	Stephanie A Chardoul
Production Manager:	Sarah Elisa Broumand
Production Manager:	Sarah Elisa Broumand

Proposal #: no data

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

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

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)
Sarah Broumand - 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	Oct, 2022 (IHDS3) **Project Phase** Implementing
Risk Level	*Some Concerns*

Monthly Update

Continue working on finalizing Bengali translations.   Concern continues because clients continue to make translation changes expending hours from the SRO team. October. We had to recruit a new programmer to help cover the load of work with these translations. Also, there was an unexpected increase of merge and migrations due to the number of data models released to productions and revisions done after data models were put in production.

As a result of this, we have a higher overrun.

To mitigate these 2 issues we are doing the following:
1. NCAER Blaise programmers are starting to help entering the translation text into the smaller data models. That was successful and now we have given them one of the larger Community data models.
2. We are planning on training the NCAER team to perform some of the merge migration work required on this project so we can reduce Data Manager support in SRO. The plan will be they will inform us of any issues with the merge/migration and we will only take care of those.

We continue to have ST errors either launching, or finalizing lines, but still in very small numbers that seem to indicate laptop issues rather than programming issues. We implemented a new Feature in FUM that will allow our users to reset lines that have not been finalized. This will allow the NCAER team to work more independently moving forward.

Special Issues

Cost
Nov 20, 2022

Total Cost to Date (Direct + Indirect):	476,450.90
Estimated Cost at Completion (E$AC):	574,355.36
Total Budget:	559,884.53
Variance (Budget minus E$AC):	-14,470.83
Reason For Variance:	on track with the budget

Projections
Nov 20, 2022

Dollars Projected For Month:	16,755.04
Actual Dollars Used:	12,648.76
Variance (Projected minus Actual):	4,106.28
Reason For Variance:	no reasons, conserving as much time as possible.

Measures

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

Other Measures

Project Name	(MI CReSS (Year 2)) Michigan COVID-19 Recovery Surveillance Cohort Study
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 341,017.00 **InDirect Budget:** 88,663.00 **Total Budget:** 429,680.00
Principal Investigator/Client	
Funding Agency	
IRB	**HUM#:** HUM00181068 **Period Of Approval:** Exempt
Project Team	**Project Lead:** Sarah Elisa Broumand
	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

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

Risk Level *On Track*

Monthly Update Sample replicate 9 was released on October 12 as planned. Production continues as planned. This month required additional meetings to transfer project management activities from Terri R to Sarah B.

Special Issues

Cost
Nov 20, 2022

Total Cost to Date (Direct + Indirect):	15,103.88
Estimated Cost at Completion (E$AC):	383,884.79
Total Budget:	429,680.00
Variance (Budget minus E$AC):	6,479.21
Reason For Variance:	The budget reflected here is for Y2, it is actually $390,364.00 for Y3 that started October 1.

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
Nov 20, 2022

Dollars Projected For Month:	47,161.23
Actual Dollars Used:	15,103.88
Variance (Projected minus Actual):	32,057.35
Reason For Variance:	Terri R transitioned out of the Project Management role and Sarah B still figuring out how many hours of project management will be needed. The other source of the variance was due to the fact that shortcodes for Y3 were not released on time and some timesheets were still using Y2 shortcodes. Hours were carried over to the next months projections to account for these.

Measures

	Units Complete	RR	HPI
Current Goal:	3,225 (Rel 1-10)	80% (60%-Web/40%Tel)	2.25
Goal at Completion:		80% (60%-Web/40%Tel)	
Current actual:	2,628	69% (67%-Web/33% Tel	4.28
Estimate at Complete:			
Variance:			

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

2689   Y2 Sample
2152   80% RR Rate

1292   60% Web
860 40% Phone

2.25   HPI Telephone
0.25   HPI Web Reminder

Project Name	(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027
Project Mode	Primary: Class SAQ Total of Modes: 1
Project Type	Sponsored Projects

Project Status Current

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

Principal Investigator/Client Richard Miech (SRC)

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

IRB *HUM#:* 00217920 *Period Of Approval:* from 7/20/22 No CR

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

Proposal #: no data

Description: 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	Oct, 2022 (MTF Base Year 2022_27)	**Project Phase** Implementing
Risk Level	On Track	

Monthly Update

October 2022
- review protocols for 2023 - update System specs. necessary for 2023 and make updates to training materials, agendas etc.
- work began to decommission ~6,400 tablets ready to be sent to UM property dispo. (these are being replaced by a smaller number of new tablets).
- interviewer posting closed and staffing plans being reviewed

Special Issues

Cost
Nov 20, 2022

Total Cost to Date (Direct + Indirect):	670,144.46
Estimated Cost at Completion (E$AC):	8,925,413.18
Total Budget:	9,778,060.00
Variance (Budget minus E$AC):	852,646.82
Reason For Variance:	Since the cost report was run I have updated projections for the five year funding period - and also carefully reviewed projections for 2023. The latest underspend is $852,646.82

Projections
Nov 20, 2022

Dollars Projected For Month:	371,609.15
Actual Dollars Used:	255,700.26
Variance (Projected minus Actual):	115,908.89
Reason For Variance:	Variance mostly on non-salary costs because tablets cost around ~$40k less than estimate.

