
Survey Research Operations

Monthly Project Report

Sponsored Data Collection Projects and Development Initiatives

December 2022



Sponsored Data Collection Projects and Development Initiative 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
(D-Amp (formerly H&WB)) Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan)
(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 & Baselines) Health and Retirement Study 2022 Main Interviews
(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
(SRS 2023) Social Relations 2023
(STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study
(TSME23 DCO Tech System Support FY2023) TSME23-DCO Tech System Support (483248) 2023
(TSME23-PIPPA) PIPPA 2.0 (425198) FY23
(TSME23-QC-Systems (483249)) TSME23-QC-Systems (483249)
(TSME23-SelfSchedUI (483424)) Self-Scheduling Interface for MSMS

Sponsored Projects Dashboard

[illegible]

Project Name	(AFHS) American Family Health Study		
Project Mode	Primary: Web	Secondary: Mail	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 1,596,238.00	Indirect Budget: 893,895.00	Total Budget: 2,490,133.00
Principal	Brady West (Survey Research Center)		
Investigator/Clients	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 1:		
	Production Manager 2:		
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.</p> <p>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.</p> <p>There will be a two month gap between replicates. The first replicate will begin in September 2019 and the second in around July 2020.</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>The following revisions have been made to the study design as detailed in the latest budget proposal (SRO scope of work);</p> <ul style="list-style-type: none">o We will use an external vendor to scan returned paper screeners, rather than manual data entry. This vendor will also format the paper forms, print materials and be responsible for most of the respondent mailings.o The original study design did not include web as a mode of data collection for screening. Additional funding from SRC has been obtained by the Principal Investigator to cover the development of a web screener and associated data management and reporting costs.o Telephone reminder calls remains one of the steps in the non-response protocol for the main data collection. However, it is likely that this effort will be targeted to a subset of the selected sample, rather than across the entire sample.o The amount budgeted for the TOA for the screener was \$2 and \$5 – 50% of the sample to receive each amount. The TOA amount will now be \$2 for the full sample. We may provide an additional TOA of \$5 to a subset of the non-responders as part of one of the follow-up reminder mailings (depending on available budget).o The eligibility age range for the study has been changed from 15-49 to 18-49. This eliminates the need to contact to parents/guardians of all eligible respondents who have not reached the age of majority to gain consent to participate in the study. There are three states where the age of majority is above 18 years of age – in these states we will adjust the selection protocol as necessary.o A further change to the study protocol is around completion of the main modules. In some circumstances we will provide Respondents the option to move directly to complete the main modules after completing the screener without being sent an invite in the mail/email to do so. This will only happen if the selected R is also the person who completed the screener.o An experiment around completion of the modules has been introduced to the protocol. Twenty per cent of the selected eligible respondents will be invited to complete the full 60 minute survey as one instrument, rather than completing three separate modules.		
SRO Project Period	01/2019 - 03/2022		
Data Col Period	05/2020 - 04/2022		
Security Plan	NA		

Milestones	<div><div>Pre Production Start: 09/01/2018</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start: 04/21/2020</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End: 04/30/2022</div></div>	
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 Name	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 System	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 \$5 for a subset during NR follow-up)	
Payment Method	Check through STRak RPay System; Check through other system (Info. from MSMS and transfer information via Excel spreadsheet); Imprest Cash Fund from ISR Business Office (Info. from MSMS and transfer information via Excel spreadsheet)	
<div></div>		
Report Period	Dec, 2022 (AFHS)	Closing
Risk Level	On Track	
Monthly Updates	<div>December update</div> <div>Since last month the overspend on the main AFHS project decreased by \$1,500 to \$12,824 due to a refunded for voided cheques.</div> <div>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.</div>	
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 as of Jan 17, 2023	Total Cost to Date (direct + indirect):	2,510,136.92
	Est Cost at Completion (E\$AC):	2,510,136.92
	Total Budget:	2,490,133.00
	Variance (Total Budget minus- E\$AC):	-20,003.92
	Reason for Variance:	<div>*December 2022 update* - Since last month the overspend on the main AFHS project decreased by \$1,500 to \$12,824 due to a refunded for voided cheques.</div> <div>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.</div> <div>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).</div>
Projections as of Jan 17, 2023	Dollars Projected for Month:	0.00

Actual Dollars Used: -2,401.45

Variance (Projected minus Actual): 2,401.45

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 at 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		
Budget	Direct Budget: 50,265.00	Indirect Budget: 0.00	Total Budget: 50,265.00
Principal Investigator/Clients	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 1:		
	Production Manager 2:		
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> <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.</p> <p>Status:</p> <ul style="list-style-type: none">• 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. <p>*****AFHS Non-response Follow-up*****</p> <p>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.</p> <p>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.</p>		

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

SRO Project Period	06/2022 - 09/2023		
Data Col Period	06/2022 - 08/2022		
Security Plan	NA		
Milestones	<div><div><div>Pre Production Start:</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start:</div></div><div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End:</div></div></div>		
Other Project Team Members	Grant Benson Senior Project Advisor Kallan Larsen MSMS task rules and case monitoring Wen Chang DMSS (inc.Dashboard) Raphael Nishimura DMSS (sample selection and Weights) Rebecca Gatward Survey Director James Rodgers Technical lead/MSMS lead Lloyd Hemingway Production Manager Dean Stevens Financial Analyst Andrew Hupp MSMS and Web survey expertise Deborah Wilson Help Desk Colette Keyser Blaise programmer (inc. Portal) Laura Yoder and Rose Zydel Data Managers Kasyera Kowalczyk Project Assistant		
Other Project Name	'A More Efficient Web-Based Approach to Collecting National Family, Fertility and Reproductive Health Data'.		
Sample Mgmt System	MSMS; Project specific system (For non-response follow-up we will just use Excel.)		
Data Col Tool	Blaise 5		
Hardware	Paper and Pencil		
DE Software	External vendor (Data Force)		
QC Recording Tool	N/A		
Incentive	Yes, R; Yes, Other (for non-response follow-up we will use a non-monetary incentive.)		
Administration	SRO Group		
Payment Type	Check, post (\$10); Other (Non-monetary incentive)		
Payment Method	Check through other system (RPay (MSMS))		
<div></div>			
Report Period	Dec, 2022 (AFHS-Additional work)		Implementing
Risk Level	On Track		
Monthly Updates	December 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 or July 2023.		
Special Issues			
Cost as of Jan 17, 2023	Total Cost to Date (direct + indirect):	55,137.59	
	Est Cost at Completion (E\$AC):	55,137.59	
	Total Budget:	50,265.00	
	Variance (Total Budget minus- E\$AC):	-4,872.59	
	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) An updated summary of costs to be funded by sequestering funds is attached.	
Projections as of Jan 17, 2023	Dollars Projected for Month:	0.00	

Actual Dollars Used:

479.89

Variance (Projected minus Actual):

-479.89

Reason for Variance:

Variance is very small.

