

Survey Research Operations

Monthly Project Report

Sponsored

November 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-Endline) Every Dollar Counts Endline
 (EDC-SS Phases 3-4) Every Dollar Counts Semi-Structured, Phases 3-4
 (HCAP 2022) Healthy Cognitive Aging Project, 2022
 (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 3)) 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
 (PR-PSID) Puerto Rico Panel Study of Income Dynamics
 (PSID23) Panel Study of Income Dynamics Core 2023
 (PSID23 Online Contact Update) Panel Study of Income Dynamics 2023 Online Contact Update
 (SCA 2022) Surveys of Consumer Attitudes
 (STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study

Sponsored Projects Dashboard

NonArchived Sponsored Projects

[illegible]

Project Name	(AFHS) American Family Health Study					
Project Mode	Primary: Web		Secondary: Mail		Total of Modes: 3	
Project Type	Sponsored Projects				Project Status	Current
Budget	Direct Budget:	1,596,238.00		Indirect Budget:	893,895.00	Total Budget: 2,490,133.00
Principal Investigator/Client	Brady West (Survey Research Center) William Axinn, Mick Couper and James Wagner (Survey Research Center)					
Funding Agency	National Institutes of Health (NIH)					
IRB	HUM#:	00167171		Period Of Approval:		
Project Team	Project Lead:	Rebecca Gatward				
	Budget Analyst:	Dean E Stevens				
	Production Manager:	Lloyd Fate Hemingway				
	Senior Project Advisor:	Grant D Benson				
	Production Manager:					
	Production Manager:					

Proposal #: no data

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

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

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

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

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

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

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

- o We will use an external vendor to scan returned paper screeners, rather than manual data entry. This vendor will also format the paper forms, print materials and be responsible for most of the respondent mailings.
- o The original study design did not include web as a mode of data collection for screening. Additional funding from SRC has been obtained by the Principal Investigator to cover the development of a web screener and associated data management and reporting costs.
- o Telephone reminder calls remains one of the steps in the non-response protocol for the main data collection. However, it is likely that this effort will be targeted to a subset of the selected sample, rather than across the entire sample.
- o The amount budgeted for the TOA for the screener was \$2 and \$5 – 50% of the sample to receive each amount. The TOA amount will now be \$2 for the full sample. We may provide an additional TOA of \$5 to a subset of the non-responders as part of one of the follow-up reminder mailings (depending on available budget).
- o The eligibility age range for the study has been changed from 15-49 to 18-49. This eliminates the need to contact to parents/guardians of all eligible respondents who have not reached the age of majority to gain consent to participate in the study. There are three states where the age of majority is above 18 years of age – in these states we will adjust the selection protocol as necessary.
- o A further change to the study protocol is around completion of the main modules. In some circumstances we

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

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

SRO Project Period
Data Col Period
Security Plan
Milestone Dates

01/2019 - 03/2022
05/2020 - 04/2022
NA

PreProduction Start: 09/01/2018
Pretest End:
Staffing Completed:
SS Train Start:
DC Start: 04/21/2020

Pretest Start:
Recruitment Start:
GIT Start:
SS Train End:
DC End: 04/30/2022

Other Project
Team Members:

SRO Team: Andrew Hupp, Laura Yoder, Rose Zdybel, Lloyd F Hemingway, Jim Rodgers, Colette Keyser, Deb Wilson, Wen Chang

Other Project
Names:

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

Sample Mgmt Sys

MSMS

Data Col Tool

Blaise 5

Hardware

Desktop

DE Software

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

QC Recording Tool

N/A

Incentive

Yes, R

Administration

SRO Group

Payment Type

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

Payment Method

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

Report Period

Nov, 2022 (AFHS)

Project Phase

Closing

Risk Level

On Track

Monthly Update

November update

Overspend amount has decreased by ~\$4000 due to refunded checks.

Current SRO focus: Work on the two additional components, AFHS Panel Feasibility Survey and AFHS non-response follow-up has been completed. Any hours spent on AFHS tasks (projected just for Me, Colette and Dean) are being charged to the AFHS Feasibility budget. 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

Dec 07, 2022

Total Cost to Date (Direct + Indirect): 2,512,538.37

Estimated Cost at Completion (E\$AC): 2,512,538.37

Total Budget: 2,490,133.00

Variance (Budget minus E\$AC): -22,405.37

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
Dec 07, 2022

Dollars Projected For Month:

0.00

Actual Dollars Used:

-4,149.60

Variance (Projected minus Actual):

4,149.60

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. The overspend is decreasing due to reversed respondent checks that were issued 12 months ago and not cashed being voided.

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

Measures

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

Other Measures

Project Name	(AFHS-Additional work) American Family Health Study - additional work		
Project Mode	Primary: Web	Secondary: Mail	Total of Modes: 3
Project Type	Sponsored Projects	Project Status	Current
Budget	Direct Budget: 50,265.00	Indirect Budget: 0.00	Total Budget: 50,265.00
Principal Investigator/Client	Brady West (SRC)		
Funding Agency	Internal UM sequestering funds		
IRB	HUM#: HUM00167171	Period Of Approval:	
Project Team	Project Lead: Rebecca Gatward Budget Analyst: Dean E Stevens Production Manager: Lloyd Fate Hemingway Senior Project Advisor: Grant D Benson Production Manager: Production Manager:		
Proposal #:	no data		
Description:	<p>The American Family Health Study is a methodological project which aims to evaluate the feasibility of collecting national family, fertility and reproductive health data on a nationally-representative sample using a self-administered mode that is comparable to data collected with an in-person (interviewer-administered) study. The research design for the AFHS has seven clear steps. The additional work covered by this funding is to conduct step 7 (below):</p> <p>Step 1: finalize the design of the national web-based survey, using as much National Survey of Family Growth (NSFG) content as possible.</p> <p>Step 2: field the national web-based sequential mixed-mode survey over a two-year period, with the goal of collecting 4,000 completed surveys from a nationally representative sample.</p> <p>Step 3: conduct statistical analyses providing full-sample comparisons of estimates between our survey and the corresponding public-use data files for the NSFG from a similar time period.</p> <p>Step 4: conduct statistical analyses comparing estimates within key socio-demographic subgroups of the population – gender, race, and age groups.</p> <p>Step 5: examine changes in the gap in estimates (between the NSFG and our national web survey) across phases of the sequential mixed-mode design protocol.</p> <p>Step 6: compare costs, response indicators, and measures of effort across socio-demographic subgroups for different data collection modes and modules of the web-based survey.</p> <p>Step 7: further methodological research involving AFHS participants and non-respondents to inform the design of a larger-scale AFHS (research proposal).</p> <p>*****AFHS Panel Feasibility Survey*****</p> <p>The first component of this step involves AFHS respondents from the second sample replicate (n=~1370). These respondents will be invited to participate in a brief follow-up survey that aims to collect responses to a small number of additional questions (12) related to health, relationships, and finances, as well as gauge the interest of the respondent in becoming a panel member. These results will primarily be used to inform the design of a larger-scale AFHS study (research proposal); additional substantive analyses of the questions will also be conducted.</p> <p>All AFHS participants from the second sample replicate (n=~1370) will be invited to participate in the panel feasibility follow-up survey. The initial invitation to participants will be by letter, which will be mailed along with a \$2 token of appreciation. We will use addresses sampled for sample replicate 2 from the GENESYS system of Marketing Systems Group (MSG) - unless we received an updated address from the participant. We will also send the invitation by email for those participants who have provided a valid email address (84%).</p> <p>Non-response contact protocol:</p> <p>7 days after the initial invitation is mailed, participants will be contacted again by email (if available).</p> <p>14 days - we will send a further reminder by email or text message.</p> <p>21 days - email sent.</p> <p>28 days - paper copy of the survey along with a \$5 cash token to remaining non-responding participants.</p> <p>42 days - depending on the response rate we will telephone the participant to invite them to complete the follow-up survey.</p> <p>Participants will be mailed a \$10 check after completing the survey.</p>		

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

Status:

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

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

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

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

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

SRO Project Period
Data Col Period
Security Plan
Milestone Dates

06/2022 - 09/2022

06/2022 - 08/2022

NA

PreProduction Start:

Pretest End:

Staffing Completed:

SS Train Start:

DC Start:

Pretest Start:

Recruitment Start:

GIT Start:

SS Train End:

DC End:

Other Project
Team Members:

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

Other Project
Names:

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

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

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

Risk Level On Track

Monthly Update November 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' for question and computed variables (I have a note that we should include hours for DM to do this in the new budget for the AFHS panel.
 The PI group are expecting to submit a new research proposal for the AFHS Panel in early March 2023.

Special Issues

Cost
Dec 07, 2022

Total Cost to Date (Direct + Indirect):	54,657.70
Estimated Cost at Completion (E\$AC):	54,657.70
Total Budget:	50,265.00
Variance (Budget minus E\$AC):	-4,392.70
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
Dec 07, 2022

Dollars Projected For Month:	1,305.79
Actual Dollars Used:	1,231.23
Variance (Projected minus Actual):	74.56
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:	<p>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.</p> <p>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.</p> <p>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).</p> <p>SRO will be responsible for four interactions with the selected mothers/infants:</p> <ul style="list-style-type: none">• 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. <p>Each data collection phase/wave will be a full 12 months, with Baseline starting in April 2018:</p> <p>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</p>				
SRO Project Period	10/2017 - 12/2020				
Data Col Period	04/2018 - 12/2020				
Security Plan	NA				

Milestone Dates

PreProduction Start: 10/01/2017
Pretest End:
Staffing Completed: 02/07/2018
SS Train Start: 03/20/2018
DC Start: 05/07/2018

Pretest Start:
Recruitment Start: 01/01/2018
GIT Start: 03/19/2018
SS Train End: 03/22/2018
DC End: 06/30/2022

Other Project**Team Members:**

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

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

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

Report Period

Nov, 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 12/20 we have handed off 563 of 1,000 cases.

We continue to follow the plan outlined during the September BFY advisory board meeting wherein our SRC iwers help Lab teams achieve their response rate targets. We are conducting line-by-line reviews and guide RAs/Site Coordinators in strategies for those cases, providing in-service training similar to the training offered to our Iwers (e.g., addressing R concerns, etc.), and directly reaching out to and locate some hard-to-reach Rs. We have worked on ~ 30 cases so far with a goal to find and invite to the lab and will ingest more around the holidays.

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 563 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 a larger underrun beyond what was communicated to the PIs in September. The new underrun projections will be shared with the project team in January.

Special Issues

Cost
Dec 19, 2022

Total Cost to Date (Direct + Indirect):	6,812,161.33
Estimated Cost at Completion (E\$AC):	7,383,057.90
Total Budget:	7,496,643.73
Variance (Budget minus E\$AC):	113,585.83
Reason For Variance:	Underrun continues to increase due to savings across staff levels. We plan to communicate the increase in underrun from ~\$60K to the current ~\$115K to the PIs in January.

Projections
Dec 19, 2022

Dollars Projected For Month:	65,092.94
Actual Dollars Used:	39,073.37
Variance (Projected minus Actual):	26,019.57
Reason For Variance:	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/Uniformer 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:	<p>The project follows academy cadets post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure.</p> <p>This project has an overall SRO involvement period of 13 months, beginning March 2022, with data collection taking place over approximately 12 months starting mid-March 2022. SRO provides consultation, respondent locating activities and data collection for respondents in the uniformed services sample.</p> <p>The goal is to secure participation from approximately 3,200 unique past-CARE study participants. Participants will complete a study assessment once over the 13-month project period. SRO decentralized field interviewers locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct approximately 1,425 telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.</p> <p>The estimate total cost for the overall scope of work is \$1,426,001.00. This includes \$1,131,747.00 direct and \$294,254.00 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders).</p>				
SRO Project Period	02/2022 - 03/2023				
Data Col Period	03/2022 - 02/2023				
Security Plan	NA				
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="text-align: center; vertical-align: top;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>			PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:				
Other Project Team Members:	Donnalee Grey-Farquharson, Stacy Quisenberry, Hongyu Johnson, Keith Liebetreu, James Koopman, Minako Edgar, David Ackuaku, Carl Remmert				
Other Project Names:	CARE-CSI Military				
Sample Mgmt Sys	Other (non-SRO)				
Data Col Tool	Other (non-SRO)				
Hardware	Laptop; [UM cell] Phone				
DE Software	N/A				
QC Recording Tool	N/A				
Incentive	Yes, R				
Administration	Other (Kinesiology)				
Payment Type	Check, post (\$150)				
Payment Method	Other (Kinesiology)				

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

Risk Level On Track

Monthly Update

Project Management:

The CARE Researchers are currently looking at various avenues to fund the continuation of data collection beyond March 2023 without delaying in order to align with the civilian data collection. Options they are considering include reallocation of funds from other arms of the CARE Research or the possibility of using current ISR MTEC funds. The latter option will require approval from the MTEC/funders and would require an official scope change as it would reduce the currently proposed 5 year data collection period. Since there would be an increase in the sample size to include the military lines, expected completions would need to be adjusted to reflect the shortened time. If this latter route is taken, the Researchers plan to seek funds that would allow them to continue to 2026 as originally planned.

CARE had a request approved to receive email addresses and phone numbers directly from the DoD for the military sample. This contact data has been received by the CARE data group who are in the process of editing and preparing it for upload to the system.

ISR would like to be able to prioritize the sample on characteristics that inform target groups, e.g. gender, sport, high/low exposure and requested this information at least two months ago. However, there has been a delay in getting this information to us because the PIs are restructuring their target groups. There is the possibility that the delay in receiving/identifying priority groups may lead to not having enough time to effect a data collection protocol that focuses on these groups to ensure that cells are sufficiently complete to attain statistical power. While we wait, we will prioritize the high exposure group and a subset of the low exposure group that the study team has identified as important in the new release (5) expected in December 2022.

Care SMS system update:

Respondents continue to have issues with the registration/login process and require ISR interviewers' efforts to navigate, which is not in scope. Discussion of programming and technical issues are ongoing with the PI.

Respondent payments are not processed by ISR but Rs do contact us with payment queries. While the system displays payment, there was no central location to enter inquiries or to record information from the Kinesiology team regarding the payment. After months of waiting ISR system now has a notes field in Payment tab. This will help us streamline respondent payment queries.

ISR expected to have started system testing for new features spec'd for the next round of data collection to start in spring 2023. To date, none of these has been programmed for ISR to test. This may delay the start of production for the 2023 round/wave.