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	Oct, 2022 (MTF HID 22)

Project Phase   Closing

Risk Level	*On Track*
Monthly Update	Management:

- Final data delivery is complete
- Continue to work on close-out activities (Documenting HID Web SMS and final report)

Technical system:
- N/A

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

Special Issues

Cost
Oct 31, 2022

Total Cost to Date (Direct + Indirect):	336,596.25
Estimated Cost at Completion (E$AC):	345,745.48
Total Budget:	468,982.00
Variance (Budget minus E$AC):	123,236.52
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 October,2022.

Projections
Oct 31, 2022

Dollars Projected For Month:	4,266.72
Actual Dollars Used:	4,116.15
Variance (Projected minus Actual):	150.57
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 October 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	Oct, 2022 (MTF Panel 2022-27) **Project Phase** Implementing
Risk Level	On Track
Monthly Update	Management

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

- continue to work on documentation
-started to prepare next wave of data collection

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

Data Collection
- Production started in April 2022
As of 09/30/2022: Total Sample: 17708.
Total Web completes=8077 (45.61%)
Note: Comparing to the last wave in the same production period, the RR is similar as previous wave.

Special Issues

Cost
Oct 31, 2022

Total Cost to Date (Direct + Indirect):	528,240.16
Estimated Cost at Completion (E$AC):	3,990,629.16
Total Budget:	3,895,217.00
Variance (Budget minus E$AC):	-95,412.16
Reason For Variance:	The total project amount includes MTF Web Illume as well as Non-Response Calling and Winter Location project. The overrun amount is MTF Panel 2022-2027 that was the combination of MTF Panel 2017-2022 and MTF Web Illume. SurveyTech charges were higher than projected. Some other charges are questionable and are being investigated. Project team will revisit and streamline projections for future months.

Projections
Oct 31, 2022

Dollars Projected For Month:	27,985.32
Actual Dollars Used:	41,895.60
Variance (Projected minus Actual):	-13,910.28
Reason For Variance:	The total project amount includes MTF Web Illume as well as Non-Response Calling and Winter Location project. The overrun amount is MTF Panel 2022-2027 that was the combination of MTF Panel 2017-2022 and MTF Web Illume. SurveyTech charges were higher than projected. Some other charges are questionable and are being investigated. Project team will revisit and streamline projections for future months.

Measures

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

Other Measures

Project Name	(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)

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Report Period	Oct, 2022 (PSID23 Online Contact Upd: **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	PSID delivered TAS sample on 9/30 and Core Batch 2 sample on 10/5. TAS sample was loaded and released in MSMS on 10/5. Core Batch 2 sample was loaded and released in MSMS on 10/10.

PCM mailed the first 100 postcards to batch 2 sample on 10/13 -- all of batch 2 postcards were mailed by 10/19.

On 10/17, I noticed there were still no web completes and asked the tech team to investigate. The tech team determined that there were 6 Blaise completes from Batch 2 sample, but no 1001s were appearing in MSMS. Jim determined that the batch 2 cases didn't have a value for InstrumentPrimaryKey, and was able to quickly implement a fix the same day.

Revised email templates were programmed and testing began. Email reminder scheduled to be sent first week of November.

Production Update: 108 web completes total in Oct -- 91 completes after postcards mailed on 10/13.
--24 Core Batch 1 completes
-- 4 Core Batch 2 completes
--80 TAS Batch 2 completes

Special Issues

Cost
Nov 11, 2022

Total Cost to Date (Direct + Indirect):	42,684.18
Estimated Cost at Completion (E$AC):	45,943.37
Total Budget:	47,456.00
Variance (Budget minus E$AC):	1,512.63
Reason For Variance:	Removed future projections for Karl and Jim -- hours had been set aside to correct CS reset process, but due to resource constraints and short project timeline this work has been deprioritized.

Projections
Nov 11, 2022

Dollars Projected For Month:	4,065.47
Actual Dollars Used:	1,719.74
Variance (Projected minus Actual):	2,345.73
Reason For Variance:	Email programming took less time than expected. Hours correction projected in November hit in October (29 HD hours incorrectly charged to project in Aug-Sept were credited in Oct).

Measures

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

Other Measures

Project Name	(PSID23) Panel Study of Income Dynamics Core 2023
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 5,030,748.00 **InDirect Budget:** 0.00 **Total Budget:** 5,030,748.00
Principal Investigator/Client	Katherine McGonagle (UM-SRC-PSID) Narayan Sastry (UM-SRC-PSID) Esther Friedman (UM-SRC-PSID)
Funding Agency	
IRB	**HUM#:** HUM00062417 **Period Of Approval:** 3/22/22-3/21/23
Project Team	**Project Lead:** Rachel Anne Orlowski **Budget Analyst:** Ivanna Iavorska-Em **Production Manager:** Stacy Quisenberry **Senior Project Advisor:** Stephanie A Chardoul **Production Manager:** Daric Thorne **Production Manager:** Shonda R Kruger-Ndiaye
Proposal #:	no data
Description:	The Panel Study of Income Dynamics (PSID--also known to Respondents as the Family Economics Study or FES) is a longitudinal survey of several thousand individuals and their families, carried out since 1968 and conducted every two years. The sample is comprised of respondents from the 4,800 original families as well as new (immigrant) sample added in 1997/1999 and 2017/2019. The total 2023 sample size will be approx. 11,200, with approx. 9,650 completed interviews expected. Most of the information collected is about family composition and changes (marriages, divorces, births, deaths, people moving in and out); income sources and amounts; employment and pensions; and wealth. There are also questions about housing; education; vehicles; health; fertility; COVID-19; and money spent on food, healthcare, and school. The main focus is on how these family composition and financial factors interact with each other and how they change over time. The survey will be administered via web and telephone, with the expectation that more surveys will be completed via web than telephone (which will be a first for the study). During the 2023 wave, saliva samples will be collected for the first time on PSID Core. The Core interview must be completed to be eligible for saliva collection. Saliva sample participants that are eligible for collection during Core are adults related to Child Development Supplement (CDS) children but do not live with them. Interviewers will be trained on both the interview and saliva collection protocols. Both data collection efforts will be managed in the same MSMS project. The saliva collection effort has its own proposal number, budget, and MPR entry. The 2023 waves of CDS and the Transition into Adulthood (TAS) will follow PSID Core data collection. CDS and TAS eligibility is dependent upon completion of PSID Core.
SRO Project Period **Data Col Period** **Security Plan**	03/2022 - 03/2024 03/2013 - 12/2023 NA