Measures		Units at 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												
Budget	Direct Budget: 5,056,486.00	Indirect Budget: 1,930,263.73	Total Budget: 6,986,749.73										
Principal Investigator/Clients	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 1: Margaret Lavanger												
	Production Manager 2: 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												
Milestones	<table border="0"> <tr> <td>Pre Production Start: 10/01/2017</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start: 01/01/2018</td> </tr> <tr> <td>Staffing Complete: 02/07/2018</td> <td>GIT Start: 03/19/2018</td> </tr> <tr> <td>SS Train Start: 03/20/2018</td> <td>SS Train End: 03/22/2018</td> </tr> <tr> <td>DC Start: 05/07/2018</td> <td>DC End: 06/30/2022</td> </tr> </table>			Pre Production Start: 10/01/2017	Pretest Start:	Pretest End:	Recruitment Start: 01/01/2018	Staffing Complete: 02/07/2018	GIT Start: 03/19/2018	SS Train Start: 03/20/2018	SS Train End: 03/22/2018	DC Start: 05/07/2018	DC End: 06/30/2022
Pre Production Start: 10/01/2017	Pretest Start:												
Pretest End:	Recruitment Start: 01/01/2018												
Staffing Complete: 02/07/2018	GIT Start: 03/19/2018												
SS Train Start: 03/20/2018	SS Train End: 03/22/2018												
DC Start: 05/07/2018	DC End: 06/30/2022												

Other Project Team Members	Stephanie Chardoul (SPA) Piotr Dworak (Lead) Tony Romanowski (PM) Daric Thorne (PM/SSA) Barb Homburg (PM) Peggy Lavanger (PM) Jim McClure (DCS) Jeff Smith (tech lead) Jim Rodgers (MSMS consultant) Andrew Hupp (MSMS consultant) Pam Swanson (MSMS programmer) Kyle Kwaiser (Data Manager) Dave Dybicki (Blaise) Colette Keyser (Blaise) Tricia Blanchard (MSMS) Kyle Goodman (Help Desk)	
Other Project Name	HHICD Household Income and Childhood Development	
Sample Mgmt System	MSMS	
Data Col Tool	Blaise 5	
Hardware	Laptop; [UM cell] Phone	
DE Software	N/A	
QC Recording Tool	Other (to be specified)	
Incentive	Yes, R	
Administration	SRO Group	
Payment Type	Cash, prepaid (50)	
Payment Method	Check through other system (MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (MSMS)	

Report Period	Dec, 2022 (BFY)	Implementing
Risk Level	On Track	
Monthly Updates	<p>Project updates:</p> <p>Note: BFY Age 3 main data collection has ended on June 30, 2022 with 922 completes exceeding the goal of 907 (and the proposal goal of n=860).</p> <p>Between July 2022 and May/June 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 1/20 we have handed off 648 of 1,000 cases.</p> <p>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 lwers (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.</p> <p>In January, the field team including the PM, TLs and interviewers prepared a training session for the Site Coordinators / RAs on "working with difficult respondents" the session was very well received and interviewers / team were congratulated on preparing and delivering very useful and interactive content.</p> <p>The goal is to confirm contact information with at least 95% of cases. So far...</p> <p>@ 3 month check-in 96% were confirmed @ 6 month 92% were confirmed @ 10 month 96% were confirmed and 648 cases were delivered to the lab</p> <p>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)</p> <p>Technical system: All tech systems are working as needed.</p> <p>Finances: We are now projecting a larger underrun beyond what was communicated to the PIs in September. A notification was sent to the PIs on 1/20 estimating the total expected underrun may reach ~ \$300K. Pls are working on extending the PG end date to allow for spending the total funding and considering how to allocate the money.</p>	
Special Issues		
Cost as of Jan 17, 2023	Total Cost to Date (direct + indirect):	6,356,258.25

Est Cost at Completion (E\$AC):		6,839,970.71		
Total Budget:		6,986,749.73		
Variance (Total Budget minus- E\$AC):		146,779.02		
Reason for Variance:	Underrun continues to increase due to savings across staff levels. A notification was sent to the PIs that the total expected underrun may reach ~ \$300K. PIs are working on extending the PG end date to allow for spending the total funding and considering how to allocate the money.			
Projections as of Jan 17, 2023	Dollars Projected for Month:	77,584.53		
Actual Dollars Used:		47,735.90		
Variance (Projected minus Actual):		29,848.63		
Reason for Variance:		Savings in iwer and management time.		
Measures		Units at 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		
Budget	Direct Budget: 1,131,747.00	Indirect Budget: 294,254.00	Total Budget: 1,426,001.00
Principal Investigator/Clients	Dr. Steven Broglio (U of M Kinesiology) Dr. Micheal McCrea /Dr. Pasquina (Medical College of Wisconsin/Uniformed Services Un) 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 1: Hongyu Johnson Production Manager 2: 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		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Donnalee Grey-Farquharson, Stacy Quisenberry, Hongyu Johnson, Keith Liebetreu, James Koopman, Minako Edgar, David Ackuaku, Carl Remmert		
Other Project Name	CARE-CSI Military		
Sample Mgmt System	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)		
<hr/>			
Report Period	Dec, 2022 (CARE Military)		Implementing
Risk Level	On Track		
Monthly Updates	1. 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.

ISR continued to work with the PI teams to prioritize the sample as various target groups in order to balance and increase the completions.

SRO is waiting for the file which categorizes and prioritizes the sample into target groups - this will be useful if we can receive it in time for endgame planning/activities so we can balance the sample/groups to ensure statistical power.

DonnaLee will be meeting with UM PI to discuss endgame strategies and to plan for the next round of data collection.

2. Care SMS system update:

ISR continues to streamline and resolve respondent payment queries via the new Payment tab in the system.

A tentative timeline has been developed and agreed on which will be good for SRO if QG is able to adhere to it. QuesGen has assured us that they have started the programming and will be able to meet the timeline for our first round of testing.

3. Questionnaire Development:

ISR is currently creating the Interviewer administered versions for the new sections of the questionnaire as well as the sections that are being modified. SRO noticed a fair number of breakoffs at the section of the questionnaire requesting contact person which was at the beginning of the survey. For the next round of data collection The CARE PIs are taking SROs advice and will move this section to the end of the survey.

4. Production:

ISR received Release 5 with 1843 cases. They were 839 High Exposure and 1004 Low Exposure cases.

We will be receiving 2014 new sample lines in January 2023.

SRO received the long awaited updated contact information, email and phone number. The military is transitioning their email from mail.mil to indicate the specific branches e.g. army.mil. The transition is happening over time so some of the emails we received are up to date and some have changed since we received the file. Clearly we are having some problems using it but having figured out the pattern of the address for each branch has made it easier. Respondents have been helpful in this as well. So, the next time we get a contact info file it should be more accurate.

Production is going okay but we continue to strategize to make it better. 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.

We hosted a contact attempt challenge Dec 11-17 in an effort to maintain strong production throughout the holiday month. 20 out of 32 interviewers met the criteria and were awarded a \$15 e-gift card, paid by the U of M PI.

The Interviewers have been using the QG system to send emails to Rs. We began testing sending emails to respondents by using UM Gmail with 9 interviewers. We will plan to extend to all interviewers after the trial period.

Production managers and TLs continue to conduct biweekly field calls for additional training as needed.

Production Stats as of 12/31/2022:

10548 Released: Total Comp lws-2148 -20.4% (Web-12120 -20.2%, CATI-28 -0.3%)

5. Hiring and Training:

2 interviewers off the project due to personal reasons. 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.

6. DMSS:

Lines were pulled from our sample for another arm of CARE data collection (in person assessments - Tier 2) by QG. SRO is "keeping" them in the sample for all reports.

7. Locating:

The Locating team continues to send direct messages on Social Media using the CARE Instagram account in addition to using the updated and workable Military email addresses. Military Find Rate = 46.4%.