Questionnaire Development:

Updated questionnaires for the next round of data collection have been received. ISR is currently creating the Interviewer administered versions.

Production:

ISR received Release 4 with 348 cases.

Productivity is marching slightly up with a special focused on Military sample heavily during the week of Veteran's Day for boosting the production. A planned QG system outage has caused paused production and respondent access for an entire day, which likely lowered response rate. To increase productivity, managers are encouraging interviewers to fulfill at least their minimum commitment, and have extended the offer to work up to 40 hours to all interviewers. In December, we will field a production challenge that we hope will boost productivity.

Field calls occur biweekly. TLs also led a "refresher" training call in separate groups the week of Thanksgiving that allowed interviewers to ask questions in a smaller setting.

Production Stats as of 11/30/2022:

8707 Released: Total Comp lws-1926-22.2% (Web-1900-21.9%, CATI-26-0.3%)

Hiring and Training:

Some Interviewers who were hired to work on the Military sample only will be moving to other projects when data collection ends in spring 2023.

DMSS:

Encountered challenges on reporting on respondents who were moved from Tier 1 to Tier 2 (in-person physical

assessment group) and who disappeared from the daily data delivery file. Currently ISR has to make the adjustment manually.

Continue to provide QC reports to the PM by using Verizon phone records.

Locating:

With a new IRB approved locating protocol, the locating team started sending direct messages on Social Media (Instagram) using the CARE Instagram account. The outcomes are positive: Military Find Rate = 44%

Special Issues

Cost

Nov 30, 2022

Total Cost to Date (Direct + Indirect): 718,214.22

Estimated Cost at Completion (E\$AC): 1,357,888.02

Total Budget: 1,426,001.00

Variance (Budget minus E\$AC): 68,112.98

Reason For Variance:

Extra funding of \$100,000 (direct cost) and \$26,000 (indirect cost) were added to the project after the proposed budget was finalized.

We have been monitoring the amount of the underrun and making adjustment. We have been strategizing to boost production and minimize the underrun through the next few months.

Projections

Nov 30, 2022

Dollars Projected For Month: 126,531.15

Actual Dollars Used: 94,674.74

Variance (Projected minus Actual): 31,856.41

Reason For Variance:

Some Interviewers are not working their committed/agreed on weekly hours. We are taking steps to correct this.

Measures

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

Other Measures

Project Name	(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022					
Project Mode	Primary: Telephone	Secondary: Web	Total of Modes: 2			
Project Type	Sponsored Projects		Project Status	Current		
Budget	Direct Budget:	3,718,978.00	Indirect Budget:	966,936.00		
			Total Budget:	4,685,914.00		
Principal Investigator/Client	Dr. Steven Broglio (U of M Kinesiology) Dr. Michael McCrea (Medical College of Wisconsin) Dr. Thomas McAllister (Indiana University School of Medicine)					
Funding Agency						
IRB	HUM#:	00202691	Period Of Approval:	7/23/2021 - open		
Project Team	Project Lead:	Donnalee Ann Grey-Farquharson				
	Budget Analyst:	Carl S Remmert				
	Production Manager:	Stacy Quisenberry				
	Senior Project Advisor:	Barbara Lohr Ward				
	Production Manager:	Hongyu Johnson				
	Production Manager:	Keith Liebetreu				
Proposal #:	no data					
Description:	<p>SRO will provide consultation, respondent locating activities and data collection for respondents in the longitudinal Concussion Assessment, Research and Education (CARE) study, with the goal of securing participation from 7,500 unique past-CARE study participants. Participants will complete the same set of study assessments at two time points over the five-year project period. The project follows collegiate athletes post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure. Specifically, SRO decentralized field interviewers will locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.</p> <p>This budget assumes an overall SRO involvement period of approximately 44 months over two waves. Wave 1 SRO involvement will begin in December 2021 with data collection taking place over approximately 12 months, beginning approximately May 2022. Wave 2 SRO involvement will begin in November 2023 with data collection taking place over approximately 12 months starting in May 2024.</p> <p>Currently, the total cost for the overall scope of work (based on the currently committed funding from all sources) is estimated at \$4,685,914. This includes \$3,718,978 direct and \$966,936 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders). As additional sources of funding are identified and those resources committed to SRO survey data collection activities, or inversely if a funder withdraws or reduces their level of funding to the project, the scope of work (e.g., the number of interviews to be collected) will increase or decrease respectively.</p> <p>The estimate of funding contributed by the Department of Defense through the MTEC RFP is \$2,277,689. This includes \$1,807,689 direct costs and \$470,000 indirect costs budgeted at the 26% indirect cost rate. The proposed period of support is September 1, 2021 through August 31, 2025.</p>					
SRO Project Period	10/2021 - 08/2026					
Data Col Period	03/2022 - 02/2026					
Security Plan	NA					
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="width: 50%; vertical-align: top;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>				PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:					
Other Project Team Members:	Donnalee Grey-Farquharson, Stacy Quisenberry, Hongyu Johnson, Keith Liebetreu, James Koopman, Minako Edgar, David Ackuaku, Carl Remmert					

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

Report Period	Nov, 2022 (CARE SALTOS MTEC)	Project Phase	Implementing
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Risk Level	<i>On Track</i>
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Monthly Update	<p>Project Management:</p> <p>Discussion of programming and technical are ongoing with the PI.</p>
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ISR would like to be able to prioritize the sample on characteristics that inform target groups, e.g. gender, sport, high/low exposure and requested this information at least two months ago. However, there has been a delay in getting this information to us because the PIs are restructuring their target groups. There is the possibility that the delay in receiving/identifying priority groups may lead to not having enough time to effect a data collection protocol that focuses on these groups to ensure that cells are sufficiently complete to attain statistical power. While we wait, SRO will try to offset potential issues by using our knowledge of the sample and flagging as priority high exposure cases (since these are definitely important to a concussion study) and try to balance those completions by gender.

Care SMS system update:

Respondent payments are not processed by ISR but Rs do contact us with payment queries. While we did have a display of information when payment was sent there was no central location to enter the inquiries or to record information we solicited from the Kinesiology team regarding the payment. After months of waiting ISR system now has a notes field in Payment tab. This will help us streamline respondent payment queries.

Cases are being moved in and out of the ISR system to other in-person physiological assessment groups. System tracking and display would reduce/eliminate possible errors, a programming request made by ISR during pre-production. However, this was not programmed; ISR was told that movement would only happen between waves and not during a data collection period. That has changed and lines are moving in and out of the SRO sample. Since the system has not been programmed to record sample movement, and the daily delivered data that ISR receives does not indicate the movement specifically, there is no automated way to track and record sample movement and the management team has no confidence that this movement of sample lines is being efficiently/precisely recorded. As a result reporting may not be accurate if there is human error, for example, failure to notify ISR when moving sample (which has happened) via email or verbally. In addition, Interviewers do not have a ready way to see Respondent data when a case is pulled from the ISR sample. Therefore, if a Respondent does call ISR for follow-up of any kind the Interviewer may not be able to view information that would enable him/her to adequately help or direct the Respondent. All these may result in incorrect reporting and inefficient efforts and so increase cost.

Respondents continue to have issues with the registration/login process and require ISR interviewers' efforts to navigate, which is not in scope.

Programming for the next wave was expected to have begun in fall 2022 with ongoing testing to be ready for the next production period 04/2023. To date this has not started and may delay the start of production for the 2023 wave.

Questionnaire Development:

Updated questionnaires for the next round of data collection have been received. ISR is currently creating the Interviewer administered versions.

Production:

ISR received Release 4 with 2408 civilian cases.

Productivity is going okay but we would like it to be better. A planned QG system outage has caused paused

production and respondent access for an entire day, which likely lowered response rate. To increase productivity, managers are encouraging interviewers to fulfill at least their minimum commitment, and have extended the offer to work up to 40 hours to all interviewers. In December, we will field a production challenge that we hope will help.

Field calls occur biweekly. TLs also led a "refresher" training call in separate groups the week of Thanksgiving that allowed interviewers to ask questions in a smaller setting.

Production Stats as of 11/30/2022:

10593 Released: Total Comp lws-2238 - 21.2% (Web-2210-20.9%, CATI-28-0.3%)

Hiring and Training:

We are negotiating with other projects regarding sharing and/or releasing interviewers. These changes will become effective in spring 2023.

DMSS:

Encountered challenges on reporting on respondents who were moved from Tier 1 to Tier 2 (in-person physical assessment group) and who disappeared from the daily data delivery file. Currently ISR has to make the adjustment manually.

Continue to provide QC reports to the PM by using Verizon phone records.

Locating:

With a new IRB approved locating protocol, the locating team started sending direct messages on Social Media (Instagram) using the CARE Instagram account. The outcomes are positive: Civilian Find Rate = 33%

Special Issues

Cost
Nov 30, 2022

Total Cost to Date (Direct + Indirect):	712,762.82
Estimated Cost at Completion (E\$AC):	4,687,353.83
Total Budget:	4,685,914.00
Variance (Budget minus E\$AC):	-1,439.83
Reason For Variance:	The overrun is partly due to replacing the current production manager with a senior production manager who is at a higher rate. Will closely monitor.

Projections
Nov 30, 2022

Dollars Projected For Month:	70,910.27
Actual Dollars Used:	71,052.82
Variance (Projected minus Actual):	-140.55
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:	<p>Revised project costs are \$635,344 (\$625,726 + \$9,618). Original description below. Focus groups completed as designed. Project has been revised in that the PI has requested only an initial replicate be used for the survey pending full funding availability. Also, full indirect rate is not applied as we originally indicated. ORSP and Financial Services determined this was not research but was in fact other sponsored activity. IDC revised to 29%. ORIGINAL DESCRIPTION:</p> <p>SRO will conduct two exploratory focus groups and web-based data collection to study awareness, use and adoption of crypto-assets in the general population and more specifically among those more informed about crypto-assets. SRO will screen an address-based representative sample of approximately 40,980 U.S. households for adults who hold or have held crypto-assets. All who report crypto-asset holdings will be invited to participate in the web survey, along with a random sub-sample of those who have not held crypto-assets. SRO interviewers will conduct reminder calling to non-respondents to encourage them to participate in the survey.</p> <p>This budget assumes an overall SRO involvement period of 12 months commencing in May 2022 with focus groups taking place in May or early June 2022 and the web data collection taking place during a 5-month period beginning September 2022. The total cost for this work is estimated at \$1,724,766 (\$1,105,619 direct, \$619,147 indirect), budgeted at the University-approved indirect recovery rate of 56 percent.</p> <p>\$635,344 (\$625,726 + \$9,618).</p>													
SRO Project Period	05/2022 - 04/2023													
Data Col Period	10/2022 - 02/2023													
Security Plan	NA													
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start: 08/01/2022</td> <td style="padding: 5px;">Pretest Start:</td> </tr> <tr> <td style="padding: 5px;">Pretest End:</td> <td style="padding: 5px;">Recruitment Start: 09/14/2022</td> </tr> <tr> <td style="padding: 5px;">Staffing Completed: 10/14/2022</td> <td style="padding: 5px;">GIT Start: 11/29/2022</td> </tr> <tr> <td style="padding: 5px;">SS Train Start: 11/29/2022</td> <td style="padding: 5px;">SS Train End: 11/29/2022</td> </tr> <tr> <td style="padding: 5px;">DC Start: 11/02/2022</td> <td style="padding: 5px;">DC End: 03/01/2023</td> </tr> </table>				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
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	Nov, 2022 (CRUSE - AHDFS)	Project Phase	Implementing
Risk Level	Some Concerns		
Monthly Update	<p>Crypto data collection has launched on 11/3 with 507 invitations to Rep 1 and other Reps followed soon. Rep sizes, launch dates, and the current status are listed below.</p> <p>1: 507 11/3/2022, moved to SSL non-response follow up on 11/29 2: 2,049 11/10/2022, moved to SSL NRFU on 12/07 3 & 4: 7,684 11/15/2022, moved to SSL NRFU on 12/13 Total: 10,240</p> <p>As of 12/20 we have 970 completes of the 1529 goaled completes representing 9.5% response rate (goal 14.9%).</p> <p>So far the completes appear balanced on key income / geo distribution and the Crypto use levels track known indices. 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-do-ne-worse-than-expected/</p> <p>However, we do have concerns with achieving the target response rate. While SSL effort is excellent, the productivity of calls (surveys completed after the calls) is still fairly low and disappointing.</p> <p>Current goal is to attempt all of the 6189 lines available for calling at least once prior to holidays. We dead-end around 11% of phone numbers available to call (had a phone number appended by MSG)</p> <p>As of 12/12 we have Attempted 1404 cases and our dials per hour were around 15, however we have obtained only 9 completes from Rs attempted during NRFU after initial mailings were completed.</p> <p>At this rate, we would fall short of the goal achieving around 1200 - 1300 completes.</p> <p>After consultation with Admin we will try the following strategies:</p> <p>1) Step up monitoring of iwer calls and to ask some managers experienced with cold-calling to advise on the scripts used and see if we can improve our talking points.</p> <p>2) Try to "push" the link a bit more than we do now when we identify a phone number / contact an Inf living @ the selected address. Right now interviewees are "offering" to send the link via text / email but we will tell them to always insist that R gets it via one of those methods. We discussed Stephanie's suggestion a bit more and decided to make it a convenience/efficiency appeal "We will text you or email you the link and you can just click and complete ...".</p> <p>3) We do have a mail Reminder 3 / end-game in our plan and if the SSL productivity does not improve, we will consider boosting the incentive. Reminder 2 yielded a meager + 1% RR and that will not be enough to get us to the goal so Reminder 3 will need to include some "bombshell". SSL's task is to use-up between 1/3 - 1/2 of their budgeted hours through early January which should leave some room in the budget for the incentive increases.</p> <p>4) The last outside the box idea is to take advantage of all the MSG cell phone numbers we received by sending a cold-text. However, we need to discuss the feasibility of this approach in the context of TCPA.</p>		
Special Issues			
Cost			
Dec 19, 2022	Total Cost to Date (Direct + Indirect):	229,134.84	
	Estimated Cost at Completion (E\$AC):	640,295.34	
	Total Budget:	635,344.00	
	Variance (Budget minus E\$AC):	-4,951.34	
	Reason For Variance:	Projecting some overrun which will be nullified by upcoming staffing / reduction decisions.	
Projections			
Dec 19, 2022	Dollars Projected For Month:	184,479.38	
	Actual Dollars Used:	104,523.95	
	Variance (Projected minus Actual):	79,955.43	
	Reason For Variance:	Most of the variance comes from unrealized PO to the mailing vendor of which only 1/3 had been paid and needs to be moved forward.	