Milestone Dates

PreProduction Start:	03/01/2022	**Pretest Start:**	10/03/2022
Pretest End:	10/24/2022	**Recruitment Start:**	09/19/2022
Staffing Completed:		**GIT Start:**	
SS Train Start:		**SS Train End:**	
DC Start:	03/01/2023	**DC End:**	12/31/2023

Other Project Team Members:

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

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Report Period	Oct, 2022 (PSID23)	**Project Phase**	Implementing
Risk Level	*Some Concerns*		

Monthly Update

Pretest data collection, 10/11 -10/31:
Launch was delayed as technical systems were not ready. Rescheduled remote training - occurred 9/30, 10/4, & 10/5. Did not test as thoroughly as we should have in order not to delay further. Iwers reported a DCA/preload issue with PersonType that we were able to address by loading a new variable and programming the DCA to display it. Tech team discovered FPS (field properties) data were missing in the 5.8 compiled write interceptor; replaced it with a 5.10 compiled write interceptor, which corrected the issue. Completed 100 interviews - met goal of completing 90-100 iws from 113 respondents. 50 web iws, 46 CATI iws, and 4 mixed mode iws. Held debriefing with PIs and project staff on 10/27; received a lot of helpful feedback and an overall positive review of the DCA improvements.

Pretest performance test:
Initially delayed as the MSMS Core Development Team did not have the "data load" ready. Then tech team decided to delay further in order to prioritize pre-production development. Decided to compare current 2023 project (with all available sync updates) to 2021 project. Now scheduled to start on 12/15.

MSMS core development:
NAPE updates are needed to spec/test project set-up; used a workaround for Pretest. Email/text workflow improvements are dependent upon this work's completion. Currently, on track to be released in time for inclusion in PSID 2023 pre-production development.

Production technical development:
Lead managers worked with tech leads to evaluate pre-production development timeline and priorities. Added more time for testing and correcting identified issues. Continued training new MSMS set-up programmers. Added new Special Offer and letters processes to MSMS. Designed how verification of CATI iws and FTF saliva collection can occur in the same MSMS project. Continued English Blaise fixes and started Spanish Blaise CATI programming. Worked on Team Locating within the 68ID Site - not programmed in time to be tested by Pretest Interviewers.

Saliva component:
Adjusted management plan due to Terri Ridenour's departure and tried to increase activity with available staff. In need of additional PDMG staff. Continued working with PIs to finalize the scope in order to finish the re-budget. Continued work on the saliva sample management system and report designs, as well as the operationalization of the protocol.

Production staffing:
On-staff recruitment posting was available 9/19 through 10/9. DCO PMs continued discussing sharing possibilities with other projects; interviewer staffing plan not yet finalized in October. Unable to staff as many field leaders as budgeted; plan to post again. PIs approved paying PSID21-experienced field leaders a $2 differential for their PSID and MSMS expertise as well as proven leadership as they will have larger, less experienced teams and new protocols this wave (saliva collection and Spanish web iwing).

Production training:
Began meeting regularly with training team. Reviewed 2021 training materials and determined what is needed for 2023. Planning for three trainings: T1 remote in February with on-staffers; T2 in person in April with new hires; T3 remote in June with on-staffers.

Special Issues   Unable to develop as much as expected for Pretest. More development now planned between Pretest and Production. Pretest was pushed back--shortening the development timeline between Pretest and Production.

Unable to staff as many on-staff interviewer hours as budgeted -- planning for many shared agreements. Need more new hires than anticipated, which has a sizable negative impact on the budget and proposes a risk to data collection.

Cost
Nov 17, 2022

Total Cost to Date (Direct + Indirect):	378,863.56
Estimated Cost at Completion (E$AC):	5,273,022.16
Total Budget:	5,030,748.00
Variance (Budget minus E$AC):	-242,274.16
Reason For Variance:	Primarily driven by assigned vs. budgeted resources due to staff departures; adding TL involvement in pre-production; increasing the Iwer II and Iwer III rates; increasing programmer hours; merit increase above 3%; and staffing/training more interviewers (including more new hires) than budgeted.

Note: Unable to separate Core IDC costs from Contact Update IDC costs. Cost values only reflect Direct Costs.

Projections
Nov 17, 2022

Dollars Projected For Month:	184,060.02
Actual Dollars Used:	144,314.93
Variance (Projected minus Actual):	39,745.09
Reason For Variance:	Mainly due to TSG, DMSS, and DCO (management, recruitment, and field iwing staff) charging fewer hours than projected.

Note: Unable to separate Core IDC costs from Contact Update IDC costs. Cost values only reflect Direct Costs.