Special Issues

Cost as of Dec 31, 2022	Total Cost to Date (direct + indirect):	853,731.71
	Est Cost at Completion (E\$AC):	1,425,777.36
	Total Budget:	1,426,001.00
	Variance (Total Budget minus- E\$AC):	223.64
	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 as of Dec 31, 2022		Dollars Projected for Month:			76,734.78
		Actual Dollars Used:			78,699.91
		Variance (Projected minus Actual):			-1,965.13
		Reason for Variance:			
Measures		Units at Complete	RR	HPI	
	Current Goal:				
	Goal at Completion:				
	Current Actual:				
	Estimate at Complete:				
	Variance:				
Other Measures					

Project Name	(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022												
Project Mode	Primary: Telephone	Secondary: Web	Total of Modes: 2										
Project Type	Sponsored Projects												
Budget	Direct Budget: 3,718,978.00	Indirect Budget: 966,936.00	Total Budget: 4,685,914.00										
Principal Investigator/Clients	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 1: Hongyu Johnson												
	Production Manager 2: 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												
Milestones	<table> <tr> <td>Pre Production Start:</td><td>Pretest Start:</td></tr> <tr> <td>Pretest End:</td><td>Recruitment Start:</td></tr> <tr> <td>Staffing Complete:</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>			Pre Production Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Complete:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
Pre Production Start:	Pretest Start:												
Pretest End:	Recruitment Start:												
Staffing Complete:	GIT Start:												
SS Train Start:	SS Train End:												
DC Start:	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 Name	CARE CSI, CARE SALTOS												
Sample Mgmt System	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	Dec, 2022 (CARE SALTOS MTEC)	Implementing
Risk Level	On Track	
Monthly Updates	<p>1. Project Management: SRO is waiting for the file which categorizes and prioritizes the sample into target groups - this will be useful if we can receive it in time for endgame planning/activities so we can balance the sample/groups to ensure statistical power.</p> <p>Donnalee will be meeting with UM PI to discuss endgame strategies and to plan for the next round of data collection.</p> <p>2. Care SMS system update: ISR continues to streamline and resolve respondent payment queries via the new Payment tab in the system.</p> <p>A tentative timeline has been developed and agreed on which will be good for SRO if QG is able to adhere to it. QuesGen has assured us that they have started the programming and will be able to meet the timeline for our first round of testing.</p> <p>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.</p> <p>3. Questionnaire Development: ISR is currently creating the Interviewer administered versions for the new sections of the questionnaire as well as the sections that are being modified. SRO noticed a fair number of breakoffs at the section of the questionnaire requesting contact person which was at the beginning of the survey. For the next round of data collection The CARE PIs are taking SROs advice and will move this section to the end of the survey.</p> <p>4. Production: SRO will be receiving 2366 new sample lines in January 2023.</p> <p>Production is going okay but we continue to strategize to make it better. 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.</p> <p>We hosted a contact attempt challenge Dec 11-17 in an effort to maintain strong production throughout the holiday month. 20 out of 32 interviewers met the criteria and were awarded a \$15 e-gift card, paid by the U of M PI.</p> <p>The Interviewers have been using the QG system to send emails to Rs. We began testing sending emails to respondents by using UM Gmail with 9 interviewers. We will plan to extend to all interviewers after the trial period.</p> <p>Production managers and TLs continue to conduct biweekly field calls for additional training as needed.</p> <p>Production Stats as of 12/31/2022: 10597 Released: Total Comp lws-2421 - 22.9% (Web-2388 -22.6%, CATI-33-0.3%)</p> <p>5. Hiring and Training: 2 interviewers off the project due to personal reasons. We continue to negotiate with other projects regarding sharing and/or releasing interviewers. These changes will become effective in spring 2023.</p> <p>6. DMSS: Lines were pulled from the SRO sample for another arm of CARE data collection (in person assessments - Tier 2) by QG. SRO is "keeping" them in the sample for all reports.</p> <p>7. Locating: The Locating team continues to send direct messages on Social Media using the CARE Instagram account. Civilian Find Rate = 31%.</p>	
Special Issues		
Cost as of Dec 31, 2022	Total Cost to Date (direct + indirect):	807,261.30
	Est Cost at Completion (E\$AC):	4,641,637.79
	Total Budget:	4,685,914.00
	Variance (Total Budget minus- E\$AC):	44,276.21
	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

Projections as of Dec 31, 2022	<i>Dollars Projected for Month:</i>	54,946.89
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	<i>Actual Dollars Used:</i>	52,334.92
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	<i>Variance (Projected minus Actual):</i>	2,611.97
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	<i>Reason for Variance:</i>
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Measures		Units at Complete	RR	HPI
	<i>Current Goal:</i>			
	<i>Goal at Completion:</i>			
	<i>Current Actual:</i>			
	<i>Estimate at Complete:</i>			
	<i>Variance:</i>			

Other Measures

Project Name	(CRUSE - AHDFS) Survey on Crypto-Asset Adoption and Use / American Household Digital Finance Survey		
Project Mode	Primary: Web	Secondary: Focus Group	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 492,515.00	Indirect Budget: 142,829.00	Total Budget: 635,344.00
Principal Investigator/Clients	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 1:		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	<p>Revised project costs are \$635,344 (\$625,726 + \$9,618). Original description below. Focus groups completed as designed. Project has been revised in that the PI has requested only an initial replicate be used for the survey pending full funding availability. Also, full indirect rate is not applied as we originally indicated. ORSP and Financial Services determined this was not research but was in fact other sponsored activity. IDC revised to 29%. ORIGINAL DESCRIPTION:</p> <p>SRO will conduct two exploratory focus groups and web-based data collection to study awareness, use and adoption of crypto-assets in the general population and more specifically among those more informed about crypto-assets. SRO will screen an address-based representative sample of approximately 40,980 U.S. households for adults who hold or have held crypto-assets. All who report crypto-asset holdings will be invited to participate in the web survey, along with a random sub-sample of those who have not held crypto-assets. SRO interviewers will conduct reminder calling to non-respondents to encourage them to participate in the survey.</p> <p>This budget assumes an overall SRO involvement period of 12 months commencing in May 2022 with focus groups taking place in May or early June 2022 and the web data collection taking place during a 5-month period beginning September 2022. The total cost for this work is estimated at \$1,724,766 (\$1,105,619 direct, \$619,147 indirect), budgeted at the University-approved indirect recovery rate of 56 percent. \$635,344 (\$625,726 + \$9,618).</p>		
SRO Project Period	05/2022 - 04/2023		
Data Col Period	10/2022 - 02/2023		
Security Plan	NA		
Milestones	<div><div><div>Pre Production Start: 08/01/2022</div><div>Pretest End:</div><div>Staffing Complete: 10/14/2022</div><div>SS Train Start: 11/29/2022</div><div>DC Start: 11/02/2022</div></div><div><div>Pretest Start:</div><div>Recruitment Start: 09/14/2022</div><div>GIT Start: 11/29/2022</div><div>SS Train End: 11/29/2022</div><div>DC End: 03/01/2023</div></div></div>		
Other Project Team Members	Karin Schneider conducted focus group. Survey phase led by Piotr Dworak. Team include Ian Ogden and Xiomara Guerra.		
Other Project Name	American Household Digital Finance Survey		
Sample Mgmt System	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	Dec, 2022 (CRUSE - AHDFS)		Implementing
Risk Level	On Track		
Monthly Updates	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.		

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

As of 1/20 we have 1055 completes of the 1529 goaled completes representing 10.5% response rate (goal 14.9%).