Measures	Units Complete		RR	HPI
	<i>Current Goal:</i>	1529	14.9%	
	<i>Goal at Completion:</i>	1529	14.9%	
	<i>Current actual:</i>	970	9.5%	
	<i>Estimate at Complete:</i>	1529	14.9%	
	<i>Variance:</i>			

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:	<p>The goal of ECHO is to understand pressing childhood health concerns such as autism spectrum disorders, low birth weight and childhood obesity. The project will collect survey data and a series of bio-specimens in order to assess the effects of persistent organic pollutants and heavy metals, maternal nutritional or weight status in pregnancy, and pregnancy infection and inflammation on the health of children.</p> <p>The study includes two sample cohorts: a cohort from previous, ongoing data collection efforts as well as new sample. This existing sample cohort includes mothers and children recruited in 2011 or later for the Archive for Research in Child Health (ARCH) study in the Lansing area. The newly recruited sample cohort, MARCH (Michigan Archive for Research in Child Health), will consist of 1,100 pregnant women: 1) a statewide probability sample of 1,000 women from 20 prenatal clinics affiliated with 10 hospitals located in Ann Arbor, Dearborn, Detroit, Grand Rapids, Novi, Saginaw, Port Huron and Traverse City, and 2) 100 women from one clinic in Flint.</p> <p>SRO's work scope is divided into two phases. During Phase 1, SRO provided assistance with prenatal questionnaire development and designed technical systems for MARCH cohort recruitment conducted by Michigan State University-employed (and other hospital-employed) interviewers and affiliated project staff. During Phase 2, SRO developed systems and is conducting data collection for MARCH sample 3-month. The MARCH age 4-5 follow up interviews and home visits are also in SRO's work scope. All other follow up protocols with the MARCH sample will be administered via REDCap by the MSU team (e.g. at 9-month, age 2 and age 3).</p> <p>For the MARCH sample, expectant mothers are recruited during their initial prenatal visit to a healthcare provider. During a follow up phone call, respondents are asked to complete an interview about nutrition, levels of physical activity, use of healthcare services, physical and mental health, prescription medications and other substance use. In addition, women are asked to give blood samples in the first and second trimesters and urine samples in all three trimesters.</p> <p>The sample recruitment and administration of prenatal interviews is conducted by MSU-employed (and other hospital-employed) interviewers using SRO's technical systems and laptops. SRO programmed all questionnaires administered during recruitment, the sample management system(s), and the system to keep track of the collection and storage of blood and urine samples. When babies are born, the research team obtains hospital birth records for the mother and child and a placenta sample. The first MARCH babies were born in early 2018.</p> <p>SRO's data collection activities start after the MARCH babies are born. The first interview with the mother is done when the baby is 3-6 months old. Mothers are interviewed again by MSU when the children are 9-12 months old, and yearly after that until the child is 4 years old. When the children are 3 months old, mothers are asked to provide a child fecal sample and toenail clippings, and at age 4 they will provide shed teeth. Children from the MARCH cohort will be assessed using standardized developmental assessments at 4-5 years old. The assessments will be done during in-home visits.</p>				
SRO Project Period	01/2017 - 08/2023				
Data Col Period	05/2018 - 08/2023				
Security Plan	NA				

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

Ian Ogden: Project Manager
 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****Data Col Tool****Hardware****DE Software****QC Recording Tool****Incentive****Administration****Payment Type****Payment Method**

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

Report Period

Nov, 2022 (ECHO (Year 7))

Project Phase

Implementing

Risk Level*On Track***Monthly Update**

[Phase 1: Recruitment and Prenatal Surveys]

The MARCH recruitment target is 1,110 mothers / live births. As of the writing of this report, this target has been met and may be exceeded.

 [Phase 2: 3-Month Data Collection Summary as of 12/19/22]

3-month sample released: 942
 3-month interviews completed: 676
 Average attempts / lw: 7.7
 lw length: 35 min.
 Response Rate: 73%
 3-month biospecimen collected: 388

 [Phase 3: Age 4 REDCap Survey as of 12/19/22]

Age-4 sample released: 195
 REDCap surveys completed: 117
 Response Rate: 60%

 [Phase 3: Age 4 In-Person Visit Protocols as of 12/19/22]

Age-4 IPV sample released: 92
 In-person visits completed: 34

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 Dec 19, 2022

Total Cost to Date (Direct + Indirect):	134,921.70
Estimated Cost at Completion (E\$AC):	598,847.00
Total Budget:	599,091.00
Variance (Budget minus E\$AC):	244.00
Reason For Variance:	We are deliberately projecting to budget as we're early in Y7 and--with our inability to directly replace Terri's role--would otherwise be projecting an underrun. We're currently rolling our underrun into an unnamed SSS line but have used these funds to offset other small increases. e.g. adjustments to management time and data ops.

Projections Dec 19, 2022

Dollars Projected For Month:	80,093.73
Actual Dollars Used:	85,321.32
Variance (Projected minus Actual):	-5,227.59
Reason For Variance:	TSG, Iwer, and Production/Project Management hours came in slightly higher than projected.

Measures

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

Other Measures

Project Name	(EDC Midline) Every Dollar Counts Program Evaluation Midline Surveys					
Project Mode	Primary: Telephone		Secondary: Face to Face		Total of Modes: 2	
Project Type	Sponsored Projects				Project Status	Current
Budget	Direct Budget:	1,513,016.00	Indirect Budget:	611,135.00	Total Budget:	2,124,151.00
Principal Investigator/Client	Elizabeth Rhodes (OpenResearch Lab) Stephanie Chardoul (Survey Research Operations) Sarah Miller (Universityof Michigan)					
Funding Agency						
IRB	HUM#:	HUM00145626/CR	Period Of Approval:	1/25/2021-1/18/2022		
Project Team	Project Lead:	Barbara Lohr Ward				
	Budget Analyst:	Megan Gomez-Mesquita				
	Production Manager:	Barbara Aghababian-Homburg				
	Senior Project Advisor:	Nicole G Kirgis				
	Production Manager:	Donnalee Ann Grey-Farquharson				
	Production Manager:	Melissa Luker				
Proposal #:	no data					
Description:	The overall project is funded by a consortium (currently consisting of both OpenResearch Lab (Open) and NIH.					

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

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

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

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

All remaining cases will be interviewed by telephone (approximately 2,550 interviews). Telephone interviews will be administered from the SSL and by decentralized field staff. With each respondent, SRO will:

- Confirm continued consent to participate (no actual consent forms will be reviewed with respondents, and no signatures are required at the midline measurement)
- Request contact information for friends and family to help locate the respondent in the future if we cannot reach them
- Administer the questionnaire (approximately 80 minutes in length)

Approximately 14,635 interviewer hours are allocated for these activities (based on estimated HPIs of 5.5 and 6.0 for telephone interviews completed by the SSL and by decentralized field interviewers, respectively).

Post Collection Processing:

- SRO will conduct standard data cleaning and produce a preliminary and final dataset with documentation.

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

- We have not budgeted for coding any open-ended responses.

Deliverables:

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

SRO Project Period
Data Col Period
Security Plan
Milestone Dates

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

PreProduction Start:

Pretest End:

Staffing Completed: 03/04/2022

SS Train Start: 02/28/2022

DC Start: 04/04/2022

Pretest Start:

Recruitment Start: 01/01/2022

GIT Start: 02/26/2022

SS Train End: 03/31/2022

DC End: 08/14/2022

Other Project
Team Members:

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

Other Project
Names:

Sample Mgmt Sys

Data Col Tool

Hardware

DE Software

QC Recording Tool

Incentive

Administration

Payment Type

Payment Method

SurveyTrak

Blaise 4.8

Laptop; [UM cell] Phone

N/A

Camtasia

Yes, R

SRO Group; Other (PI Payment)

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

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

Report Period

Nov, 2022 (EDC Midline)

Project Phase

Closing

Risk Level

On Track

Monthly Update

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.
- 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.
- 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.

Special Issues

Cost
Dec 07, 2022

Total Cost to Date (Direct + Indirect):	1,637,574.68
Estimated Cost at Completion (E\$AC):	1,637,574.68
Total Budget:	2,124,151.00
Variance (Budget minus E\$AC):	486,576.32
Reason For Variance:	<input type="checkbox"/> 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. <input type="checkbox"/> Hours per interview are exceptionally low due to heavy use of the self-scheduler. Final overall HPI: 3.01.

Projections
Dec 07, 2022

Dollars Projected For Month:	1,699.94
Actual Dollars Used:	-7,871.10
Variance (Projected minus Actual):	9,571.04
Reason For Variance:	A number of timesheet corrections were posted to the project (from Midline to Endline shortcodes).

Measures

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

Other Measures

Project Name	(EDC-Endline) Every Dollar Counts Endline			
Project Mode	Primary: Telephone	Secondary: Face to Face	Total of Modes: 2	
Project Type	Sponsored Projects		Project Status	Current
Budget	Direct Budget:	2,826,807.00	Indirect Budget:	963,513.00
			Total Budget:	3,790,320.00
Principal Investigator/Client	Stephanie Chardoul (SRO) Sarah Miller (Ross Business School)			

Funding Agency

IRB **HUM#:** HUM00164105 **Period Of Approval:** 12/23/2022-12/23/23

Project Team
Project Lead: Barbara Lohr Ward
Budget Analyst: Christine Evanchek
Production Manager: Barbara Aghababian-Homburg
Senior Project Advisor: Nicole G Kirgis
Production Manager: Karin Schneider
Production Manager: Donnalee Ann Grey-Farquharson

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, and the Midline interviews in July 2022. The EDC Endline project will reach out to all Baseline respondents for completion of a telephone interview, followed by an in-person interview (with cognitive tasks, anthropometric measurements and collection of dried blood spots) for those respondents still in the greater Chicago area or greater Dallas/Ft. Worth area. Data collection will take place between March 2023 and late September 2023. SRO assumes approximately 91% of the 2,990 Baseline respondents are located and willing to be interviewed again (2,720 90-minute telephone interviews). SRO assumes that in-person interviews will be completed with 2,003 respondents still living in the greater Chicago or Dallas/Ft. Worth and Waco area. About 400 respondents are known to currently reside outside of these areas; these respondents will not be asked to complete an in-person interview. The in-person interviews will include collection of consent for administrative data collection, collection of Social Security number, completion of self-administered on-line cognitive assessments, collection of blood pressure, height, weight, and dried blood spots. We assume that 1,957 respondents will participate in the dried blood spot collection. Following collection of the dried blood spots, SRO interviewers will package and ship the dried blood spot cards to the laboratory chosen by ORL.

- Our budget assumes up to 2,720 telephone interviews are completed and allows for at least six telephone attempts on all non-resistant cases with working telephone numbers. SRO will track and monitor contact attempts to examine the efficacy of contact windows in the first replicate of the sample.
- The budget assumes approximately 2,003 cases complete the in-person component and 1,957 consent to the DBS collection.
- Mileage costs for fieldwork are budgeted at 2,003 trips of no more than 120 miles per round trip.
- Cash incentives of \$15,000 are included in the budget estimate to facilitate in-person payments to reluctant and hard-to-reach participants and individuals who are asked to assist in the location of these participants. All other participant incentive payments are the responsibility of Open.
- Supplies/kits for DBS are included in the estimate consistent with our most recent project experience. Further discussion with the University of Washington laboratory may result in the refinement of the materials and method for drying the bio specimens and associated costs of project supplies.

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) to allow for merging and data analysis. Our main documentation is conveyed through data dictionaries and a questionnaire codebook.

We have not budgeted for coding any open-ended responses.

Deliverables:

- SRO will provide daily, automated delivery of questionnaire data, cognitive tasks, 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
 - ☐ 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 Endline to reconcile any outstanding discrepancies in the data.
- SRO will also deliver:
 - o Daily data collection progress reports
 - o A final summary of field methods at the end of data collection
 - o A full survey dataset with all participant contact information at the close of data collection.

SRO Project Period
Data Col Period
Security Plan
Milestone Dates

01/1996 - 01/1996

NA

PreProduction Start: 09/01/2022
Pretest End:
Staffing Completed: 02/27/2023
SS Train Start: 03/19/2023
DC Start: 03/28/2023

Pretest Start:
Recruitment Start: 02/01/2023
GIT Start:
SS Train End: 03/23/2023
DC End: 09/30/2023

Other Project
Team Members:

In addition to the above:
 Ian Ogden (SSS, Tech Coordinator); Anna Fuqua-Smith (SSI); Austin De Spirito (SSA); Jeff Smith (Tech Lead); Marsha Skoman (SurveyTrak); Heuchun Peng and Shaowei Sun (Self-Scheduler); Peter Sparks & Kelly Liesko (Blaise); Stephanie Windisch and Jennie William (Data Management); Ashwin Dey and Darnell Franklin (Webtrak, Weblog, Reports)

Other Project
Names:

Sample Mgmt Sys

SurveyTrak; Project specific system (Self-Scheduler for Telephone)

Data Col Tool

Blaise 4.8; Other (ArcGIS - Survey 123)

Hardware

Laptop; [UM cell] Phone

DE Software

N/A

QC Recording Tool

DRI-CARI

Incentive

Yes, R; Yes, INF

Administration

SRO Group; Other (PI Payment)

Payment Type

Cash, post (\$10 or \$20 For Dried Blood Spots); Other (\$20 Finders Fee)

Payment Method

Interviewer payment of cash (reimbursed/reconciled via Tenrox)

Report Period

Nov, 2022 (EDC-Endline)

Project Phase

Planning

Risk Level

Some Concerns

Monthly Update

During November 2022, SRC activities on the 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
- Financial
 - o Reviewed monthly project expenses for Midline and Endline. Updated projections and produced reports.
 - o Prepared and delivered estimated costs of development of in-person survey preparation, including programming, hosting, and supplies acquisition
 - o Prepare ballpark estimates for reducing the length of the in-person data collection
 - o Gathered cost information for various items related to dried blood spot collection (shipment costs via various methods, cooler/ice pack costs, etc.)
- Programming/Specification

- o Reviewed/specified further Endline questionnaire edits, provided to programmer
- o Worked with programmers to outline changes to self-scheduler for Endline centralized in-person survey administration.
- o Created testing scenarios for the telephone survey
- o Prepared for in-person testing by Sarah Miller
- ☐ Worked with programmer to specify Inquisit application set up and testing needs for Sarah Miller
- ☐ Prepared interviewer duffle bag with DBS and other supplies
- o Conducted questionnaire testing
 - Production Preparation
- o Drafted initial pre-production schedule, further updated technical schedule
- o Gather information from the SRO Quality Control team regarding options for QC if the project decided to front-load telephone data collection

Task 2: Sampling

- No activity this month

Task 3: Questionnaire Development

- Refined specifications for telephone and in-person instruments
- 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.
- Finalized updates to stand-alone applications for demonstration during in-person meetings; added CORSI block tapping test

Task 5: Systems Programming

- Sample Management Systems
- o Continued editing of SurveyTrak specifications for Endline
- o Conducting initial testing in SurveyTrak
- o Finished archiving EDC Midline databases, reports
- o Defined and prepared preload for SurveyTrak and Blaise applications
- o Prepared testing lines for SurveyTrak and Blaise
- Self-Scheduler
- o Prepared databases for Endline telephone SS testing
- o Continued work on the framework for the Endline centralized in-person self-scheduler
- ☐ Defined draft invitation/reminder schedule
- ☐ Defined disclosure/privacy statements & location to place statements
- o Finalized specification for preload for the telephone self-scheduler; prepared preload for testing.
- Reporting systems
- o Set up initial Webtrak structure for EDC Endline
- o Updated data dictionaries for preload & deliverables

Tasks 6, 7: Interviewer Recruitment & Hiring, Training

- Conducted outreach to conference centers/hotels for training in order to gather quotes for training.
- Prepared summary of quotations for training.
- Negotiated contract with selected conference center

Task 8: Main Data Collection

- Counted and tested Baseline equipment (blood pressure monitors, scales, duffle bags, other small equipment items)

Task 9: Post Collection Processing

- No activity this month

Task 10: Weighting

- No activity this month

Task 11: Final Data Deliverables

- No activity this month

Special Issues

Some concerns due to lack of notification of funding for the in-person data collection.