Measures

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

Other Measures   BUDGET ASSUMPTIONS:
Mode of completion: 60% web & 40% CATI; Of the web completes, 38% do not require any interviewer effort.
HPI: 5.42 = CATI completes; 7.21 = web completes w/ interviewer follow-up; 10.17 = non-sample/non-iw. Additional 1.74 HPI for FTF NRFU cases.

Project Name	(PSID-PR) Puerto Rico Panel Study of Income Dynamics
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects **Project Status** Current
Budget	**Direct Budget:** 828,581.00 **InDirect Budget:** 464,004.00 **Total Budget:** 1,292,585.00
Principal Investigator/Client	Narayan Sastry (University of Michigan) Elizabeth Fussel (Brown University)
Funding Agency	NICHD, with supplemental funding being sought from NIA
IRB	**HUM#:** HUM00197300 **Period Of Approval:** 4/5/2022-4/4/2023

Project Team
Project Lead:	Shonda R Kruger-Ndiaye
Budget Analyst:	Ivanna Iavorska-Em
Production Manager:	
Senior Project Advisor:	Stephanie A Chardoul
Production Manager:	Camila Kendall
Production Manager:	

Proposal #:   no data

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

SRO Project Period	01/2022 - 12/2023
Data Col Period	
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:	Marsha Skoman--Tech Lead Raphael Nishimura--Sampling
Other Project Names:	
Sample Mgmt Sys	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop
DE Software	N/A
QC Recording Tool	Camtasia
Incentive	Yes, R; Yes, INF
Administration	Other (ETI (Puerto Rican Survey Firm))
Payment Type	Check, post (Varies by study phase); Cash, post (Varies by study phase)
Payment Method	Other (Via ETI Systems)

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Report Period	Oct, 2022 (PSID-PR) **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	SRO prepared for listing training, which took place 10/14-10/16. Laptops were shipped overnight on 10/10. However, on 10/11 project was notified that the laptops were being held until additional documentation was provided (EIN-Tax ID number, Schedule B, POA, License, License Exception or

License Exemption). Mike worked with the UPS rep and laptops were released and arrived in PR on 10/13. Laptops were delivered to UPR on 10/14. TSG prepared 8 additional training laptops that were brought as carry on luggage, in case the laptops didn't arrive in time.

Listing training went well. 26 UPR students were trained on listing procedures. The students were enthusiastic and we were able to complete all of the training content within the allotted timeframe. Listing sample was transferred to supervisors on 10/20. Listing production began 10/22. Completed 51 blocks the first weekend of production. At current pace, do not anticipate that listing effort will be completed by Dec 23 (last day students can work in 2022).

SRO and PI met in person with ETI on 10/17 -- discussed organizational structures and pretest planning.
SRO and PI met in person with collaborators from the Center for New Economy on 10/18. These collaborators have experience working with ETI and are advising Narayan on working in PR.

Field Maps: Discovered that the points added during the training had been loaded into the Production project. DMSS was able to use the time/date stamp to identify training points and remove them from the project. Listers reported that they were unable to access the Online Field Maps project in some urban segments - PR PIs requested that DMSS prepare offline Maps. Field Maps has a limitation -- each project can only contain 16 offline maps. Thus, DMSS will create separate projects for each region.

SRO and PIs coordinating on translation planning. Translation scope was significantly underestimated -- in additional to all of the training materials, project is working to coordinate translations for additional instrument content for PR (IWER instructions, QXQs, SMS labels, etc.).

PSID PR and Core coordinating on how to operationalize programming across both projects in the most efficient way. SRO is exploring the idea of incorporating the PSID PR instrument into the Core instruments. Karl outlined the potential for gains in efficiency both in the initial programming effort and for bug fixes.

Special Issues	Work scope for Spanish translations was underbudgeted (U-M, non-SRO budget). Complexity of developing PSID PR and PSID Core instruments simultaneously -- will need decision on whether to incorporate PSID PR instrument into the Core instrument soon.
Cost **Nov 20, 2022**	

Total Cost to Date (Direct + Indirect):	146,686.64
Estimated Cost at Completion (E$AC):	1,313,512.26
Total Budget:	1,292,585.00
Variance (Budget minus E$AC):	-20,927.26
Reason For Variance:	Final overrun decreased slightly after updating TSG projections. Anticipate that the overrun will be eliminated as future projections are reviewed.

Projections
Nov 20, 2022

Dollars Projected For Month:	55,876.82
Actual Dollars Used:	31,808.08
Variance (Projected minus Actual):	24,068.74
Reason For Variance:	Slight decrease to projected overrun due to lower app programmer's hours. Blaise programming has not yet begun as projected.

Measures

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

Other Measures

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

			Project Status	Current

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

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

Funding Agency

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

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

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

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

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

- -

Report Period	Oct, 2022 (SCA 2022)	**Project Phase**	Implementing
Risk Level	On Track		
Monthly Update	SCA OCT22 began as scheduled on WED September 28, and ended as scheduled on MON October 24. We completed 600 (320/180/100) IWs for the month (meeting the monthly goals) - at a cumulative HPI of 2.96 (0.04 below the budgeted goal of 3.0).		

Special Issues

Cost
Nov 20, 2022

Total Cost to Date (Direct + Indirect):	992,673.16
Estimated Cost at Completion (E$AC):	1,217,220.32
Total Budget:	1,251,758.00
Variance (Budget minus E$AC):	34,537.68
Reason For Variance:	Lower than budgeted training costs, and HPI.