We continue having concerns with achieving the target response rate despite optimizing the SSL non-response follow up protocol and adding texting capabilities. We are actively communicating with the PI who, in turn, is reporting to Coinbase. So far no concerns were expressed and the plan for getting close to the goals has been approved.

We will continue the SSL effort. The effort side is excellent with high dials per hour. We called all cases with appended number at least once and now are doubling-back with the added option to send reminder texts. However, the productivity of calls (surveys completed after the calls) is still fairly low and disappointing. Interviewers used 943 hours and attempted 9767 lines but approximately 77 respondents completed as a result of the non-response follow up. At this rate, we would fall short of the goal achieving around 1200 - 1300 completes with NRFU alone.

After consultation with Admin, PIs were presented with and approved a last-chance end-game mailing with an incentive increase of \$30 +\$15 or +\$20.

Separately we are doubling-back over the sample with optimized calling and texting strategies.

Interviewers can now send a general reminder text using a QR code / mobile phone. They are using differential strategies for priority 1 and 2 and 0 cases. Priority 1 are cases who agreed to do the survey but have not done so yet. Priority 2 are cases with whom we had contact before and confirmed they are at the right address. For Priority 1 and 2 cases interviewers are calling and following up with a text message. For priority 0 cases, interviewers are only sending a text message.

Sample balancing:

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-done-worse-than-expected/>

Finance:

After last budget adjustments we were able to generate underrun while preserving interviewer hours mostly due to reductions within the management and tech team for a steady-state project.

Special Issues				
Cost as of Jan 17, 2023	Total Cost to Date (direct + indirect):			322,807.86
	Est Cost at Completion (E\$AC):			609,966.64
	Total Budget:			635,344.00
	Variance (Total Budget minus- E\$AC):			25,377.36
	Reason for Variance:		Projecting underrun at project close after determining the final management staffing levels.	
Projections as of Jan 17, 2023	Dollars Projected for Month:			86,838.13
	Actual Dollars Used:			93,673.02
	Variance (Projected minus Actual):			-6,834.89
	Reason for Variance:		Some of the iwer time needed to be adjusted along with costs from the vendor for mailing Invitation, Reminder 1, and Reminder 2.	
Measures		Units at Complete	RR	HPI
	Current Goal:	1529	14.9%	
	Goal at Completion:	1529	14.9%	
	Current Actual:	970	9.5%	
	Estimate at Complete:	1529	14.9%	
	Variance:			
Other Measures				

Project Name	(D-Amp (formerly H&WB)) Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan)		
Project Mode	Primary: Face to Face Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 1,466,538.00	Indirect Budget: 821,264.00	Total Budget: 2,287,802.00
Principal Investigator/Clients	Kristine Ajrouch (Life Course Development Program, SRC) Toni Antonucchi (Life Course Development Program, SRC) Laura Zahodne (Life Course Development Program, SRC)		
Funding Agency			
IRB	HUM#: HUM00146040	Period of Approval: 4/9/2020	
Project Team	Project Lead: Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Taghreid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 600 interviews with recently identified Arab Americans aged 65 or older residing in Southeast Michigan and 330 interviews with Social Relations sample members aged 65 or older. The Arab American sample will be selected based on an in-person household screening. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements. Social Relations respondents will only complete the cognitive interview. An informant interview will also be conducted for all sample members. Interviews will be conducted in English or Arabic. A pretest will be conducted in August 2019 with main data collection occurring from November 2019 through July 2020.		
SRO Project Period	05/2019 - 03/2023		
Data Col Period	05/2023 - 03/2024		
Security Plan	No		
Milestones	<div><div>Pre Production Start: 12/01/2022</div><div>Pretest End:</div><div>Staffing Complete: 04/01/2023</div><div>SS Train Start: 05/18/2023</div><div>DC Start: 05/30/2023</div></div> <div><div>Pretest Start:</div><div>Recruitment Start: 02/01/2023</div><div>GIT Start: 05/16/2023</div><div>SS Train End: 05/24/2023</div><div>DC End:</div></div>		
Other Project Team Members	Taghreid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall		
Other Project Name	Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan)		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	DRI-CARI; Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	SRO Group		
Payment Type	Cash, prepaid (\$75 respondent, \$25 informant)		
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)		

Report Period	Dec, 2022 (D-Amp (formerly H&WB))		Planning
Risk Level	On Track		
Monthly Updates	Initial planning meeting held with the research team to review work scope and discuss timeline. Drafted initial project schedule. Drafted a specification for recruitment and training, which was used to request RFQs for training sites. Conducted initial meetings to confirm staffing for the project, review scope Began drafting RFQ for procurement.		
Special Issues	The pre-production timeline is very short. The PI indicated that there would be a number of questionnaire changes, which were not anticipated in the budget.		
Cost as of Jan 11, 2023	Total Cost to Date (direct + indirect):		1,012,402.36
	Est Cost at Completion (E\$AC):		1,012,402.36

Total Budget:		2,287,802.00		
Variance (Total Budget minus- E\$AC):		1,275,399.64		
Reason for Variance:		The project started at the request of the PIs, before funding from the sponsor was confirmed in writing. The newly awarded budget is not yet in the system, nor are projections. No cost report is available in the system -- budgets are in the process of being entered.		
Projections as of Jan 11, 2023	Dollars Projected for Month:	0.00		
Actual Dollars Used:		823.87		
Variance (Projected minus Actual):		-823.87		
Reason for Variance:		The project started at the request of the PIs, before funding from the sponsor was confirmed in writing. No cost report is available in the system -- We are in the process of updating both budget and projections.		
Measures		Units at Complete	RR	HPI
	Current Goal:	930		
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(ECHO (Year 7)) Environmental Influences on Child Health Outcomes		
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 384,033.00	Indirect Budget: 215,058.00	Total Budget: 599,091.00
Principal Investigator/Clients	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 1: Ian Ogden		
	Production Manager 2: 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		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		

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
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Other Project Name

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

Report Period	Dec, 2022 (ECHO (Year 7))	Implementing
Risk Level	On Track	

Monthly Updates	<p>[Phase 1: Recruitment and Prenatal Surveys]</p> <p>The MARCH recruitment target was 1,110 mothers / live births. Recruitment is done and the final count is 1,113.</p> <p>-----</p> <p>[Phase 2: 3-Month Data Collection Summary as of 1/18/23]</p> <p>3-month sample released: 966 3-month interviews completed: 691 Average attempts / lw: 7.7 lw length: 35 min. Response Rate: 72% 3-month biospecimen collected: 396</p> <p>-----</p> <p>[Phase 3: Age 4 REDCap Survey as of 1/18/23]</p> <p>Age-4 sample released: 241 REDCap surveys completed: 155 Response Rate: 65%</p> <p>-----</p> <p>[Phase 3: Age 4 In-Person Visit Protocols as of 1/18/23]</p> <p>Age-4 IPV sample released: 126 In-person visits completed: 42</p> <p>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.</p> <p>Data collection for the in-person visits includes physical measures, biospecimen and cognitive assessment components outlined in previous monthly reports. The SRO team is beginning work with MSU to develop a phased close to all SRO data collection and systems prior to the August 2023 conclusion of funding.</p>
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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.
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Cost as of Jan 18, 2023	Total Cost to Date (direct + indirect):	195,191.18
	Est Cost at Completion (E\$AC):	598,636.11
	Total Budget:	599,091.00

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 interviewer hours in anticipation of there being more interviews to conduct than originally budgeted (particularly Y4 in-person visits).