Approved EDC Endline Work Scope Changes

- Per agreement with ORL, SRO staff continue to work to prepare the Endline in-person survey instruments, although funding is as yet unknown.
- Development of the self-scheduler for the in-person survey centralized sites was halted (Nov 2022).
- The Endline in-person survey launch will be delayed due to uncertainty regarding funding (December 9, 2022).
 - o The March training is being converted to a virtual training for on-staffers. The entire team will work exclusively on the telephone instrument until the (delayed) in-person training.
 - o SRO will schedule an in-person training in May for new-hires and on-staff interviewers who will work on the in-person survey.
 - o SRO will sign a hotel/hosting contract for the May in-person training. ORL understands that it will be committed to paying a penalty for cancellation or change of the contract.
- SRO staff will work in January to purchase supplies for the in-person survey and for kitting. This is necessary in order to accommodate the lead time for kitting (6 to 8 weeks) before the in-person survey launches.

Cost
Dec 19, 2022

Total Cost to Date (Direct + Indirect): 58,731.22

Estimated Cost at Completion (E\$AC): 4,079,398.34

Total Budget: 3,790,320.00

Variance (Budget minus E\$AC): -981,887.34

Reason For Variance:

A large part of the variance is due to indirect cost - indirects appear to be calculating incorrectly. Two months of work on Endline was charged to the Midline budget while shortcodes were set up. Some work is being delayed due to lack of information about NIH funding, which funds the in-person survey.

Projections
Dec 19, 2022

Dollars Projected For Month: 67,862.93

Actual Dollars Used: 53,925.53

Variance (Projected minus Actual): 13,937.40

Reason For Variance:

A decision was made in November to delay some work due to lack of information about NIH funding, which funds the in-person survey. Work on procurement of supplies, and programming the in-person self-scheduler were put on hold.

Measures

	Units Complete	RR	HPI
Current Goal:	2720 Tel, 2023 FTF	91% Tel	3.0 Tel, 7.5 FTF
Goal at Completion:			
Current actual:	n/a	n/a	n/a
Estimate at Complete:			
Variance:			

Other Measures

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

Report Period	Nov, 2022 (EDC-SS Phases 3-4)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	Going slowly, but will not impact the overall budget.		
Special Issues	None		

Cost
Dec 07, 2022

Total Cost to Date (Direct + Indirect): 258,648.19
Estimated Cost at Completion (E\$AC): 325,193.63
Total Budget: 408,935.00
Variance (Budget minus E\$AC): 83,741.37
Reason For Variance: see previous months

Projections
Dec 07, 2022

Dollars Projected For Month: 32,481.38
Actual Dollars Used: 26,726.64
Variance (Projected minus Actual): 5,754.74
Reason For Variance: fewer iwer/project team hours due to lower than projected production

Measures

	Units Complete	RR	HPI
Current Goal:	120	95	5.0
Goal at Completion:	120	95%	7.0
Current actual:	79	65	7.0
Estimate at Complete:	120	95	7.0
Variance:			2.0

Other Measures

Project Name (HCAP 2022) Healthy Cognitive Aging Project, 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

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

Other Project 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: Harmonized Cognitive Assessment Protocol

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 Nov, 2022 (HCAP 2022) **Project Phase** Implementing

Risk Level On Track

Monthly Update HCAP production has been underway for 20 weeks and is going well. As of this morning, 1,647 interviews have been completed, including 936 R and 711 Inf. There are currently 144 appts (92R, 52Inf). The overall HPI is 4.61. It

increased when new lwers started working after the October training but has continued to decrease each week. There are currently 30 interviewers on staff. The on-staffer who left Oct training due to severe illness is now working again from home. She has not yet been approved to leave home, so she has been following up with hard-to-reach informants and also doing inf iws by phone. We will work to get her trained on administering interviews when she is approved to leave home, as her TL only lives one hour away. 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 lwer while checking the form. We are also starting additional QC on the Constructional Praxis task, re-coding the last 3 ea lwer has completed, then comparing Ann Arbor staff coding to lwer coding. Additional areas for both BM/LM and Constructional Praxis training may be identified and this would be done via conference call or over a special Zoom training. 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. Spanish interviews have begun and 12 have been completed (8R, 4Inf). 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 lwer 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) lwer rates have increased since pre-2020. We are documenting these factors that could lead to an overrun once costs are projected using accurate lwer 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
Dec 07, 2022**

Total Cost to Date (Direct + Indirect):	1,740,542.30
Estimated Cost at Completion (E\$AC):	4,292,170.05
Total Budget:	4,488,000.00
Variance (Budget minus E\$AC):	195,829.95
Reason For Variance:	lwer hours are not all accounted for due to a budget cap when the budget was developed.

**Projections
Dec 07, 2022**

Dollars Projected For Month:	365,018.04
Actual Dollars Used:	396,737.90
Variance (Projected minus Actual):	-31,719.86
Reason For Variance:	lwer hours were over from what was projected on original budget. Hours were cut when budget was originally presented due to budget cap while goals were not adjusted.

Measures

	Units Complete	RR	HPI
Current Goal:	1600		
Goal at Completion:	7060	76%	
Current actual:	1647	23%	4.6
Estimate at Complete:		76%	
Variance:			

Other Measures

Goals and actuals include R + Inf iws.

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: 13,982,815.00	Indirect Budget: 5,033,815.00	Total Budget: 19,016,630.00										
Principal Investigator/Client	David Weir (ISR-SRC)												
Funding Agency													
IRB	HUM#: HUM000611128	Period Of Approval:	9/8/2021 to 9/7/2022										
Project Team	Project Lead: Evanthia Leissou Budget Analyst: Richard Warren Krause Production Manager: Andrea Sims Senior Project Advisor: Nicole G Kirgis Production Manager: Deborah Zivan Production Manager: Jennifer C Arrieta												
Proposal #:	no data												
Description:	<p>The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.</p>												
SRO Project Period	01/2021 - 05/2023												
Data Col Period	03/2022 - 04/2023												
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%;"> <tr> <td>PreProduction Start: 01/01/2021</td> <td>Pretest Start: 11/01/2021</td> </tr> <tr> <td>Pretest End: 11/23/2021</td> <td>Recruitment Start: 08/01/2021</td> </tr> <tr> <td>Staffing Completed: 01/15/2022</td> <td>GIT Start: 02/21/2021</td> </tr> <tr> <td>SS Train Start: 02/23/2022</td> <td>SS Train End: 03/03/2022</td> </tr> <tr> <td>DC Start: 03/07/2022</td> <td>DC End: 07/31/2023</td> </tr> </table>			PreProduction Start: 01/01/2021	Pretest Start: 11/01/2021	Pretest End: 11/23/2021	Recruitment Start: 08/01/2021	Staffing Completed: 01/15/2022	GIT Start: 02/21/2021	SS Train Start: 02/23/2022	SS Train End: 03/03/2022	DC Start: 03/07/2022	DC End: 07/31/2023
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SS Train Start: 02/23/2022	SS Train End: 03/03/2022												
DC Start: 03/07/2022	DC End: 07/31/2023												
Other Project Team Members:	<p>Derek Dubuque (Production Manager), Andrea Sims (Production Manager), Theresa Camello (Production Manager), Taghraid 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), Austin De Spirito (Project Assistant)</p> <p>Tech Team: Karl Dinkelmann, Jeff Smith, Jim Rodgers, Laura Yoder, Marsha Skoman, Ashwin Dey, Pam Swanson, David Bolt, Deb Wilson, Jennie Williams, Rose Zybdel, Stephanie Windisch, Heather Schroeder, Holly Ackerman, Shane Empie, Kelly Chatain</p>												
Other Project Names:													
Sample Mgmt Sys	SurveyTrak; MSMS												
Data Col Tool	Blaise 5												
Hardware	Laptop; [UM cell] Phone; Paper and Pencil												
DE Software	Other (Blaise 5 Coding Application); External vendor (DataForce Scanning SAQs)												
QC Recording Tool	Camtasia												
Incentive	Yes, R; Yes, INF												
Administration	NA												
Payment Type	Check, prepaid (80.00); Check, post (\$50 (WBD), \$20 (SAQ))												
Payment Method	Check through STRak RPay System; Check through other system (Rpay system set up for MSMS); Interviewer p												
Report Period	Nov, 2022 (HRS 2022 Panel)												
Project Phase	Implementing												

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

Throughout the month of November,

- Interviewer's were instructed to focus two call windows per week on screening to ensure the majority of their weekly hours were spent on main interviews in order to be able to finish panel in the summer of 2023.
- 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.
- Technical development continued with SurveyTrak, Weblog, WebTrak, MSMS, and reports.
- Limited effort protocol was designed in consultation with HRS staff to be implemented early December.
- The remainder of the web panel sample was released (n=2,635) into MSMS.
- Datamodels 1 & 2 suspends (n=180 households) migration process began in effort to return the cases to the field.
- Measures table below now incorporates all Panel iws (lwer Administered and Web Self lws) as of 12/16/22

Special Issues

- Panel interviewing currently expected to require an additional three months of field time due to current interviewer count and balancing effort with new cohort screening/baseline iws.
- Multiple Blaise issues that have impacted STrak and MSMS throughout data collection.

Cost**Dec 16, 2022**

Total Cost to Date (Direct + Indirect): 11,391,985.20
Estimated Cost at Completion (E\$AC): 19,028,541.49
Total Budget: 19,016,630.00
Variance (Budget minus E\$AC): -11,911.49
Reason For Variance:

CRS is projecting the contingent fringe benefits with the newly approved 10.4% rate to accommodate ACA costs, the \$400 signing bonus for field staff, Field interviewer and SurveyTech base rate increase, an extra day added to February production training, the increase in per mile reimbursement for travel. CRS is now using the actual lwer rates for projecting lwer costs and travel projections were removed from the recruitment task. The Casic recharge rate and Field Ops rate increases, increased mileage costs for remaining interviews, the Field lwer and SurveyTech rate increases have been updated in CRS, the increase in recharges to the lwer-Trainee hours as well as the reduction in the CAPI rat. The additional interviewer hours needed to reach panel goal have been applied to CRS.

Projections
Dec 16, 2022

Dollars Projected For Month: 896,107.11
Actual Dollars Used: 794,943.28
Variance (Projected minus Actual): 101,163.83
Reason For Variance:

November salary costs were significantly under projections primarily due to interviewer hours. Non-salary costs were also under projections due to unused costs for training, advertising and travel. These costs were pushed forward to future months.

Measures

	Units Complete	RR	HPI
Current Goal:	10,250	48%	8.5
Goal at Completion:	16,266	74.0%	9.0
Current actual:	9,911	47%	8.4
Estimate at Complete:	16,266	74.0%	10.9
Variance:	0	0	1.9

Other Measures

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:** 67,762.90 **Indirect Budget:** 24,394.16 **Total Budget:** 92,157.06

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 HRS Historical Coding

Names:

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

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

Risk Level On Track

Monthly Update During the month of November,

- Stan completed the crosswalk work scope and delivered the data to HRS staff.
- The PI requested assistance with managing the HRS staff's work scope (@6 hours a week for 25 weeks) in light of the Co-PI having left UofM. The cost estimate for additional work scope was approved by the PI and has been added to the SRO budget.
- Jeannie Baker has been assigned to manage the project with Jen Arrieta as the SPA.
- There was an initial meeting with Jeannie, Jen and the PI to introduce Jeannie to the project and discuss work scope.

Special Issues

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

Cost
Dec 08, 2022

Total Cost to Date (Direct + Indirect):	9,931.21
Estimated Cost at Completion (E\$AC):	92,095.73
Total Budget:	92,157.06
Variance (Budget minus E\$AC):	61.33
Reason For Variance:	Minimal variance projected.

Projections
Dec 08, 2022

Dollars Projected For Month:	1,803.40
Actual Dollars Used:	1,436.38
Variance (Projected minus Actual):	367.02
Reason For Variance:	Change in management of the project from Survey Director Jen Arrieta to Documentation Specialist Jeannie Baker accounts for the variance.