Projections
Nov 20, 2022

Dollars Projected For Month:	114,801.42
Actual Dollars Used:	105,971.34
Variance (Projected minus Actual):	8,830.08
Reason For Variance:	Lower than budgeted HPI.

Measures

	Units Complete	RR	HPI
Current Goal:	600		3.0
Goal at Completion:	600		3.0
Current actual:	600		2.96
Estimate at Complete:	600		2.96
Variance:			-.04

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	Oct, 2022 (SCIP 2021)

Project Phase Closing

Risk Level	*On Track*
Monthly Update	There was no activity on this project last month. Leftover funds will be returned.
Special Issues	

Cost
Nov 20, 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
Nov 20, 2022

Dollars Projected For Month:	0.00
Actual Dollars Used:	0.00
Variance (Projected minus Actual):	0.00
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:	04/01/2022	**Pretest Start:**	
Pretest End:		**Recruitment Start:**	07/23/2022
Staffing Completed:	10/01/2022	**GIT Start:**	
SS Train Start:	11/14/2022	**SS Train End:**	11/17/2022
DC Start:	11/07/2022	**DC End:**	04/15/2024

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

Monthly Update

Project Management and Planning:
- We sent weekly production updates to the PIs, and reported on progress on the call with the Army/M&RA.
- Meredith created the agenda/notes and facilitated the weekly meeting with the STARRS project managers.
- We carried out bi-weekly meetings with M&RA to coordinate Safety Plan and respondent locating activities.
- We awaited a response from the GSC to the research team's October 3 response memo regarding adding the biosample flags, administrative variables and inventory document to the ICPSR public holdings. We understand that the research team will not carry out the work until the funding is received, but U-M can start on the IRB submission in the new year.
- Year 3 subaward:
  o Staff continued to move July and August hours from the SRO overhead (contingency) account to the Year 3 accounts. Our financial analyst identified non-salary charges that required journal entries in order to be moved to Year 3 accounts.
  o We are able to report on updated costs beginning with the September cost report provided in this monthly report. However, we will not be able to accurately report on updated costs until all of contingency charges have been moved; we continue to monitor to be sure all charges are transferred in as timely a manner as possible.
- Plans for STARRS beyond Wave 4.
  o We held meetings about scope and timeline for the new ballpark of the 2017 "STARRS-LS Sample Refresher Study" (17-0062 R01). We are targeting early December for having the budget completed.
- The HEARTH Qualitative Interviews budget was sent to Harvard on October 6. During the month, we also responded to requests for a budget with an updated start date and for a different Letter of Intent format.
- IRB:
  o The amendment (#12) containing small changes to the Wave 4 survey was approved by the USUHS IRB on October 4.
  o The ORIO for the token of appreciation mailing protocol deviation was acknowledged by the USUHS IRB on October 4.
  o Amendment (#13), which includes the newsletter and the addition of the 988 Suicide and Crisis Lifeline number, was submitted to the U-M IRB on October 3 and approved on October 11. The USUHS IRB provided concurrence on October 27.
  o The Certificate of Confidentiality was due to expire at the end of December 2022. We completed the steps for renewal which included submitting an application to the U-M Human Rights Protection Program. After their review, we completed the CoC application in the NIH online system. The CoC renewal was approved/issued on October 26. We will add the CoC to the IRB protocol at the next amendment.

Enclave and User Support:
- Annual Security Controls Review: Our Enclave security lead coordinated with M&RA to transfer two outstanding findings from U-M vulnerability scans documented on our 2021 review, which we had an established plan with AAG to remediate. We also awaited word from M&RA on when the 2022 review will be scheduled.
- Annual Security Training Renewal 2023: The Enclave security coordinator reached out to M&RA to inquire whether there will be changes to the requirements. M&RA indicated there will not be any changes this year.
- We continued work on the annual NDI data. Our target delivery date for final data is late January 2023.
- Standard Enclave activities continued. These include maintaining security requirements; processing background checks and Great Lakes Cluster user access requests, drop box requests, ID swap and data transfer requests; managing software acquisition and updates; and providing user support as needed. Of particular note this month:
  o We continued work to define a request from Dr. Ursano for counts of blood samples by survey data collection

(i.e. AAS, NSS, PPDS, SHOS-A, LS1, LS2) for the Army STARRS participants, the STARRS-LS cohort and respondents with data at ICPSR.

o   We assisted Harvard analysts with notifications they had received related to the expiration of their U-M sponsored accounts.

o   We responded to a USUHS researcher's request for information about the availability of NDI data on the U-M Enclave for SHOS-B cases.

☐   There were no biomarker group requests needing assistance in October.

Public Use Data:

☐   The ICPSR quarterly report was sent to USUHS on October 22.

☐   Budget for the ICPSR-related activities - biosample flags, admin variables, and inventory document: See the Project Management and Planning section.

☐   We awaited decisions from the Army/GSC on producing the genetic and bioassay files for public use and placing data in the NIH National Data Archive and Public use release for GWAS.

Wave 3 Progress and Updates:

☐   Wave 3 data collection was completed on Monday, October 17, 2022. The HIPAA consent reminder phase continued for a few cases through October 26.

o   The final production numbers from our live monitoring reporting system were 11,089 completed interviews (10,128 web, 961 phone). The final number of completed interviews to be used in analysis will be determined after U-M and Harvard complete reconciliation steps.

o   The final Replicate 14 response rate was 74.5%. The final response rate for completed replicates (1-14) was 76.7%.