Projections as of Jan 18, 2023 **Dollars Projected for Month:**

57,997.10

Actual Dollars Used:

60,269.48

Variance (Projected minus Actual):

-2,272.38

Reason for Variance:

Monthly actuals actually came in ~\$10K under projections but for a \$10K mischarge from another U-M department. It will be corrected and is being projected in the negative as a non-sal charge in a future month.

Measures		Units at 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		
Budget	Direct Budget: 1,513,016.00	Indirect Budget: 611,135.00	Total Budget: 2,124,151.00
Principal	Elizabeth Rhodes (OpenResearch Lab)		
Investigator/Clients	Stephanie Chardoul (Survey Research Operations)		
	Sarah Miller (Universityof Michigan)		
Funding Agency			
IRB	HUM#: HUM00145626/CR000904		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 1: Donnalee Ann Grey-Farquharson		
	Production Manager 2: Melissa Luker		
Proposal #	no data		
Description	<p>The overall project is funded by a consortium (currently consisting of both OpenResearch Lab (Open) and NIH.</p> <p>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).</p> <p>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.</p> <p>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.</p> <p>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).</p> <p>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.</p> <p>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:</p> <ul style="list-style-type: none">- 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) <p>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).</p> <p>Post Collection Processing:</p> <ul style="list-style-type: none">• 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. <p>Deliverables:</p> <ul style="list-style-type: none">• 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:<ul style="list-style-type: none">o Contact attempts ??number by type (SMS, phone, email, in-person)??date/time of last attempto 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 lineo SRO will work with Open during pre-production to finalize variables and format.		

- We will work with Open between completion of active data collection and end of the funding period for Midline to reconcile any outstanding discrepancies in the data.
- SRO will also deliver:
 - o Daily data collection progress reports
 - o A final summary of field methods at the end of data collection
 - o A full survey dataset with all participant contact information at the close of data collection.

SRO Project Period	09/2021 - 10/2022		
Data Col Period	03/2022 - 07/2022		
Security Plan	NA		
Milestones	<div><div><div>Pre Production Start:</div><div>Pretest End:</div><div>Staffing Complete: 03/04/2022</div><div>SS Train Start: 02/28/2022</div><div>DC Start: 04/04/2022</div></div><div><div>Pretest Start:</div><div>Recruitment Start: 01/01/2022</div><div>GIT Start: 02/26/2022</div><div>SS Train End: 03/31/2022</div><div>DC End: 08/14/2022</div></div></div>		
Other Project Team Members	Kirsten Alscer (SPA), Barbara Ward (Project Lead) , Donnalee Grey-Farquharson (Project Manager) Marsha Skoman (Tech Lead), Jeff Smith (Tech Lead backup), Peter Sparks (Blaise Programmer), Ashwin Dey (Webtrak Programmer), Stephanie Windisch (Data Manager), Barb Homburg (Production manager, Field), William Keating (Production manager, SSL), Megan Gomez-Mesquita (Financial Analyst)		
Other Project Name	EDC		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone		
DE Software	N/A		
QC Recording Tool	Camtasia		
Incentive	Yes, R		
Administration	SRO Group; Other (PI Payment)		
Payment Type	Cash, prepaid (\$50 Goodwill Token); Cash, post (\$50); Other (\$50 - Kept Appt)		
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox); Other (Electronic payment by PIs)		
<hr/>			
Report Period	Dec, 2022 (EDC Midline)		Closing
Risk Level	On Track		
Monthly Updates	During December 2022, SRC activities on the EDC Midline project included the following: Task 1 Midline: Management, Budget and Work Plan <ul style="list-style-type: none">• Reviewed cost reports, expenses, investigated late charges.• Worked with staff members to correct timesheets.• Prepared financial statements.		

Special Issues

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.

Cost as of Jan 17, 2023	Total Cost to Date (direct + indirect):			1,634,609.35
	Est Cost at Completion (E\$AC):			1,634,609.35
	Total Budget:			2,124,151.00
	Variance (Total Budget minus- E\$AC):			489,541.65
	Reason for Variance:			Hours per interview were very low due to heavy use of the self-scheduler by respondents. HPI was 3 versus roughly 6 HPI budgeted.
Projections as of Jan 17, 2023	Dollars Projected for Month:			1,698.67
	Actual Dollars Used:			-2,965.33
	Variance (Projected minus Actual):			4,664.00
	Reason for Variance:			The variance is due to timesheet and indirect cost corrections.
Measures		Units at 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		
Budget	Direct Budget: 2,382,700.00	Indirect Budget: 714,811.00	Total Budget: 3,097,511.00
Principal	Stephanie Chardoul (SRO)		
Investigator/Clients	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 1: Karin Schneider		
	Production Manager 2: Donnalee Ann Grey-Farquharson		
Proposal #	no data		
Description	<p>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).</p> <p>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.</p> <ul style="list-style-type: none">• 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. <p>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.</p> <p>We have not budgeted for coding any open-ended responses.</p> <p>Deliverables:</p> <ul style="list-style-type: none">• 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:<ul style="list-style-type: none">o Contact attempts? number by type (SMS, phone, email, in-person)? date/time of last attempto 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 lineo 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:<ul style="list-style-type: none">o Daily data collection progress reportso A final summary of field methods at the end of data collectiono A full survey dataset with all participant contact information at the close of data collection.		

SRO Project Period	01/1996 - 01/1996	
Data Col Period		
Security Plan	NA	
Milestones	<div><div><div>Pre Production Start:</div><div>09/01/2022</div></div><div><div>Pretest End:</div><div></div></div><div><div>Staffing Complete:</div><div>02/27/2023</div></div><div><div>SS Train Start:</div><div>03/19/2023</div></div><div><div>DC Start:</div><div>03/28/2023</div></div></div> <div><div>Pretest Start:</div><div></div></div> <div><div>Recruitment Start:</div><div>02/01/2023</div></div> <div><div>GIT Start:</div><div></div></div> <div><div>SS Train End:</div><div>03/23/2023</div></div> <div><div>DC End:</div><div>09/30/2023</div></div>	
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 Name		
Sample Mgmt System	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	Dec, 2022 (EDC-Endline)	Implementing
Risk Level	On Track	
Monthly Updates	<div>During December 2022, SRC activities on the EDC Midline and EDC Endline project included the following: Task 1 Endline: Management, Budget and Work Plan<ul style="list-style-type: none">• Participated in project meetings with ORL to discuss scope, cost projections and schedule for EDC Endline• On-boarded new project management staff• Financial<ul style="list-style-type: none">o Reviewed monthly project expenses for Midline and Endline. Updated projections and produced reports.o Updated estimate of estimated costs of development of in-person survey preparation, including programming, hosting, and supplies acquisition.o Updated estimates for moving the in-person training to May, estimated number of interviewers required for the in-person survey• Programming/Specification<ul style="list-style-type: none">o Reviewed/specified further Endline questionnaire edits for telephone & In-person, provided to programmero Began set-up for testing on the telephone self-scheduler.o Conducted repeated rounds of questionnaire testing• Production Preparation<ul style="list-style-type: none">o Updated pre-production scheduleo Drafted procurement documents for kitting for the in-person survey, responded to procurement questions regarding the RFQ• Training preparation<ul style="list-style-type: none">o Began review of training agenda for a virtual telephone training Task 1 Midline: Management, Budget and Work Plan<ul style="list-style-type: none">• Reviewed cost reports, expenses, investigated late charges.• Worked with staff members to correct timesheets.• Prepared financial statements. Task 2: Sampling<ul style="list-style-type: none">• No activity this month Task 3: Questionnaire Development<ul style="list-style-type: none">• 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<ul style="list-style-type: none">• Continued programming Endline telephone questionnaire changes resulting from testing, further specification development.• Continued programming Endline in-person questionnaire changes• Updated post-interview observations and contact observations specification Task 5: Systems Programming<ul style="list-style-type: none">• Sample Management Systems<ul style="list-style-type: none">o Continued editing of SurveyTrak specifications for Endlineo Conducting initial interative rounds of testing in SurveyTrak, resolved bugs and re-testedo Prepared testing preload for SurveyTrak, Self-Scheduler and Blaise applications</div>	