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: 3		
Project Type	Sponsored Projects	Project Status	Current		
Budget	Direct Budget: 21,264,149.00	Indirect Budget: 7,655,093.00	Total Budget: 28,919,242.00		
Principal Investigator/Client	David Weir (SRC) Helen Levy (SRC) Ken Langa (SRC)				
Funding Agency					
IRB	HUM#:	Period Of Approval:			
Project Team	Project Lead:	Evanthia Leissou			
	Budget Analyst:	Richard Warren Krause			
	Production Manager:				
	Senior Project Advisor:	Nicole G Kirgis			
	Production Manager:	Andrew L Hupp			
	Production Manager:				
Proposal #:	no data				
Description:	<p>The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample.</p>				
SRO Project Period	02/2021 - 01/2024				
Data Col Period	03/2022 - 01/2024				
Security Plan	NA				
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: 04/19/2022 </td> <td style="padding: 5px;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>			PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: 04/19/2022	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: 04/19/2022	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:				
Other Project Team Members:					
Other Project Names:					
Sample Mgmt Sys	SurveyTrak; MSMS; Other ((Blaise) Case Management App (CMA))				
Data Col Tool	Blaise 5				
Hardware	Laptop; [UM cell] Phone; Paper and Pencil				
DE Software	Other (Blaise 5 web instrument); N/A				
QC Recording Tool	Camtasia; N/A				
Incentive	Yes, R; Yes, INF				
Administration	SRO Group				
Payment Type	Check, post; Cash, prepaid (\$2); Cash, post				
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest C				

Report Period	Nov, 2022 (HRS2022-Screening)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	<p>Cases continue to be flagged for the follow-up protocol. 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 follow-up 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 (their 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.</p>		

A document detailing the follow-up procedure can be found here.

https://docs.google.com/spreadsheets/d/1aPZW0VSaYxJXAxJA1okgYAHR1_vWyDhEj-lqvDnxro/edit#gid=0

Interviewing focus has shifted to the panel. Screening sample has been consolidated with a subset of interviewers and is being overseen by Theresa and Millie (the TL's are also focusing on panel). Interviewers are to be working two call windows per week. Those working have been meeting the lowered goals.

The next training (February) has the goal of recruiting 40 people to exclusively screen. A larger training of at least 120-140 is planned for April. The SRO and sampling team are currently trying to figure out how many staff we need to meet the targets to complete the study.

Release 4 (~12,000) is planned for early January (2023).

IRB: An amendment is planned for December. It may contain screening revisions/updated.

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.

Special Issues

Cost
Dec 12, 2022

Total Cost to Date (Direct + Indirect):	6,935,191.99
Estimated Cost at Completion (E\$AC):	28,896,353.24
Total Budget:	28,919,242.00
Variance (Budget minus E\$AC):	22,888.76
Reason For Variance:	Updating projections to be more in line with actuals from the field.

Projections
Dec 12, 2022

Dollars Projected For Month:	1,174,061.39
Actual Dollars Used:	620,899.14
Variance (Projected minus Actual):	553,162.25
Reason For Variance:	--Staff hours in November were lower than projections by ~76% (~\$87,500).

Measures

	Units Complete	RR	HPI
Current Goal:	3,600/1,500 HHs	73%	3.0
Goal at Completion:			
Current actual:	883/848	30.5%	4.02
Estimate at Complete:			
Variance:			

Other Measures

Project Name	(IHDS3) India Human Development Survey Wave 3					
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 2			
Project Type	Sponsored Projects	Project Status	Current			
Budget	Direct Budget: 358,900.61	Indirect Budget: 200,983.92	Total Budget:	559,884.53		
Principal Investigator/Client	Sonalde Desai (University of Maryland) Stephanie Chardoul (University of Michigan) Santanu Pramanik (National Council of Applied Economic Research)					
Funding Agency	National Institutes of Health, Department of Health and Human Services					
IRB	HUM#:	Period Of Approval:				
Project Team	Project Lead:	Sarah Elisa Broumand				
	Budget Analyst:	Ryan Neice				
	Production Manager:					
	Senior Project Advisor:	Stephanie A Chardoul				
	Production Manager:	Sarah Elisa Broumand				
	Production Manager:	Sarah Elisa Broumand				
Proposal #:	no data					
Description:	The India Human Development Survey (IHDS) is a nationally representative, multi-topic, longitudinal survey of 41,554 households in 1503 villages and 971 urban neighborhoods across India. The first round of interviews were completed in 2004-5; data are publicly available through ICPSR. A second round of IHDS reinterviewed most of these households in 2011-12 (N=42,152). SRC joins IHDS Wave 3 to automate data collection, the scope of work includes methodological design, sample design, questionnaire design, technical instrument design, supervisor/interviewer training, production monitoring, quality control, data dissemination, and 2-3 weekly conference calls for capacity building.					
SRO Project Period	01/2019 - 03/2024					
Data Col Period	05/2022 - 10/2023					
Security Plan	NA					
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="width: 50%; vertical-align: top;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>				PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:					
Other Project Team Members:	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	Nov, 2022 (IHDS3)	Project Phase	Implementing
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Risk Level	<i>Some Concerns</i>
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Monthly Update	<p>Continue working on finalizing Kannada and Gujarati translations. Concern continues because clients continued to make translation changes expending hours from the SRO team. We had to recruit a new programmer to help cover the load of work with these translations. Also, we had to continue to spend time finishing up doing all the merge/migrations for all these data models. We had discovered a bug that was introduced by us in one of the data models which unfortunately required additional Data Manager time to fix data for hundreds of records across 3 agencies. We expect to be done with the fix by December.</p>
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As a result of this, we have a higher overrun.

To mitigate these 2 issues we did the following:

1. NCAER Blaise programmers are helping with entering the translation text into the data models. The plan is that in January they will be doing most of this work and we will reduce the SRO support.
2. For this particular batch of translations, we agreed with the client that we would not release any interim versions between the first release and the final release into PROD to any of the PROD interviewers. This in turn, will reduce the number of merges that will be needed to be set up later in January.
3. 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.

Special Issues

Cost		
Dec 07, 2022	Total Cost to Date (Direct + Indirect):	505,331.90
	Estimated Cost at Completion (E\$AC):	571,368.01
	Total Budget:	559,884.53
	Variance (Budget minus E\$AC):	-11,483.00
	Reason For Variance:	Additional Blaise programmer work was required to finish up all the translation work. The original plan was that NCAER was going to do this task, but the Blaise BTT application had issues that prevented us from using it, forcing us to have to do the work instead. Since then NCAER have acquired 2 Blaise licenses and we have been training them to do the translations directly with the Blaise code. This will help mitigate any additional increases to the budget.

Projections		
Dec 07, 2022	Dollars Projected For Month:	31,384.96
	Actual Dollars Used:	33,570.64
	Variance (Projected minus Actual):	-2,185.68

Reason For Variance:

The work in November required a lot more time then originally expected. Jennie had to put additional hours to fix data related to the Marriage and Fertility data model bug. And we had to recruit David Dybiki to help getting the Data Model translations done. Hours have been reduced for future months to mitigate the increase.

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

Other Measures

Project Name	(MI CReSS (Year 3)) 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:	309,813.00	Indirect Budget:	80,551.00	Total Budget: 390,364.00		
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:	<p>MI CReSS is a partnership between the University of Michigan School of Public Health (SPH) and the Michigan Department of Health and Human Services. It is a public health surveillance study to learn about Michiganders' experiences with COVID-19 using a representative sample of confirmed cases within the state. Using survey data, they plan to document sociodemographic inequities in COVID-19 testing, treatment, and recovery.</p> <p>SRO's involvement includes the administration of a Follow-up survey for respondents that completed a Baseline survey with the SPH team. Based on the sample information provided, we will be re-contacting approximately 3,995 respondents who have already completed (or are estimated) to complete the Baseline survey to administer the Follow-up survey.</p> <p>The Follow-up survey is estimated to be 45 minutes in length, and Respondents will be encouraged to complete the survey by web. However, SRO Interviewers will contact non-responders and conduct the interview over the telephone if the Respondents do not want to complete the survey on the web.</p>						
SRO Project Period	08/2021 - 09/2023						
Data Col Period	01/2022 - 07/2023						
Security Plan	NA						
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: 11/29/2021 DC Start: 01/26/2022 </td> <td style="padding: 5px;"> Pretest Start: Recruitment Start: 09/16/2021 GIT Start: SS Train End: 12/02/2021 DC End: 07/07/2023 </td> </tr> </table>					PreProduction Start: Pretest End: Staffing Completed: SS Train Start: 11/29/2021 DC Start: 01/26/2022	Pretest Start: Recruitment Start: 09/16/2021 GIT Start: SS Train End: 12/02/2021 DC End: 07/07/2023
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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 Deb Wilson: Help Desk						

Other Project**Names:**

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

Report Period Nov, 2022 (MI CReSS (Year 3)) **Project Phase** Implementing

Risk Level On Track

Monthly Update Sample replicate 10 was released as planned.
We received confirmation that the funding for the addition of releases 15 and 16 has been approved.

Special Issues

Cost

Total Cost to Date (Direct + Indirect):	68,288.39
Estimated Cost at Completion (E\$AC):	390,426.29
Total Budget:	390,364.00
Variance (Budget minus E\$AC):	-62.29
Reason For Variance:	And additional \$1,500 were approved by PI for adding additional question in January. The overrun is due to these hours being added to the projections.

Projections

Dollars Projected For Month:	67,145.28
Actual Dollars Used:	53,184.51
Variance (Projected minus Actual):	13,960.77
Reason For Variance:	The Variance is due to incentive payments not distributed as planned. These have been moved to the next month. Also some lwer hours were lower than expected, these have been spread to future months.

Measures	Units Complete		RR	HPI
	Current Goal:	3,225 (Rel 1-11)	80% (60%-Web/40%Tel)	2.25
	Goal at Completion:		80% (60%-Web/40%Tel)	
	Current actual:	2,417	69% (67%-Web/33% Tel)	4.38
	Estimate at Complete:			
	Variance:			

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

2689	Y2 Sample
2152	80% RR Rate
1292	60% Web
860	40% Phone
2.25	HPI Telephone
0.25	HPI Web Reminder

Project Name	(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027											
Project Mode	Primary: Class SAQ Total of Modes: 1											
Project Type	Sponsored Projects		Project Status	Current								
Budget	Direct Budget:	6,267,988.00	Indirect Budget:	3,510,072.00 Total Budget: 9,778,060.00								
Principal Investigator/Client	Richard Miech (SRC)											
Funding Agency	National Institute on Drug Abuse, one of the National Institutes of Health.											
IRB	HUM#:	00217920	Period Of Approval:	from 7/20/22 No CR								
Project Team	Project Lead:	Rebecca Gatward										
	Budget Analyst:	Dean E Stevens										
	Production Manager:	Margaret Lavanger										
	Senior Project Advisor:	Gregg Peterson										
	Production Manager:	James Koopman										
	Production Manager:											
Proposal #:	no data											
Description:	<p>Since 1975 the MTF survey has measured drug and alcohol use and related attitudes among adolescent students nationwide. A nationally representative sample of survey participants report their drug use behaviors across three time periods: lifetime, past year, and past month. The survey is funded by the NIDA, a component of the National Institutes of Health (NIH), and conducted by the University of Michigan.</p> <p>It is based on two interconnected series of surveys using nationally representative samples:</p> <p>(a) self-administered annual in-school surveys of 8th, 10th, and 12th graders (~45,000) in 400 schools. Proctors (SRO interviewers) coordinate and administer the data collection in schools (either FTF or remotely without visiting the schools).</p> <p>(b) panels of high school graduates aged 19-30, 35, 40,45, 50, 55, and 60 (now primarily surveyed by web). Panel members aged 19-30 are invited to participate every other year/asked to complete a web survey and the older sample members are sent questionnaires (mail and web) at five-year interval. The MTF panel study has three parts - early in the year a newsletter is mailed to panel members. If the newsletter is returned (undelivered) locating effort targets these panel members and others who have not participated for X years. The web panel launches (web) in spring and in around June a telephone non-response effort begins for those invited to participate. The panel members are recruited from the 12th graders who participate in the base year study. Press releases and published results can be found here.. http://www.monitoringthefuture.org/</p>											
SRO Project Period	04/2022 - 03/2027											
Data Col Period	04/2022 - 03/2027											
Security Plan	Yes											
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center; vertical-align: top;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="width: 50%; text-align: center; vertical-align: top;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>				PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:						
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:											
Other Project Team Members:	<table border="0" style="width: 100%;"> <tr> <td style="width: 50%;">Hueichun Peng</td> <td style="width: 50%;">Technical Lead (WebSMS programmer)</td> </tr> <tr> <td>Brad Goodwin</td> <td>Data Management (Minako is providing support)</td> </tr> <tr> <td>Ashwin Dey</td> <td>SurveyTrak, WebTrak and MTF specific Apps. Programmer</td> </tr> <tr> <td>Kyle Goodman and Deborah Wilson</td> <td>Help Desk/Tablet support</td> </tr> </table>				Hueichun Peng	Technical Lead (WebSMS programmer)	Brad Goodwin	Data Management (Minako is providing support)	Ashwin Dey	SurveyTrak, WebTrak and MTF specific Apps. Programmer	Kyle Goodman and Deborah Wilson	Help Desk/Tablet support
Hueichun Peng	Technical Lead (WebSMS programmer)											
Brad Goodwin	Data Management (Minako is providing support)											
Ashwin Dey	SurveyTrak, WebTrak and MTF specific Apps. Programmer											
Kyle Goodman and Deborah Wilson	Help Desk/Tablet support											

Other Project

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

Report Period	Nov, 2022 (MTF Base Year 2022_27)	Project Phase	Implementing
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Risk Level	On Track
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Monthly Update	<p>November 2022</p> <ul style="list-style-type: none"> - Preparing for training and production launch in January. (Training materials, System updates, contributing to IRB application...) - work continued on decommissioning ~6,400 tablets ready to be sent to UM property dispo. (these are being replaced by a smaller number of new tablets). - the temps. and Help Desk also began work on preparing the new tablets (1100) for production (unpacking, asset tagging, running updates) - they will be configured in December. - Staffing plan confirmed - 28 IWERs, 4 TLs. We were aiming for 40 IWERs, however, as the number of schools recruited by the MTF Research Team is lower (at this point) than in previous year, having fewer interviewers is not such an issue. Although there are more schools that will need overnight travel trips to conduct the surveys.
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Special Issues

Cost		
Dec 07, 2022	<p>Total Cost to Date (Direct + Indirect):</p> <p>Estimated Cost at Completion (E\$AC):</p> <p>Total Budget:</p> <p>Variance (Budget minus E\$AC):</p> <p>Reason For Variance:</p>	<p>786,816.96</p> <p>8,927,020.47</p> <p>9,778,060.00</p> <p>851,039.53</p> <p>Current projections result in an underspend of \$851,040 for the five year grant period.</p> <p>Projections for the five year period are based on current scope of work and the adapted protocol (introduced in 2021). The budget prepared for the proposal was based on the pre-pandemic design. The adapted protocol brings savings in the following categories: interviewer hours, travel, shipping and staff time (specifically hours required for loading and preparing tablets for shipping). For the past few years the number of schools recruited and passed to SRO has been lower than the number on which the budget is based (n=390), we have continued to base projections on achieving survey administrations in 390 schools.</p> <p>Wave 1 (2023)</p> <ul style="list-style-type: none"> - Projections for wave 1 (2023) onwards include the higher per diem and mileage rate (both were updated July 1). Hours per school survey administration are based on actuals from 2022 and assume 30% of survey administrations will be conducted remotely i.e. SRO interviewer will not visit the school to proctor the survey administration in person. - We have increased staff time (marginally) to prepare for the small pilot (six schools) to test methods to increase cooperation from 12th grade students to provide contact details. <p>** the estimate of 70% FTF, 30% remote school was made a few months ago - we are going into production aiming for all schools to be conducted FTF. I will update projections for interviewer hours based on achieving 90% FTF, 10 Remote. We may also add some hours and expenses for FTF school recruitment trips that SRO has been asked to help with (given the lower response than is usual at this point, it is hoped that FTF visits may boost recruitment).</p>

Projections
Dec 07, 2022

Dollars Projected For Month: 113,326.65
Actual Dollars Used: 116,672.50
Variance (Projected minus Actual): -3,345.85
Reason For Variance: Variance is fairly small and can be accounted for by fewer hours being charged by Hueichun than projected.