Safety Plan Results:

☐   The final safety plan rate was 11.8%. Of the 11,714 individuals that started the interview, 1,386 safety plan cases were followed up (1,069 by U-M and 317 by the Army)

Wave 4 Planning and Progress:

☐   The technical team met multiple times per week to ensure smooth coordination as we moved closer to launch of Wave 4.

☐   After four weeks of integration testing, the team signed off on the functionality of the various pieces that need to come together to form the technical systems for data collection:

o   Instruments – Main, Consent Supplement, Interviewer Observations

o   Consent generator application (used for respondents to access a PDF copy of their HIPAA consents)

o   Sample management system

o   Login page for web survey

☐   Production project setup of the above pieces began on October 26. Configuration testing of the production system started on October 27 and continued through the end of the month.

☐   We continued work on the sample preload, reporting systems, and a few other items needed for the CATI launch in early December.

☐   Team leader training was held October 26, 27 and 31.

☐   We continued work on interviewer training manuals, training videos, home study materials, training agendas and presentations.

☐   We coordinated with M&RA about a safety plan meeting with the Chaplains to be held in early November.

☐   Options for the best method for sending the newsletter were explored. Paul and Jeff T helped Meredith get in touch with the HJF designer who created the PDF version to see if he had graphics materials that could be used as email content. Meredith also consulted with one of our SRO programmers. We want to avoid attachments and links given both can lead to messages being flagged as spam. After exploring multiple options, we concluded that redesigning the newsletter in HTML email format would be the best option. The email delivery software that SRO uses generates desktop and mobile friendly layouts. We carried out work on the design (keeping it as close as possible to the original PDF) and worked through issues related to email content and deliverability best practices. In addition, the sample file was created and reviewed for email addresses needing clean-up.

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

☐   Throughout Wave 3, we received more anecdotal reports of respondents saying the token of appreciation isn't enough to make participation in the survey worth their while. Some are individuals who received $100 last time, and are still in phases offering $50. For others, the dollars are not enough for the time involved. We are mindful that Wave 4 response rates may be negatively affected by respondents' experience with the longer Wave 3 survey. If the first few replicates of Wave 4 yield lower than expected response rates, we may propose implementing an incentive experiment of, most likely, $75 and $150 dollars for approximately three replicates. We will want to explore whether an incentive increase is merited (especially if there are further waves of data collection).

☐   To date, our projected costs for Waves 3 and 4 have been higher than anticipated. Contributions to increased cost estimates included a longer survey instrument time for CATI and associated costs for recruiting and interviewing respondents, increased hours for programming instrument changes, and an increase in SRO interviewer base pay rates due to higher than expected inflation. The projected overrun has decreased in recent months due to lower than projected interviewer hours and reduced telephone charges due to a return to the physical telephone facility. The current Wave 4 projections assume an instrument length similar to that of Wave 3. If the Wave 4 survey involves longer CATI administration times, the Wave 4 production costs will increase. We will know more after having completed three or four Wave 4 replicates. In general, we continue to monitor the situation closely.

☐   Wave 3 Challenges

o   Wave 3 consent review and approval process – these risks were described in a September 30, 2020 memo to M&RA.

☐   The DHA Privacy Board has approved the DSA modification for the MHS HIPAA form; however, we will not receive any sort of VA prior approval. With the VA, we could be in a situation where we employ a VA HIPAA authorization form that ends up not being acceptable to the VA when it comes time to request health records data for linkage. While unlikely, it's also possible the approved MHS HIPAA form might not be acceptable to the providers of those data.

☐   The risk related to the VA not having reviewed the HIPAA form prior to production was highlighted in the June 15, 2021 GSC meeting when a question was raised as to whether the VHA HIPAA consent language would allow access to VBA data.

☐   Enclave Support

o   We continue to monitor priorities for Enclave support. We balance the primary Enclave support work with a number of more complex biomarker data support requests, which are outside of the reduced Enclave team scope in the STARRS-LS contract. We prioritize the primary work above other requests in accordance with project goals and to remain within budget/scope. As a result, the biomarker data support requests can take longer to service. As long as requestors are ok with this arrangement, we can continue to manage the work and priorities in this fashion.

☐   Scope additions

o   There are a few cost estimates for new scope that have yet to be made. 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
Sep 30, 2022

Total Cost to Date (Direct + Indirect):	5,765,665.68
Estimated Cost at Completion (E$AC):	12,874,819.85
Total Budget:	12,809,390.00
Variance (Budget minus E$AC):	-65,429.85
Reason For Variance:	We spent a total of $446,912 in September. That amount includes July and August costs that were moved from the SRO overhead account to the Year 3 accounts. While the bulk of the costs moved in September, there will be more in October and possibly November. Our projected deficit for the total five-year project decreased to $65,430 (from $96,502 in June), but it does not yet include all of the transfers. We will continue to review project expenses and update our projections based on realized costs and our experiences to date.

Projections
Sep 30, 2022

Dollars Projected For Month:	243,296.40
Actual Dollars Used:	446,911.83
Variance (Projected minus Actual):	-203,615.43
Reason For Variance:	The actual dollars amount includes July and August costs that were moved from the SRO overhead account to the Year 3 accounts.