- o Prepared additional testing lines for SurveyTrak and Blaise
- Self-Scheduler
- o Prepared preload and sample lines for testing
- Reporting systems
- o Updated data dictionaries for preload & deliverables

Tasks 6, 7: Interviewer Recruitment & Hiring, Training

- Conducted outreach to selected conference center for changed dates for in-person training
- Negotiated contract with selected conference center to move in-person training to May 5 through 12; signed contract

Task 8: Main Data Collection

- Researched costs/availability of equipment for the in-person survey

Task 9: Post Collection Processing

- No activity this month

Task 10: Weighting

- No activity this month

Task 11: Final Data Deliverables

- No activity this month

Areas Requiring Attention:

Current Updates:

- We continue to project a substantial underrun for the Midline project
- ? The project hired and trained a lower number of interviewers than anticipated, and the trainings were shorter than had been budgeted. This will result in lower than anticipated hosting and training travel costs.
- ? Hours per interview are exceptionally low due to heavy use of the self-scheduler. Final overall HPI: 3.01.

Special Issues

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 scheduled an in-person training in May for new-hires and on-staff interviewers who will work on the in-person survey.
- o SRO signed a hotel/hosting contract for the May (May 5-12, 2023) in-person training. ORL understands that it will be committed to paying a penalty for cancellation or change of the contract. There is a 25% penalty for changes through March 5, at which point the penalty will increase.
- 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 as of Jan 17, 2023	Total Cost to Date (direct + indirect):	116,875.82
	Est Cost at Completion (E\$AC):	4,056,749.65
	Total Budget:	3,097,511.00
	Variance (Total Budget minus- E\$AC):	-959,238.65
	Reason for Variance:	The indirect cost amount is incorrect, due to the delay in receipt of NIH funding. The budget reflects the currently awarded amount, however the work scope is more reflective of the *expected* work scope (including supplemental funds from NIH).

Projections as of Jan 17, 2023	Dollars Projected for Month:	84,265.45
	Actual Dollars Used:	58,144.60
	Variance (Projected minus Actual):	26,120.85
	Reason for Variance:	We have delayed ordering supplies due to the delay in receipt of NIH funds. In addition, staff (especially TSG staff) are charging fewer hours than budgeted. Work on the in-person self-scheduler was halted in December due to staff absences.

Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	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		
Budget	Direct Budget: 314,566.00	Indirect Budget: 94,369.00	Total Budget: 408,935.00
Principal	Jessica Wiederspan (OpenResearchLab)		
Investigator/Clients	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 1:		
	Production Manager 2:		
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		
Milestones	<div><div>Pre Production Start:</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start:</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End:</div></div>		
Other Project Team Members	Ashwin Dey, Becky Loomis, Andrea Pearce, Marsha Skoman, Peter Sparks, Stephanie Windisch		
Other Project Name	"Phase 3/4" is often referred to as "Round 3/4"		
Sample Mgmt System	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	Dec, 2022 (EDC-SS Phases 3-4)		Implementing
Risk Level	On Track		
Monthly Updates	We have 111/121 iws, so are down to just a few open lines.		
Special Issues	Disappointed PIs will continue interviewing on their own for Phases 5 and 6, but they are very satisfied with project thus far.		
Cost as of Jan 17, 2023	Total Cost to Date (direct + indirect):		285,919.25
	Est Cost at Completion (E\$AC):		320,659.44
	Total Budget:		408,935.00
	Variance (Total Budget minus- E\$AC):		88,275.56
	Reason for Variance:		Just using fewer hours to get these last cases interviewed. So Barb H and Karin also have fewer hours.
Projections as of Jan 17, 2023	Dollars Projected for Month:		39,602.38
	Actual Dollars Used:		27,271.06

Reason for Variance: Interviewers using fewer hours to get these last cases interviewed. So Barb H and Karin also have fewer hours.

Measures		Units at Complete	RR	HPI
	Current Goal:	115	95	6
	Goal at Completion:	115	95%	6
	Current Actual:	111	92	6.6
	Estimate at Complete:	115	95	6.5
	Variance:			

Other Measures

Project Name	(HCAP 2022) Healthy Cognitive Aging Project, 2022		
Project Mode	Primary: Face to Face	Secondary: Telephone	
Project Type	Sponsored Projects		
Budget	Direct Budget: 3,300,000.00	Indirect Budget: 1,188,000.00	Total Budget: 4,488,000.00
Principal	Kenneth Langa (SRC)		
Investigator/Clients	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 1:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>This project will involve the completion of a face-to-face CAPI interview, designed to provide a dementia assessment of HRS respondents. A sample of 5000 respondents (one per household) who are 65 years of age or older will be selected for this effort. The questionnaire is a series of 15 cognitive tests and will be administered to respondents after the HRS 2022 interview has been completed. The sample will not be clustered geographically; it will be selected randomly. It is expected that the field team will carry out well-planned regional trips in order to complete the 3,530 in-person interviews. An informant interview will also be completed for each of the respondents interviewed.</p> <p>The respondent questionnaire length is expected to be 60 minutes. The informant questionnaire is expected to be 20 minutes and can be administered in-person after the R interview, or by telephone/mail if FTF is not available.</p>		
SRO Project Period	01/2022 - 12/2023		
Data Col Period	07/2022 - 09/2023		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 04/01/2022</div><div>Pretest End: 05/21/2020</div><div>Staffing Complete:</div><div>SS Train Start: 07/13/2022</div><div>DC Start: 07/18/2022</div></div> <div><div>Pretest Start: 05/01/2020</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End: 07/15/2022</div><div>DC End: 08/31/2023</div></div>		
Other Project Team Members	PDMG: Tony Romanowski, Lisa VanHavermaet, Megan Hromco, Kristen Cross. TSG: Jeff Smith, Brad Goodwin, Valyn Dall, Peter Sparks, Ashwin Dey, Deb Wilson		
Other Project Name	Harmonized Cognitive Assessment Protocol		
Sample Mgmt System	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); Cash, post (25)		
Payment Method	Check through STrak RPay System		
Report Period	Dec, 2022 (HCAP 2022)		Implementing
Risk Level	Some Concerns		
Monthly Updates	<p>HCAP production has been underway for 27 weeks and is going well. As of this morning, 1,960 interviews have been completed, including 1,081 R and 879 Inf. There are currently 259 appts (158R, 101Inf). The overall HPI is 4.63. It increased when new lwers started working after the October training but has continued to decrease each week. 77 Spanish interviews have been completed (42 R, 35 Inf). There are currently 28 interviewers on staff. The budget was created prior to 2020 data collection, but the project was paused due to the Covid-19 pandemic and started in 2022. We are still using the same HCAP 2020 budget. We are projecting an overrun, and have made updates to the budget to account for several items that have led to this, as outlined in previous month's MPRs. The factors contributing to the overrun are:</p> <p>a. When the current budget was approved for HCAP2020, the budget was capped. lwer hours were cut from ~28,000 to ~21,000 but interview goals remained the same. We are increasing projections to 31,000 lwer hrs needed to meet goals, and to cover the 2022 increased sample size.</p> <p>b. The sample size increased for 2022 (N=6,033) while the 2020 budget was developed to accommodate the smaller sample size (N=5,655). This has caused an increase in the following costs:</p>		