Measures

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

Other Measures

Project Name	(MTF HID 22) MTF High Intensity Drinking 2022				
Project Mode	Primary: Web Total of Modes: 1				
Project Type	Sponsored Projects	Project Status	Current		
Budget	Direct Budget: 301,160.00	Indirect Budget: 167,822.00	Total Budget: 468,982.00		
Principal Investigator/Client	Megan Patrick (University of Michigan)				
Funding Agency					
IRB	HUM#: 00159183	Period Of Approval:	2/2/2022		
Project Team	Project Lead: Donnalee Ann Grey-Farquharson Budget Analyst: Parina Kamdar Production Manager: Hongyu Johnson Senior Project Advisor: Kirsten Haakan Alcser Production Manager: Production Manager:				
Proposal #:	no data				
Description:	2022 will be Wave 4 Data Collection. SRO's work on this project includes administering multiple web surveys to a sample of respondents who participated as 12th graders in Monitoring the Future's (MTF) Base Year study. Using a starting sample of approximately 2000 respondents from MTF, SRO will administer a data collection "burst" consisting of one 30-minute survey and 14 days of 7-minute surveys every 12 months for 4 years. SRO will conduct all surveys as self-administered web surveys, with no telephone contact to respondents. SRO will coordinate all electronic contact with respondents (email and text message), but will not handle any paper mailings, respondent management or the payment of respondent incentives. SRO's activity will start in November 2021, with the first data collection burst in February 2022, lasting through to the third week of April 2022. Deliverables include final copies of the questionnaires (including programming source code), clean and documented data sets from each of the data collection bursts, and a methodological report on protocols.				
SRO Project Period	10/2021 - 07/2022				
Data Col Period	02/2022 - 04/2022				
Security Plan	NA				
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start: </td> <td style="padding: 5px;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </td> </tr> </table>			PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:
PreProduction Start: Pretest End: Staffing Completed: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:				
Other Project Team Members:	Kirsten Alcser, Donnalee Grey-Farquharson, Hueichun Peng, Hongyu Johnson, Minako Edgar				
Other Project Names:					
Sample Mgmt Sys	Web SMS				
Data Col Tool	Illume				
Hardware	NA				
DE Software	NA				
QC Recording Tool	NA				
Incentive	Yes, R				
Administration	ISR Group (MTF Study Satff)				
Payment Type	Check, post (varies \$40 - \$100); Other (Tango Card)				
Payment Method	Imprest Cash Fund from ISR Business Office; Other (Tango Card)				

Report Period	Nov, 2022 (MTF HID 22)	Project Phase	Closing
Risk Level	On Track		
Monthly Update	The data collection ended in April 2022. The final dataset has been delivered. The project staff mainly worked on		

post-data collection activities including documentation. This will be wrapped-up in December 2022.

Data Collection - Production ended in April 2022.

Type	Details	Total sample	Total started (partial)	Total Completes	% (Completes
Annual	Annual	1108	22	743	67.06
Diary	D_1	743	3	668	89.91
Diary	D_2	743	5	638	85.87
Diary	D_3	743	8	605	81.43
Diary	D_4	743	8	604	81.29
Diary	D_5	743	11	595	80.08
Diary	D_6	743	7	591	79.54
Diary	D_7	743	6	579	77.93
Diary	D_8	743	6	577	77.66
Diary	D_9	743	10	555	74.7
Diary	D_10	743	6	545	73.35
Diary	D_11	743	6	557	74.97
Diary	D_12	743	17	564	75.91
Diary	D_13	743	7	537	72.27
Diary	D_14	743	11	521	70.12

Special Issues

Cost
Nov 30, 2022

Total Cost to Date (Direct + Indirect):	338,671.24
Estimated Cost at Completion (E\$AC):	342,852.03
Total Budget:	468,982.00
Variance (Budget minus E\$AC):	126,129.97
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.

Projections
Nov 30, 2022

Dollars Projected For Month:	3,165.10
Actual Dollars Used:	1,330.12
Variance (Projected minus Actual):	1,834.98
Reason For Variance:	Work completed with less effort than expected.

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 Nov, 2022 (MTF Panel 2022-27) **Project Phase** Implementing

Risk Level On Track

Monthly Update Management

- Final data was delivered
- reviewing Web SMS specification documentation
- continue to work on documentation

- Provided Timeline to Study Staff for 2023 preproduction and data collection

System

Work with the SRO team staff on issues/refinement items in RLM. The majority of these updates have been programmed and tested and are ready to be implemented in 2023 WL and NR calling.

Data Collection

-The current 2022 wave of Production started in April 2022 and ended in October 2022.

Replica	Panel	Total Case	Completes	%	Partial	%	SAQ Completes	%
1	12EVEN	3156	1171	37.1	75	2.38	156	4.94
2	12EVEN	3179	1271	39.98	75	2.36	129	4.06
3	12EVEN	3167	1230	38.84	89	2.81	114	3.6
4	AGE35	1231	684	55.56	24	1.95	111	9.02
4	AGE40	1167	644	55.18	17	1.46	148	12.68
5	AGE45	1213	700	57.71	18	1.48	181	14.92
5	AGE50	1133	665	58.69	17	1.5	172	15.18
6	AGE55	1219	692	56.77	15	1.23	233	19.11
6	AGE60	1410	764	54.18	15	1.06	389	27.59
7	12EVEN	833	333	39.98	24	2.88	9	1.08
All	All	17708	8154	46.05	369	2.08	1642	9.27

Final Numbers:

17708 sample was fielded, of those there were 8136 web completes (45.95%), 286 web partials (1.62%), and 1642 SAQs(9.27%) for an overall 56.67 RR. Clearly the web mode is extremely successful with only a small percentage of the sample opting for paper.

Special Issues

Cost
Nov 30, 2022

Total Cost to Date (Direct + Indirect):	545,381.84
Estimated Cost at Completion (E\$AC):	3,943,749.95
Total Budget:	3,895,217.00
Variance (Budget minus E\$AC):	-48,532.95
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
Nov 30, 2022

Dollars Projected For Month:	31,612.36
Actual Dollars Used:	17,141.68
Variance (Projected minus Actual):	14,470.68
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	(PR-PSID) Puerto Rico Panel Study of Income Dynamics																								
Project Mode	Primary: Face to Face		Secondary: Telephone	Total of Modes: 2																					
Project Type	Sponsored Projects			Project Status	Current																				
Budget	Direct Budget:	828,581.00	Indirect Budget:	464,004.00	Total Budget: 1,292,585.00																				
Principal Investigator/Client	Narayan Sastry (University of Michigan) Elizabeth Fussel (Brown University)																								
Funding Agency	NICHD, with supplemental funding being sought from NIA																								
IRB	HUM#:	HUM00197300	Period Of Approval:	4/5/2022-4/4/2023																					
Project Team	Project Lead:	Shonda R Kruger-Ndiaye																							
	Budget Analyst:	Ivanna Iavorska-Em																							
	Production Manager:																								
	Senior Project Advisor:	Stephanie A Chardoul																							
	Production Manager:	Camila Kendall																							
	Production Manager:																								
Proposal #:	no data																								
Description:	SRO will work with the PIs and a local survey firm in Puerto Rico, Estudios Técnicos (ETI), to develop a sample frame, sample design, questionnaire and data collection protocols for both pilot data collection (in 2022) and baseline data collection (in 2023). DMSS will provide assistance with sample design and implementation, responsive design, panel maintenance issues, and creation of sample weights. SRO will update the PSID-21 Spanish instrument for use specifically in PR. SRO will assist with the preparation of training materials for Listing training, Pretest and Main Data collection and will travel to PR to be on-site for these trainings. SRO will define reports for production and quality control monitoring that will be programmed through the SurveyTrak system, and train the research team on using these reports. All data will be collected by ETI's interviewers in PR and will be encrypted and transmitted daily via SurveyTrak to a secure SRC server. SRO will also assist with data processing.																								
SRO Project Period	01/2022 - 12/2023																								
Data Col Period	NA																								
Security Plan																									
Milestone Dates	<table><tr><td>PreProduction Start:</td><td>10/01/2021</td><td>Pretest Start:</td><td></td></tr><tr><td>Pretest End:</td><td></td><td>Recruitment Start:</td><td></td></tr><tr><td>Staffing Completed:</td><td></td><td>GIT Start:</td><td></td></tr><tr><td>SS Train Start:</td><td></td><td>SS Train End:</td><td></td></tr><tr><td>DC Start:</td><td></td><td>DC End:</td><td>12/31/2023</td></tr></table>					PreProduction Start:	10/01/2021	Pretest Start:		Pretest End:		Recruitment Start:		Staffing Completed:		GIT Start:		SS Train Start:		SS Train End:		DC Start:		DC End:	12/31/2023
PreProduction Start:	10/01/2021	Pretest Start:																							
Pretest End:		Recruitment Start:																							
Staffing Completed:		GIT Start:																							
SS Train Start:		SS Train End:																							
DC Start:		DC End:	12/31/2023																						
Other Project Team Members:	Marsha Skoman--Tech Lead Raphael Nishimura--Sampling																								
Other Project Names:																									
Sample Mgmt Sys	SurveyTrak																								
Data Col Tool	Blaise 4.8																								
Hardware	Laptop																								
DE Software	N/A																								
QC Recording Tool	Camtasia																								
Incentive	Yes, R; Yes, INF																								
Administration	Other (ETI (Puerto Rican Survey Firm))																								
Payment Type	Check, post (Varies by study phase); Cash, post (Varies by study phase)																								
Payment Method	Other (Via ETI Systems)																								

Report Period	Nov, 2022 (PR-PSID)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	SRO worked to define scope of the technical translations needed as it relates to the Blaise programming. SRO also prepared GIT training materials for translation. PSID staff prepared sole source documentation for the PR translation company.		

Continued discussing plan for instrument development. PSID Staff and Core Pls were not on board with the plan to incorporate the PR-PSID content into the Core instrument. Pls and SRO met with Blaise programmer and discussed options. Current proposal is to begin the PR programming with a copy of the Core instrument in the Spring 2023 (when Spanish CATI is Stable). PR technical translation would kick off at this point as well. The Blaise programmer will work in a separate PR copy of the instrument and incorporate all PR content and updates. In late 2023-early 2024, the PR programmer would incorporate PR content into the Core instrument in a version never fielded on Core in 2023.

Began thinking through reporting needs for main data collection -- Project lead met with data manager and Sarah B to discuss reporting on international projects.

Listing:

--DMSS worked to create offline Field Maps projects for segments where students were unable to access the Online Maps. DMSS also worked to address issue with offline maps not downloading.

--Tony R is helping DMSS with listing QC via WebTrak.

--PR Pls let SRO know that 1 lister had quit, and they were hiring two more. DM assigned new listers sample.

--Help Desk shipped 5 additional laptops to PR to serve as backups.

--DMSS received request to sub-select the largest block that had more than 2,300 HUs. Raphael created 2 sub-segments and randomly selected one for listing.

--PR Pls reported that listers have not been able to gain access to some gated communities. Pls are working to reach out to the administrators of these gate communities to gain access.

--Despite numerous reminders, there have been issues with PR staff completing timely send/receives. Two laptops were bricked. 4 additional laptops (extra laptops held by Pls) almost bricked but were connected to the security software just in time.

--Listing production continues at a pace that suggests that completion in mid-February.

Special Issues

Work scope for Spanish translations was underbudgeted (U-M, non-SRO budget).

**Cost
Dec 13, 2022**

Total Cost to Date (Direct + Indirect):	174,682.84
Estimated Cost at Completion (E\$AC):	1,266,209.48
Total Budget:	1,292,585.00
Variance (Budget minus E\$AC):	26,375.52
Reason For Variance:	Decrease in projected costs due to reduction in unnamed SSI hours and (smaller) reduction in programmer hours.

**Projections
Dec 13, 2022**

Dollars Projected For Month:	52,457.82
Actual Dollars Used:	27,996.20
Variance (Projected minus Actual):	24,461.62
Reason For Variance:	Underrun mainly due to salary tech categories as there were significant projections for Blaise programming, and Main Data Collection (MDC) data manager -- tech work for MDC has not yet begun.