Measures

	Units Complete	RR	HPI
Current Goal:		75	9
Goal at Completion:		75	9
Current actual:			
Estimate at Complete:			
Variance:			

Other Measures

	Units Complete	RR	HPI
Current Goal:		75	9
Goal at Completion:		75	9

Survey Research Operations

Monthly Project Report

Development Initiative and No Data Collection Projects

October 2022

Developmental Initiatives

TSME SRO SYS MAINTENANCE-GENERAL
TSME23-DCO Tech System Support 2023
PIPPA 2.0 FY23
TSME23-QC Systems
TSME23-Self-Scheduling Interface for MSMS

Developmental/Initiative Projects Dashboard

NonArchived Development Initiative and No-DataCol Projects

Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
TSME SRO SYS MAINTENANCE-GENERAL(483910)	Initiatives	Implementing	Jeffrey L Smith	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢
TSME23 DCO Tech System Support FY2023	Initiatives	Implementing	Vivienne Y Outlaw	☐	☐	☐	☐	☐	☐	🟢	🟢	🟡	🟡
TSME23-PIPPA	Initiatives	Implementing	Mark Simonson	☐	☐	☐	☐	☐	☐	🟢	🟢	🟡	🟢
TSME23-QC-Systems (483249)	Initiatives	Implementing	Sarah Elisa Broumand	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢
TSME23-SelfSchedUI (483424)	Initiatives	Implementing	Andrew L Hupp	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢

Project Name	(TSME SRO SYS MAINTENANCE-GENERAL(483910)) TSME SRO SYS MAINTENANCE-GENERAL(483910)
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

Project Status Current

Budget	*Direct Budget:*	20,000.00	*InDirect Budget:* 0.00	*Total Budget:*	20,000.00

Principal Investigator/Client

Funding Agency

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

Project Team	*Project Lead:*	Jeffrey L Smith
	Budget Analyst:	Ivanna Iavorska-Em
	Production Manager:	
	Senior Project Advisor:	Gregg Peterson
	Production Manager:	
	Production Manager:	

Proposal #: no data

Description: This project will be used to support all maintenance/enhancements needs for applications or systems directly to the SurveyTrak production database which would include Surveytrak, ST Administration, SRS RT, and RCLS to name a few.

SRO Project Period 07/2022 - 06/2023

Data Col Period

Security Plan NA

Milestone Dates

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
Pam Swanson
Marsha Skoman
Holly Ackerman
Darnell Christian

Other Project Names: Sys Maint General

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	Oct, 2022 (TSME SRO SYS MAINTEN/	**Project Phase**	Implementing

Risk Level *On Track*

Monthly Update Respondent Payment System - 8 hours
Correcting bugs with Respondent Payment Systems bugs and documenting new features for Mari.
Project Removal/Equipment Return - 32 hours
A new application for Larry Daher (and data managers) to process Project Removal and Return of Equipment help desk tickets. As it turns out this is a very manual process, and having an application to do it will save a significant amount of time.
Migrate SurveyTrak to PowerBuilder 2022

Marsha Skoman has started the process of migrating SurveyTrak to PowerBuilder 2022. She will also fix base bugs in SurveyTrak. She expects this will take about 40 hours over the next 3 months.

Updating STFileMgr

- A task was given to new employee Kelly Lieske.

  Add code for monitoring transaction log file size

- • Need to determine file size warning threshold
- • Examine only the last log file created (to prevent repeat warnings for the same file)
- • Send an email if the file count is above the warning threshold

- Add code for monitoring the number of message files

- • Run after incremental backup runs
- • Application with INI file?
- • INI file should allow the setting of the folder to be monitored, and the file count warning threshold
- • Count the number of files in the monitored folder
- • Send an email if the file count is above the warning threshold

Special Issues

Cost
Oct 31, 2022

Total Cost to Date (Direct + Indirect):	11,649.61
Estimated Cost at Completion (E$AC):	24,912.24
Total Budget:	20,000.00
Variance (Budget minus E$AC):	13,263.24
Reason For Variance:	See monthly updates

Projections
Oct 31, 2022

Dollars Projected For Month:	2,753.23
Actual Dollars Used:	6,785.10
Variance (Projected minus Actual):	4,031.87
Reason For Variance:	See monthly updates

Measures

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

Other Measures

Project Name	(TSME23 DCO Tech System Support FY2023) TSME23-DCO Tech System Support (483248) 2023
Project Mode	Primary: Not Available

Project Type	Developmental Initiatives		**Project Status**	Current

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

Principal Investigator/Client

Funding Agency

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

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

SRO Project Period	07/2022 - 06/2023
Data Col Period	
Security Plan	NA

Milestone Dates

PreProduction Start:		*Pretest 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	Oct, 2022 (TSME23 DCO Tech System	**Project Phase**	Implementing
Risk Level	*Some Concerns*		
Monthly Update	most of the month was spent supporting the new iwer website and updated for the first of the year 2023		
Special Issues	x		

Cost Nov 20, 2022	*Total Cost to Date (Direct + Indirect):*	31,792.67
	Estimated Cost at Completion (E$AC):	31,792.67
	Total Budget:	35,000.00
	Variance (Budget minus E$AC):	3,207.33
	Reason For Variance:	iwer website programming support

Projections
Nov 20, 2022

Dollars Projected For Month:	3,946.93
Actual Dollars Used:	7,572.83
Variance (Projected minus Actual):	-3,625.90
Reason For Variance:	iwer website programming support

Measures

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

Other Measures   With Russ out we are using more of Max's time which will impact the costs

Project Name	(TSME23-PIPPA) PIPPA 2.0 (425198) FY23
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives

Project Status Current

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

Principal Investigator/Client

Funding Agency

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

Project Team   *Project Lead:*   Mark Simonson
              Budget Analyst:
              Production Manager:
              Senior Project Advisor:
              Production Manager:
              Production Manager:

Proposal #:	no data
Description:	PIPPA application on the ODS Server

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

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	Oct, 2022 (TSME23-PIPPA)	**Project Phase**	Implementing
Risk Level	*On Track*		
Monthly Update	Implementing project ranking report.		
Special Issues			

Cost
Nov 20, 2022

Total Cost to Date (Direct + Indirect):	5,329.03
Estimated Cost at Completion (E$AC):	10,664.59
Total Budget:	10,000.00
Variance (Budget minus E$AC):	-664.59
Reason For Variance:	Not sure

Projections
Nov 20, 2022

Dollars Projected For Month:	1,310.43
Actual Dollars Used:	917.38
Variance (Projected minus Actual):	393.05
Reason For Variance:	Work started on ranking report middle of month

Measures

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

Other Measures

Project Name	(TSME23-QC-Systems (483249)) TSME23-QC-Systems (483249)
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives **Project Status** Current
Budget	***Direct Budget:*** 30,000.00 ***InDirect Budget:*** 0.00 ***Total Budget:*** 30,000.00
Principal Investigator/Client	
Funding Agency	
IRB	***HUM#:*** ***Period Of Approval:***
Project Team	***Project Lead:*** Sarah Elisa Broumand
	Budget Analyst: Carl S Remmert
	Production Manager:
	Senior Project Advisor: Shonda R Kruger-Ndiaye
	Production Manager:
	Production Manager:
Proposal #:	no data
Description:	Project used to maintain and further develop Current QC systems such as OLIVE
SRO Project Period	07/2022 - 06/2023
Data Col Period	
Security Plan	NA

Milestone Dates

PreProduction Start:	***Pretest 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	Oct, 2022 (TSME23-QC-Systems (483z **Project Phase** Implementing
Risk Level	*On Track*
Monthly Update	Overall, OLIVE remains actively used and has remained stable for a few years now.

October hours were used to
1. continue developing the Evaluator assessment feature in Olive.
2. Attend meetings related to QC solutions.
3. Train Mark Nathan to take on QC weekly report
4. Update systems that pull from more than one data collection tasks into OLIVE Verification selection View for HRS Main (ST and WEB).

Special Issues

Cost
Oct 31, 2022

Total Cost to Date (Direct + Indirect):	12,489.32
Estimated Cost at Completion (E$AC):	30,473.12
Total Budget:	30,000.00
Variance (Budget minus E$AC):	-473.12
Reason For Variance:	Small variance.

Projections
Oct 31, 2022

Dollars Projected For Month:	3,727.96
Actual Dollars Used:	1,446.07
Variance (Projected minus Actual):	2,281.89
Reason For Variance:	Slight variance, plan to rebalance after this month.

Measures

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

Other Measures

Project Name	(TSME23-SelfSchedUI (483424)) Self-Scheduling Interface for MSMS					
Project Mode	Primary: Not Available					
Project Type	Developmental Initiatives		**Project Status**	Current		
Budget	*Direct Budget:*	10,000.00	*InDirect Budget:*	0.00	*Total Budget:*	10,000.00

**Principal
Investigator/Client**

Funding Agency

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

Project Team

Project Lead:	Andrew L Hupp	
Budget Analyst:	Ivanna Iavorska-Em	
Production Manager:		
Senior Project Advisor:	Shonda R Kruger-Ndiaye	
Production Manager:		
Production Manager:		

Proposal #: no data

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

SRO Project Period 07/2022 - 12/2022

Data Col Period

Security Plan NA

Milestone Dates

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: Andrew Piskorowski - writing stored procedure to summary all appointments
Mark Simonson - possible manager interface for entering management parameters
Peter Sparks - Blaise Developer (R facing page)
James Rodgers - consultant as needed for MSMS

Other Project Names:

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

Report Period	Oct, 2022 (TSME23-SelfSchedUI (4834	**Project Phase**	Implementing

Risk Level   *On Track*

Monthly Update Andrew H. has created a spec of the inputs of parameters that need to be taken into account to develop the appointment slots table. Andrew H reviewed them with Peter and Andrew P. Some of the parameters. There is an on-going discussion as to how some of the parameters should work. For instance, black out days...does Peter use that parameter to decide which days need to be displayed to the R/Inf, or does Andrew P. use that parameter and say there are "0" slots on that particular day that Peter would then exclude that date from display. Andrew H.

discussed these parameters with Jim R. and Rachel O and Daric, as PSID is the first project that will be using the updated scheduler.

The current plan is PSID will use the current (used in 2021) self-scheduler for the pretest. The upcoming work should be completed after the pretest to allow for PSID integration testing prior to their production launch.

Andrew H., Andrew P., and Peter will continue to meet regularly.

Special Issues   The cost report looks a little odd because Peter corrected a timesheet in the last fiscal year in the current fiscal year. Since the same shortcode is being used it looks like there is more money available than the $10,000 (+~$1,800).

Cost

Total Cost to Date (Direct + Indirect):	786.52
Estimated Cost at Completion (E$AC):	9,411.44
Total Budget:	10,000.00
Variance (Budget minus E$AC):	588.56
Reason For Variance:	Haven't received cost report from FSG yet.

Projections

Dollars Projected For Month:	3,096.29
Actual Dollars Used:	786.52
Variance (Projected minus Actual):	2,309.77
Reason For Variance:	The bulk of the projections in September were for Andrew P. His unused hours have been pushed forward.

Measures

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

Other Measures