1. Respondent payments (although amount budgeted in 2020 is sufficient for 2022 sample size)
2. Travel costs
3. Materials
c. Since 2020, travel costs and materials/duplicating costs have increased significantly due to inflation and caused increases in spending on these items aside from the increased sample size.
d. There was a low level of management activity to maintain the project between 2020 and 2022 when FTF data collection was not possible, that was not projected for.
e. Lwer rates have increased since pre-2020.
f. The 2020 budget assumed 1 training but we needed 2.
Project staff and PIs are aware of and expected this overrun, and costs are being itemized to share with them. The cost increases assume the project ends in August 2023 as projected. If HRS production is extended, then HCAP will also extend and would need additional funds. We are currently working through a cost scenario in the sandbox in which data collection ends in December, as HRS is discussing extending. The current cost increase assumes no more interviewer trainings. If another training is needed, that would need to be supplemented as well. At this point we are not expecting the need for an additional training, but it is dependent on lwer retention for the next 8 months.
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. Ann Arbor project management staff are conducting additional Brave Man and Logical Memory and Constructional Praxis QC since it is administered via paper and pencil and not in Blaise.

Special Issues	Production training and production launch were postponed to Summer, 2022 due global pandemic. We are projecting an overrun due to the factors outlined in the 'Monthly Updates' section.			
Cost as of Jan 17, 2023	Total Cost to Date (direct + indirect):		2,063,122.23	
	Est Cost at Completion (E\$AC):		4,959,713.93	
	Total Budget:		4,488,000.00	
	Variance (Total Budget minus- E\$AC):		-471,713.93	
	Reason for Variance:	lwer hours are not all accounted for due to a budget cap when the budget was developed.		
Projections as of Jan 17, 2023	Dollars Projected for Month:		276,690.69	
	Actual Dollars Used:		322,579.93	
	Variance (Projected minus Actual):		-45,889.24	
	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 at Complete	RR	HPI
	Current Goal:	1961		
	Goal at Completion:	7060	76%	
	Current Actual:	1960	46%	4.63
	Estimate at Complete:		76%	
	Variance:			
Other Measures	Goals and actuals include R + Inf iws.			

Project Name	(HRS 2022 Panel & Baselines) Health and Retirement Study 2022 Main Interviews		
Project Mode	Primary: Mixed Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	Direct Budget: 13,982,815.00	Indirect Budget: 5,033,815.00	Total Budget: 19,016,630.00
Principal Investigator/Clients	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 1: Deborah Zivan		
	Production Manager 2: Jennifer C Arrieta		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.		
SRO Project Period	01/2021 - 05/2023		
Data Col Period	03/2022 - 04/2023		
Security Plan	NA		
Milestones	<div>Pre Production Start: 01/01/2021Pretest Start: 11/01/2021Pretest End: 11/23/2021Recruitment Start: 08/01/2021Staffing Complete: 01/15/2022GIT Start: 02/21/2022SS Train Start: 02/23/2022SS Train End: 03/03/2022DC Start: 03/07/2022DC End: 07/29/2023</div>		
Other Project Team Members	Derek Dubuque (Production Manager), Andrea Sims (Production Manager), Theresa Camello (Production Manager), Taghreid Lovell (Production Manager), Milagros Hierro (Production Manager), Deborah Zivan (Project Manager), Andrew Hupp (Project Manager), Gary Hein (Project Manager), Erin McSpadden (Project Manager), Daniah Buageila (Project Manager), Janet McBride (Project Assistant), Paul Burton (Stats/Sampling), Vanessa Clarke (Project Assistant), Jeannie Baker (Project Manager), Melissa Luker (Project Assistant), Anthony Romanowski (Project Manager), Megan Hromco (Project Assistant). Kristen Cross (Project Assistant), Austin De Spirito (Project Assistant) Tech Team: Karl Dinkelmann, Jeff Smith, Jim Rodgers, Laura Yoder, Marsha Skoman, Ashwin Dey, Pam Swanson, David Bolt, Deb Wilson, Jennie Williams, Rose Zybdel, Stephanie Windisch, Holly Ackerman, Shane Empie, Kelly Chatain		
Other Project Name	HRS 2022 Main Iws		
Sample Mgmt System	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 payment of cash (reimbursed/reconciled via Tenrox) (Rpay system set up for MSMS); Imprest Cash Fund from ISR Business Office (Rpay system set up for MSMS)		
Report Period	Dec, 2022 (HRS 2022 Panel & Baselines)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Throughout the month of December, -Interviewer's were instructed to continue 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), payment and letter request processing, and testing.		

-Technical development continued with SurveyTrak, Weblog, WebTrak, MSMS, and reports.
 -Limited effort protocol was implemented in early December.
 -Datamodels 1 & 2 suspends (n=180 households) migration process continued to return the cases to the field.
 -Planning started for a late April training - aiming to train 120+ interviewers.
 -As of December 31, all non-final web panel sample moved to interviewer administered for non-response follow-up.
 The web panel team were preparing for a training in January on the web panel protocol and MSMS.

*As of 1/17/23, the measures in table reflect both Panel and Baseline interviews combined.

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.	
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Cost as of Jan 17, 2023	Total Cost to Date (direct + indirect):	12,278,510.14
	Est Cost at Completion (E\$AC):	19,124,465.56
	Total Budget:	19,016,630.00
	Variance (Total Budget minus- E\$AC):	-107,835.56

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. The increase in variance since last month is due to staff hours (primarily interviewer hours) exceeding projections by 11%.

Projections as of Jan 17, 2023	Dollars Projected for Month:	923,019.62
	Actual Dollars Used:	886,524.94
	Variance (Projected minus Actual):	36,494.68

Reason for Variance: December salary costs were significantly over projections primarily due to interviewer hours. Non-salary costs were significantly under projections due to unused costs for training, respondent payments and travel. The unused costs were pushed forward to future months.