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	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> PreProduction Start: 04/01/2022 Pretest End: Staffing Completed: SS Train Start: DC Start: 07/01/2022 </td> <td style="padding: 5px;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 11/30/2022 </td> </tr> </table>			PreProduction Start: 04/01/2022 Pretest End: Staffing Completed: SS Train Start: DC Start: 07/01/2022	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 11/30/2022
PreProduction Start: 04/01/2022 Pretest End: Staffing Completed: SS Train Start: DC Start: 07/01/2022	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 11/30/2022				
Other Project Team Members:	Rachel Orlowski -- PSID Core Lead Karl Dinkelmann -- TSG Lead and Blaise Programming Support Marsha Skoman -- Blaise Programmer Daric Thorne -- MSMS Spec Lead Kyle Goodman -- MSMS Set up Programmer Jim Rodgers -- MSMS Lead Rose Zybel -- Data Manager				
Other Project Names:					
Sample Mgmt Sys	MSMS				
Data Col Tool	Blaise 5				
Hardware	NA				
DE Software	NA				
QC Recording Tool	NA				
Incentive	Yes, R				
Administration	ISR Group (PSID)				
Payment Type	Check, post (\$10); Other (electronic, post--JP Morgan)				
Payment Method	Check through other system (PSID staff will handle check & e-payment via RAPS)				

Report Period	Nov, 2022 (PSID23 Online Contact Upc	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	PSID provided the list of sample eligible for the email reminder on 11/8. Batch email reminder sent 11/9-11/11 (n=7482). Response rate more than doubled after the email reminder was sent.		

PSID provided preload with the Reference Person loaded as Person 1. Due to this preload structure, the email notification was addressed to the Reference Person, and not the PSID respondent. SRO fielded a handful of responses to the email notification from Respondents who received emails addressed to the Reference Person, instead of themselves. A file was created to document these cases, and refusals in response to the email notification for PSID staff.

Two more cases were identified that needed to be reset after the wrong R had tried to access the web form. SRO reset the cases and the data manager automated a daily process to identify any cases that needed to be reset.

Last day of the project is December 15th -- web portal scheduled to be closed first thing December 16th.

Special Issues

Cost
Dec 14, 2022

Total Cost to Date (Direct + Indirect):	44,798.74
Estimated Cost at Completion (E\$AC):	46,513.84
Total Budget:	47,456.00
Variance (Budget minus E\$AC):	942.16
Reason For Variance:	The projected underrun decreased by approximately \$500 due to added projections for management and DM for January debriefing.

Projections
Dec 14, 2022

Dollars Projected For Month:	2,801.72
Actual Dollars Used:	3,298.71
Variance (Projected minus Actual):	-496.99
Reason For Variance:	Incurred programming charges not projected to add users to the project that were covering for Project Lead while OOTO.

Measures

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

Other Measures

Project Name	(PSID23) Panel Study of Income Dynamics Core 2023												
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2										
Project Type	Sponsored Projects	Project Status	Current										
Budget	Direct Budget: 5,030,748.00	Indirect Budget: 0.00	Total Budget: 5,030,748.00										
Principal Investigator/Client	Katherine McGonagle (UM-SRC-PSID) Narayan Sastry (UM-SRC-PSID) Esther Friedman (UM-SRC-PSID)												
Funding Agency													
IRB	HUM#: HUM00062417	Period Of Approval:	3/22/22-3/21/23										
Project Team	Project Lead: Rachel Anne Orłowski Budget Analyst: Ivanna Iavorska-Em Production Manager: Stacy Quisenberry Senior Project Advisor: Stephanie A Chardoul Production Manager: Daric Thorne Production Manager: Shonda R Kruger-Ndiaye												
Proposal #:	no data												
Description:	<p>The Panel Study of Income Dynamics (PSID--also known to Respondents as the Family Economics Study or FES) is a longitudinal survey of several thousand individuals and their families, carried out since 1968 and conducted every two years. The sample is comprised of respondents from the 4,800 original families as well as new (immigrant) sample added in 1997/1999 and 2017/2019. The total 2023 sample size will be approx. 11,200, with approx. 9,650 completed interviews expected. Most of the information collected is about family composition and changes (marriages, divorces, births, deaths, people moving in and out); income sources and amounts; employment and pensions; and wealth. There are also questions about housing; education; vehicles; health; fertility; COVID-19; and money spent on food, healthcare, and school. The main focus is on how these family composition and financial factors interact with each other and how they change over time. The survey will be administered via web and telephone, with the expectation that more surveys will be completed via web than telephone (which will be a first for the study).</p> <p>During the 2023 wave, saliva samples will be collected for the first time on PSID Core. The Core interview must be completed to be eligible for saliva collection. Saliva sample participants that are eligible for collection during Core are adults related to Child Development Supplement (CDS) children but do not live with them. Interviewers will be trained on both the interview and saliva collection protocols. Both data collection efforts will be managed in the same MSMS project. The saliva collection effort has its own proposal number, budget, and MPR entry.</p> <p>The 2023 waves of CDS and the Transition into Adulthood (TAS) will follow PSID Core data collection. CDS and TAS eligibility is dependent upon completion of PSID Core.</p>												
SRO Project Period	03/2022 - 03/2024												
Data Col Period	03/2013 - 12/2023												
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start: 03/01/2022</td> <td style="padding: 5px;">Pretest Start: 10/11/2022</td> </tr> <tr> <td style="padding: 5px;">Pretest End: 10/31/2022</td> <td style="padding: 5px;">Recruitment Start: 09/19/2022</td> </tr> <tr> <td style="padding: 5px;">Staffing Completed:</td> <td style="padding: 5px;">GIT Start:</td> </tr> <tr> <td style="padding: 5px;">SS Train Start:</td> <td style="padding: 5px;">SS Train End:</td> </tr> <tr> <td style="padding: 5px;">DC Start: 03/16/2023</td> <td style="padding: 5px;">DC End: 02/28/2024</td> </tr> </table>			PreProduction Start: 03/01/2022	Pretest Start: 10/11/2022	Pretest End: 10/31/2022	Recruitment Start: 09/19/2022	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start: 03/16/2023	DC End: 02/28/2024
PreProduction Start: 03/01/2022	Pretest Start: 10/11/2022												
Pretest End: 10/31/2022	Recruitment Start: 09/19/2022												
Staffing Completed:	GIT Start:												
SS Train Start:	SS Train End:												
DC Start: 03/16/2023	DC End: 02/28/2024												
Other Project Team Members:													

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

Report Period	Nov, 2022 (PSID23)	Project Phase	Implementing
Risk Level	<i>Some Concerns</i>		
Monthly Update	<p>Major PI decisions:</p> <p>PIs decided on 11/17 that there will be no Early Bird intervention this wave. Received approval from the PIs on 11/22 to delay interviewer production launch until March 20. Finalized web sample release protocol w/ PIs on 11/29. A) Send advance letter. B) Two weeks of batch email/text messages. C) Resend advance letter. D) Two weeks of interviewer email/text messages. E) Two weeks of Web Special Offer w/ batch and interviewer email/text messages. F) Initiate interviewer calling.</p> <p>Technical development:</p> <p>Adjusted development timeline to new launch date. Continued English Blaise CATI and web fixes. Started Spanish Blaise CATI testing and fixes. Updated Case Playback. Created Production INT 1 testing project. Incorporated updated Writer Interceptor merge rules. Specified remaining MSMS scope (including saliva collection) and MSMS improvements from Pretest. Continued work on Team Locating within the 68ID Site. Designed delivery of map files from Mapping Tool to MSMS.</p> <p>QC:</p> <p>Met w/ QC Implementation Team on 11/9. Tried to minimize changes to the 2021 evaluation plan. Confirmed proposed change to verification plan: 1) Verifying both CATI interview and FTF saliva collection and 2) Conducting verification w/in the same MSMS project.</p> <p>Saliva collection:</p> <p>Finalized the scope with PIs and worked w/ DMSS to finish the re-budget. Continued work on the saliva sample management system, report designs, and the operationalization of the protocol. Evaluated possible saliva collection and mailing supplies. Began development of respondent materials. Began literature review of saliva consent requirements and saliva collection materials and procedures. Reached out to SSL leadership to confirm a Survey Tech staffing plan for assembly and logging.</p> <p>Field staffing:</p> <p>Staffed 10 field leaders (instead of 14, including saliva budget staffing). Plan to post again for field leaders. Staffed 61 on-staff interviewers (17 w/ full commitments & 44 sharing w/ other projects)--budgeted 68. The change in staffing plans has a sizable budget impact; working w/ DMSS to calculate an estimate.</p> <p>Training:</p> <p>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. Reached out to hotels and coordinated plans with another project to determine the timing of Training 2.</p>		
Special Issues	<p>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.</p> <p>In need of additional PDMG staff for the saliva collection project.</p>		
Cost			
Dec 15, 2022	Total Cost to Date (Direct + Indirect):	456,884.63	
	Estimated Cost at Completion (E\$AC):	5,264,933.81	
	Total Budget:	5,030,748.00	
	Variance (Budget minus E\$AC):	-234,185.81	

Reason For Variance:

Primarily driven by assigned vs. budgeted resources due to staff departures; adding TL involvement in pre-production; increasing the Survey Tech, lwer II, and lwer III rates; increasing programmer hours; merit increase above 3%; and recruiting/hiring/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
Dec 15, 2022

Dollars Projected For Month:

168,915.60

Actual Dollars Used:

121,712.88

Variance (Projected minus Actual):

47,202.72

Reason For Variance:

Mainly due to DMSS, PDMG, 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 (SCA 2022) Surveys of Consumer Attitudes

Project Mode Primary: Telephone Total of Modes: 1

Project Type Sponsored Projects **Project Status** Current

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

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

Funding Agency

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

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

Proposal #: no data

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

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

SRO Project Period 12/2021 - 12/2022

Data Col Period 01/2022 - 12/2022

Security Plan NA

Milestone Dates

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

Other Project

Team Members:

Other Project

Names:

Sample Mgmt Sys NA

Data Col Tool Blaise 4.8

Hardware Laptop; Desktop; [UM cell] Phone

DE Software NA

QC Recording Tool DRI-CXM

Incentive Not used

Administration N/A

Payment Type N/A

Payment Method N/A

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

Risk Level On Track

Monthly Update SCA NOV22 began as scheduled on WED October 26th, and ended a day earlier than scheduled on SAT November 19th. We completed 602 (322/180/100) IWs for the month (meeting the monthly goals) - at a cumulative HPI of 3.09 (0.09 above the budgeted goal of 3.0).

Special Issues

Cost
Dec 19, 2022

Total Cost to Date (Direct + Indirect): 1,099,480.37
Estimated Cost at Completion (E\$AC): 1,226,011.06
Total Budget: 1,251,758.00
Variance (Budget minus E\$AC): 25,746.94
Reason For Variance: A lower than budgeted HPI for 9 of the 11 months of data collection completed so far this year.

Projections
Dec 19, 2022

Dollars Projected For Month: 97,305.34
Actual Dollars Used: 106,807.21
Variance (Projected minus Actual): -9,501.87
Reason For Variance: A higher than budgeted HPI for the month (only the second month in 2022 with a higher than budgeted HPI) and additional training costs for the October training charged in November.

Measures

	Units Complete	RR	HPI
<i>Current Goal:</i>	600		3.0
<i>Goal at Completion:</i>	600		3.0
<i>Current actual:</i>	602		3.09
<i>Estimate at Complete:</i>	602		3.09
<i>Variance:</i>	+2		+.09

Other Measures

Project Name	(STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study					
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2					
Project Type	Sponsored Projects		Project Status	Current		
Budget	Direct Budget:	8,196,521.00	Indirect Budget:	4,590,892.00 Total Budget: 12,809,390.00		
Principal Investigator/Client	James Wagner (University of Michigan) Robert Ursano (Uniformed Services University of the Health Scienc) Murray Stein / Ron Kessler (University of California San Diego / Harvard)					
Funding Agency	Department of Defense					
IRB	HUM#:	HUM00180765	Period Of Approval:	4/21/22 - 4/20/23		
Project Team	Project Lead:	Meredith A House				
	Budget Analyst:	William Lokers				
	Production Manager:	Ruth B Philippou				
	Senior Project Advisor:	Lisa S Holland				
	Production Manager:	Jeffrey Albrecht Jr				
	Production Manager:	Lisa M Lewandowski-Romps				
Proposal #:	no data					
Description:	<p>This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.</p> <p>For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data.</p> <p>To date, we have completed 2 waves of STARRS-LS interviewing. During Wave 1, we attempted to contact 50,000 individuals and completed approximately 14,500 full interviews. All Wave 1 participants that completed a full Wave 1 interview were asked to participate in Wave 2. Waves 3 and 4, which are covered in this application, will include the full STARRS-LS Wave 2 sample, regardless of whether they completed the interview.</p> <p>In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys).</p>					
SRO Project Period	05/2020 - 04/2025					
Data Col Period	11/2020 - 10/2024					
Security Plan	Yes					
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> PreProduction Start: 04/01/2022 Pretest End: Staffing Completed: 10/01/2022 SS Train Start: 11/14/2022 DC Start: 11/07/2022 </td> <td style="width: 50%; vertical-align: top;"> Pretest Start: Recruitment Start: 07/23/2022 GIT Start: SS Train End: 11/17/2022 DC End: 04/15/2024 </td> </tr> </table>				PreProduction Start: 04/01/2022 Pretest End: Staffing Completed: 10/01/2022 SS Train Start: 11/14/2022 DC Start: 11/07/2022	Pretest Start: Recruitment Start: 07/23/2022 GIT Start: SS Train End: 11/17/2022 DC End: 04/15/2024
PreProduction Start: 04/01/2022 Pretest End: Staffing Completed: 10/01/2022 SS Train Start: 11/14/2022 DC Start: 11/07/2022	Pretest Start: Recruitment Start: 07/23/2022 GIT Start: SS Train End: 11/17/2022 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	Nov, 2022 (STARRS-LS Waves 3 & 4)	Project Phase	Implementing
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Risk Level	<i>On Track</i>
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Monthly Update	<p>Project Management and Planning:</p> <ul style="list-style-type: none"> <input type="checkbox"/> James and Meredith attended the quarterly GSC meeting on November 29. <input type="checkbox"/> We sent weekly production updates to the PIs, and reported on progress on the call with the Army/M&RA. <input type="checkbox"/> Meredith created the agenda/notes and facilitated the weekly meeting with the STARRS project managers. <input type="checkbox"/> We carried out bi-weekly meetings with M&RA to coordinate Safety Plan and respondent locating activities. <input type="checkbox"/> James and Meredith participated in discussions related to the GSC's October 31 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 (although U-M can start on the IRB submission in the new year). We will move forward with adding the WGS flag. Questions related to the degree of aggregation of certain variables and non-job duty MOS will need to be addressed before the work takes place. <input type="checkbox"/> Year 3 subaward: <ul style="list-style-type: none"> <input type="checkbox"/> The remaining hours/cost transfers from the SRO overhead (contingency) account to the Year 3 accounts should post in November. Until then, we have projected those hours/costs to be spent in that month, so cost reports are now close to accurate. <input type="checkbox"/> Plans for STARRS beyond Wave 4: <ul style="list-style-type: none"> <input type="checkbox"/> We made progress on the ballpark budget for the new NSS / STARRS-LS Sample Refresher Study. We are targeting December for having the budget completed. <input type="checkbox"/> A HEARTH Qualitative Interviews budget with revised project dates was sent to Harvard on December 1. <input type="checkbox"/> IRB: <ul style="list-style-type: none"> <input type="checkbox"/> An ORIO for 68 Replicate 1 letters that were mailed to wrong addresses was submitted to the U-M IRB on November 15.
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Enclave and User Support:

- ☐ Annual Security Controls Review: We awaited word from M&RA on when the 2022 review will be scheduled.
 - ☐ Annual Security Training Renewal 2023: The Enclave security coordinator distributed the STARRS Annual DoD Training Renewal instructions to enclave users on November 29. Completed training materials are due by January 31.
 - ☐ 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:
 - ☐ 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.
 - ☐ Enclave IT staff vetted and installed two new R packages in the Linux environment.
 - ☐ We assisted a USUHS researcher with a request for NDI data on the U-M Enclave for SHOS-B cases.
 - ☐ The Enclave team completed some of the documentation streamlining/QC on their housekeeping task list.
- Items in italics have been completed:
- ☐ Review and integration of code and documentation from former data managers to streamline key enclave team tasks:
 - ☐ Creation and QC of NDI sample file, NDI adjudication file and NDI final variable file for Harvard.
 - ☐ Creation and QC of STARRS SSN update file for annual AAG data pull.
 - ☐ Creation and QC of enclave data table modifications required for Respondent withdrawals/revoked consents.

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

Public Use Data:

- ☐ 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 4 Planning and Progress:

- ☐ Production project setup and configuration testing was completed. The team signed off on the functionality of the various pieces that 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
- ☐ Team leaders were certified on administration of the Wave 4 survey in early November.
- ☐ Interviewer training was held November 14-17.
- ☐ We continued work on the sample preload, reporting systems, and a few other items needed for the CATI launch in early December.
- ☐ On November 9 and 18, U-M team members participated in meetings with M&RA and Chaplain leaders from the Army, National Guard and Reserve to discuss how best to disseminate STARRS-LS Safety Plan information to all Chaplains.
- ☐ After working through a number of challenges related to email content and deliverability best practices, work on the email-formatted newsletter was completed. After the PIs provided approval, it was sent to Replicate 1 participants on November 21 and 22. The remaining replicates will receive the newsletter in December.

Wave 4 Production Updates:

- ☐ Wave 4 data collection launched on Monday, November 7, 2022.
- o Replicates released: 1 of 14 released with 713 sample lines.
- o Completed interviews: 247 (all web) and the response rate is 34.6% as of December 1.

Safety Plan Results:

- ☐ The Wave 4 Safety Plan rate is 12.0% as of December 1

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 staff resource shortages, 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 consent review and approval process – these risks were described in a September 30, 2020 memo to M&RA.

o 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.

o 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
Oct 31, 2022

Total Cost to Date (Direct + Indirect): 6,047,111.62

Estimated Cost at Completion (E\$AC): 12,884,704.83

Total Budget: 12,809,390.00

Variance (Budget minus E\$AC): -75,314.83

Reason For Variance:

We spent a total of \$281,446 in October. The remaining hours/cost transfers from the Financial Group overhead account to the Year 3 accounts should post in November. Until then, we have projected those hours/costs to be spent in that month. Our projected deficit for the total five-year project increased slightly to \$75,315 (from \$65,430 in September). We will continue to review project expenses and update our projections based on realized costs and our experiences to date.

Projections
Oct 31, 2022

Dollars Projected For Month: 269,167.21

Actual Dollars Used: 281,445.94

Variance (Projected minus Actual): -12,278.73

Reason For Variance:

The actual dollars amount includes a few more July and August costs that were moved from overhead to the Year 3 accounts.

Measures	Units Complete	RR	HPI
	<i>Current Goal:</i>	75	9
	<i>Goal at Completion:</i>	75	9
	<i>Current actual:</i>		
	<i>Estimate at Complete:</i>		
	<i>Variance:</i>		

Other Measures

Survey Research Operations

Monthly Project Report

Development Initiative and No Data Collection Projects

November 2022



Developmental Initiatives

TSME-SRO SYS MAINTENANCE-GENERAL

TSME23-DCO Tech System Support

TSME23-PIPPA 2.0

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	Nov
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												
Project Mode	MAINTENANCE-GENERAL(483910)												
Project Type	Developmental Initiatives		Project Status Current										
Budget	Direct Budget: 20,000.00	Indirect Budget: 0.00	Total Budget: 20,000.00										
Principal Investigator/Client													
Funding Agency													
IRB	HUM#:	Period Of Approval:											
Project Team	Project Lead:	Jeffrey L Smith											
	Budget Analyst:	Ivanna Iavorska-Em											
	Production Manager:												
	Senior Project Advisor:	Gregg Peterson											
	Production Manager:												
	Production Manager:												
Proposal #:	no data												
Description:	This project will be used to support all maintenance/enhancements needs for applications or systems directly to the SurveyTrak production database which would include Surveytrak, ST Administration, SRS RT, and RCLS to name a few.												
SRO Project Period	07/2022 - 06/2023												
Data Col Period													
Security Plan	NA												
Milestone Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">PreProduction Start:</td> <td style="padding: 5px;">Pretest Start:</td> </tr> <tr> <td style="padding: 5px;">Pretest End:</td> <td style="padding: 5px;">Recruitment Start:</td> </tr> <tr> <td style="padding: 5px;">Staffing Completed:</td> <td style="padding: 5px;">GIT Start:</td> </tr> <tr> <td style="padding: 5px;">SS Train Start:</td> <td style="padding: 5px;">SS Train End:</td> </tr> <tr> <td style="padding: 5px;">DC Start:</td> <td style="padding: 5px;">DC End:</td> </tr> </table>			PreProduction Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
PreProduction Start:	Pretest Start:												
Pretest End:	Recruitment Start:												
Staffing Completed:	GIT Start:												
SS Train Start:	SS Train End:												
DC Start:	DC End:												
Other Project	Ashwin Dey												
Team Members:	Pam Swanson												
	Marsha Skoman												
	Holly Ackerman												
	Darnell Christian												
Other Project	Sys Maint General												
Names:													
Sample Mgmt Sys	NA												
Data Col Tool	NA												
Hardware	NA												
DE Software	NA												
QC Recording Tool	NA												
Incentive	NA												
Administration	NA												
Payment Type	NA												
Payment Method	NA												

Report Period	Nov, 2022 (TSME SRO SYS MAINTEN	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	Continued to correct bugs with Respondent Payment Systems bugs and documenting new features for Mari. Bug fixes for latest build SurveyTrak to PowerBuilder 2022 Updated Reporting systems to use UKG data and removed Deltek		
Special Issues			

Cost
Dec 01, 2022

<i>Total Cost to Date (Direct + Indirect):</i>	17,792.09
<i>Estimated Cost at Completion (E\$AC):</i>	29,386.73
<i>Total Budget:</i>	20,000.00
<i>Variance (Budget minus E\$AC):</i>	-9,386.73
<i>Reason For Variance:</i>	See monthly updates

Projections
Dec 01, 2022

<i>Dollars Projected For Month:</i>	1,700.00
<i>Actual Dollars Used:</i>	6,142.48
<i>Variance (Projected minus Actual):</i>	-4,400.00
<i>Reason For Variance:</i>	See monthly updates

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

Other Measures

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

Project Mode Primary: Not Available

Project Type Developmental Initiatives **Project Status** Current

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

Principal Investigator/Client

Funding Agency

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

Project Team *Project Lead:* Vivienne Y Outlaw

Budget Analyst: Carl S Remmert

Production Manager:

Senior Project Advisor: Gregg Peterson

Production Manager:

Production Manager:

Proposal #: no data

Description: This includes all the support and development work for a suite of tech systems DCO uses, including Fred, Recruitment Website, Iwer Web Site, etc.

SRO Project Period 07/2022 - 06/2023

Data Col Period

Security Plan NA

Milestone Dates

PreProduction Start:

Pretest End:

Staffing Completed:

SS Train Start:

DC Start:

Pretest Start:

Recruitment Start:

GIT Start:

SS Train End:

DC End:

Other Project Max Malhotra

Team Members: Shaowei Sun

Other Project

Names:

Sample Mgmt Sys NA

Data Col Tool NA

Hardware NA

DE Software NA

QC Recording Tool NA

Incentive NA

Administration NA

Payment Type NA

Payment Method NA

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

Risk Level Some Concerns

Monthly Update most of the month was spent supporting the new Interviewer website, which launched on November 28

Special Issues Getting support from CMT can take longer than is optimal - we are working on alternatives. Max spent additional time support the launch of the new website to cover for other staff who had unplanned out of office time. Max did an outstanding job of stepping in and was vital to us meeting our launch goal. We are currently projecting an over run for the year (\$728.24).

Cost
Dec 07, 2022

<i>Total Cost to Date (Direct + Indirect):</i>	35,728.24
<i>Estimated Cost at Completion (E\$AC):</i>	35,728.24
<i>Total Budget:</i>	35,000.00
<i>Variance (Budget minus E\$AC):</i>	-728.24
<i>Reason For Variance:</i>	iwer website programming support

Projections
Dec 07, 2022

<i>Dollars Projected For Month:</i>	0.00
<i>Actual Dollars Used:</i>	3,935.57
<i>Variance (Projected minus Actual):</i>	-3,935.57
<i>Reason For Variance:</i>	iwer website programming support

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

Other Measures 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	<table><tr><td>PreProduction Start:</td><td>Pretest Start:</td></tr><tr><td>Pretest End:</td><td>Recruitment Start:</td></tr><tr><td>Staffing Completed:</td><td>GIT Start:</td></tr><tr><td>SS Train Start:</td><td>SS Train End:</td></tr><tr><td>DC Start:</td><td>DC End:</td></tr></table>					PreProduction Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Completed:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
PreProduction Start:	Pretest Start:														
Pretest End:	Recruitment Start:														
Staffing Completed:	GIT Start:														
SS Train Start:	SS Train End:														
DC Start:	DC End:														
Other Project Team Members:	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	Nov, 2022 (TSME23-PIPPA)	Project Phase	Implementing
Risk Level	On Track		
Monthly Update	Updating editing functions		
Special Issues			
Cost			
Dec 19, 2022	Total Cost to Date (Direct + Indirect):	6,106.43	
	Estimated Cost at Completion (E\$AC):	10,195.14	
	Total Budget:	10,000.00	
	Variance (Budget minus E\$AC):	-195.14	
	Reason For Variance:	Expected	

Projections
Dec 19, 2022

Dollars Projected For Month: 1,242.58
Actual Dollars Used: 777.40
Variance (Projected minus Actual): 465.18
Reason For Variance: Expected

Measures

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

Other Measures

Project Name (TSME23-QC-Systems (483249)) TSME23-QC-Systems (483249)

Project Mode Primary: Not Available

Project Type Developmental Initiatives **Project Status** Current

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

Principal Investigator/Client

Funding Agency

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

Project Team *Project Lead:* Sarah Elisa Broumand
Budget Analyst: Carl S Remmert
Production Manager:
Senior Project Advisor: Shonda R Kruger-Ndiaye
Production Manager:
Production Manager:

Proposal #: no data

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

SRO Project Period 07/2022 - 06/2023

Data Col Period

Security Plan NA

Milestone Dates

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

Other Project

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 Nov, 2022 (TSME23-QC-Systems (483: **Project Phase** Implementing

Risk Level On Track

Monthly Update Overall, OLIVE remains actively used and has remained stable for a few years now.

November hours were used to

1. continue developing the Evaluator assessment feature in Olive.
2. Attend meetings related to QC solutions.
3. Continue to work with Mark N to update the QC Production Report

Special Issues

Cost Nov 30, 2020	<i>Total Cost to Date (Direct + Indirect):</i>	15,868.58
	<i>Estimated Cost at Completion (E\$AC):</i>	29,941.98
	<i>Total Budget:</i>	30,000.00
	<i>Variance (Budget minus E\$AC):</i>	58.02
	<i>Reason For Variance:</i>	Small variance.

Projections Nov 30, 2020	<i>Dollars Projected For Month:</i>	1,536.01
	<i>Actual Dollars Used:</i>	3,379.26
	<i>Variance (Projected minus Actual):</i>	-1,843.25
	<i>Reason For Variance:</i>	

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

Other Measures

Project Name (TSME23-SelfSchedUI (483424)) Self-Scheduling Interface for MSMS

Project Mode Primary: Not Available

Project Type Developmental Initiatives **Project Status** Current

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

Principal Investigator/Client

Funding Agency

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

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

Proposal #: no data

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

SRO Project Period 07/2022 - 12/2022

Data Col Period

Security Plan NA

Milestone Dates

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

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

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

Other Project

Names:

Sample Mgmt Sys NA

Data Col Tool Blaise 5

Hardware NA

DE Software N/A

QC Recording Tool N/A

Incentive Not used

Administration N/A

Payment Type N/A

Payment Method N/A

Report Period Nov, 2022 (TSME23-SelfSchedUI (483424)) **Project Phase** Implementing

Risk Level On Track

Monthly Update Andrew H. had a working meeting with Andrew P. about the design. Andrew P. needs to write the stored procedure that Peter's service will call to get the information to display in Blaise to the subject. Peter can work on the service without Andrew P. having completed the stored procedure. Andrew P. mocked up a test table with how the data will look.

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 Dec 16, 2022

Total Cost to Date (Direct + Indirect):	1,587.38
Estimated Cost at Completion (E\$AC):	9,411.44
Total Budget:	10,000.00
Variance (Budget minus E\$AC):	588.56
Reason For Variance:	Received the cost report 12/16/2022. Sent updates to FSG. I don't have the updated completion cost as of writing this.

Projections Dec 16, 2022

Dollars Projected For Month:	5,551.24
Actual Dollars Used:	523.35
Variance (Projected minus Actual):	5,027.89
Reason For Variance:	The bulk of the projections in November were for Andrew P. and Peter. Andrew P. and Peter had other commitments that took them away from this. There projections are being moved forward.

Measures

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

Other Measures