Measures		Units at Complete	RR	HPI
	Current Goal:	11,583	47%	8.3
	Goal at Completion:	22,164	61%	8.2
	Current Actual:	11,536	46.6%	9.3
	Estimate at Complete:	22,164	61%	11.7
	Variance:	0	0	3.5

Other Measures
 Panel: Goal RR:74%, Current RR: 50.2%
 Baselines: Goal RR:44%, Current RR: 25%

Project Name	(HRS HOC) Health and Retirement Study – Historical Occupation Coding		
Project Mode	Primary: Data Processing		
Project Type	Sponsored Projects		
Budget	Direct Budget: 67,762.90	Indirect Budget: 24,394.16	Total Budget: 92,157.06
Principal	David Weir (SRC)		
Investigator/Clients	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 1:		
	Production Manager 2:		
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		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name	HRS Historical Coding		
Sample Mgmt System	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	Dec, 2022 (HRS HOC)	Planning	
Risk Level	Some Concerns		
Monthly Updates	During the month of December, - Stan-continued crosswalk work based on meeting with client. - Jeannie - meetings with PI, Stan and cost report meeting/budget analyst.		
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 - Stan Hasper notified the project on Jan 16, 2023 that he is retiring soon, date tbd. Transition plan not yet clear for this project.		
Cost as of Jan 17, 2023	Total Cost to Date (direct + indirect):	11,526.05	
	Est Cost at Completion (E\$AC):	90,987.98	
	Total Budget:	92,157.06	
	Variance (Total Budget minus- E\$AC):	1,169.08	
	Reason for Variance:	Minimal variance projected.	
Projections as of Jan 17, 2023	Dollars Projected for Month:	3,474.87	
	Actual Dollars Used:	1,594.84	

Reason for Variance: Variance is due to staff hours; not as much project management was needed in Dec as originally projected.

Measures		Units at 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		
Budget	Direct Budget: 21,264,149.00	Indirect Budget: 7,655,093.00	Total Budget: 28,919,242.00
Principal Investigator/Clients	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 1: Andrew L Hupp Production Manager 2:		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample.		
SRO Project Period	02/2021 - 01/2024		
Data Col Period	03/2022 - 01/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: 04/19/2022 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	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 Cash Fund from ISR Business Office		

Report Period	Dec, 2022 (HRS2022-Screening)		Implementing
Risk Level	Some Concerns		
Monthly Updates	<p>Cases continue to be flagged for the follow-up protocol. The 12-week mark for releases 2 and 3 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.</p> <p>A document detailing the follow-up procedure can be found here. https://docs.google.com/spreadsheets/d/1aPZW0VSaYxJXAxJAR1okgYAHr1_vWyDhEj-lqvDnxro/edit#gid=0</p> <p>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.</p> <p>The next training (February) has the goal of recruiting 40 people to exclusively screen. A larger training of at least</p>		

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 was submitted in December (it did not contain any screening materials). After reviewing the screening design (all cases going to web first), it was determined that we need to make some modifications to some of the materials (both respondent and interviewer). Since there are no field first cases, the interviewer will need the web materials in their doorstep toolkit. We are modifying the look of the envelope of the reminder packet mailing. It will have an SRC logo printed on the lower right (like a sticker) rather than the rather plain white envelope with small logo in the return address. We are bringing back the postcard that was used with the first batch of web cases. It will be a final reminder and the language has been updated to mention an interviewer will be in their area soon (language that used to be in the field first prenotification letter).

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 as of Jan 16, 2023	Total Cost to Date (direct + indirect):	7,594,208.95
	Est Cost at Completion (E\$AC):	29,114,085.14
	Total Budget:	28,919,242.00
	Variance (Total Budget minus- E\$AC):	194,843.14
	Reason for Variance:	Actual interviewer hours were higher than projections in December (currently reflected in the overrun). The review and revision of interviewer projections and goals, was not possible before this report was due. The review and revisions of goals and projections may reduce this overrun.
Projections as of Jan 16, 2023	Dollars Projected for Month:	1,028,667.43
	Actual Dollars Used:	659,016.96
	Variance (Projected minus Actual):	369,650.47
	Reason for Variance:	--Expected costs from the September training did not hit, those costs have been moved forward to January, and money allocated for respondent payments was lower than budgeted (also moved forward).

Measures		Units at Complete	RR	HPI
	Current Goal:	3,600/1,500 HHs	73%	3.0
	Goal at Completion:			
	Current Actual:	993/909	21.1%	3.82
	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		
Budget	Direct Budget: 358,900.61	Indirect Budget: 200,983.92	Total Budget: 559,884.53
Principal Investigator/Clients	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 1: Sarah Elisa Broumand		
	Production Manager 2: 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		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
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 Name			
Sample Mgmt System	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	Dec, 2022 (IHDS3)		Implementing

Risk Level	Some Concerns
Monthly Updates	<p>In December we completed the Kannada and Gujarati translations and released the project to production with no hiccups. We were happy to learn that no issues came up during our holiday absence.</p> <p>We have made adjustments to our labor hours but it will be difficult to reduce this overrun.</p> <p>To mitigate these 2 issues we did the following:</p> <ol style="list-style-type: none"> 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. <p>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.</p>

Special Issues			
Cost as of Jan 10, 2023	Total Cost to Date (direct + indirect):		522,544.16
	Est Cost at Completion (E\$AC):		573,563.64
	Total Budget:		559,884.53
	Variance (Total Budget minus- E\$AC):		-13,679.11
	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 as of Jan 10, 2023	Dollars Projected for Month:		10,605.97
	Actual Dollars Used:		17,212.26
	Variance (Projected minus Actual):		-6,606.29
	Reason for Variance:	Data Model changes and troubleshooting merge issues continue to items that are hard to minimize any further. We have so many data models, migrations and merges that have to be worked on and fixed when thigs arise.	

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

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		
Budget	Direct Budget: 309,813.00	Indirect Budget: 80,551.00	Total Budget: 390,364.00
Principal Investigator/Clients			
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 1:		
	Production Manager 2:		
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		
Milestones	<div><div><div>Pre Production Start:</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start: 11/29/2021</div><div>DC Start: 01/26/2022</div></div><div><div>Pretest Start:</div><div>Recruitment Start: 09/16/2021</div><div>GIT Start:</div><div>SS Train End: 12/02/2021</div><div>DC End: 07/07/2023</div></div></div>		
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 Name			
Sample Mgmt System	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	Dec, 2022 (MI CReSS (Year 3))		Implementing
Risk Level	On Track		
Monthly Updates	Sample replicate 11 was released as planned. Discovered in December that Arealink was not sending out text messages from 800 line. We got the problem		

resolved, but this resulted in sending out text to remaining participants much later than planned. This could have potentially also caused a higher number of lower hours used since the text messages with the survey links did not go out as part of the invite.

Special Issues

Cost as of Jan 10, 2023	Total Cost to Date (direct + indirect):	132,863.49
	Est Cost at Completion (E\$AC):	403,996.23
	Total Budget:	390,364.00
	Variance (Total Budget minus- E\$AC):	338.33
	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 as of Jan 10, 2023	Dollars Projected for Month:	49,266.78
	Actual Dollars Used:	64,575.10
	Variance (Projected minus Actual):	-15,308.32
	Reason for Variance:	The variance is due to 2 reasons. 1) this was a 6 week period rather than the usual 4 week. Projections had distributed hours evenly across all months. 2) There was an increase of lower and TL time.

Measures		Units at 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:	2,604	69% (67%-Web/33% Tel)	4.52
	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		
Budget	Direct Budget: 6,267,988.00	Indirect Budget: 3,510,072.00	Total Budget: 9,778,060.00
Principal Investigator/Clients	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 1: James Koopman Production Manager 2:		
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.</p> <p>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		
Milestones	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div style="width: 45%;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Hueichun Peng Technical Lead (WebSMS programmer) Brad Goodwin Data Management (Minako is providing support) Ashwin Dey SurveyTrak, WebTrak and MTF specific Apps. Programmer Kyle Goodman and Deborah Wilson Help Desk/Tablet support		
Other Project Name			
Sample Mgmt System	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		
<hr/>			
Report Period	Dec, 2022 (MTF Base Year 2022_27)		Implementing
Risk Level	On Track		
Monthly Updates	December 2022 - 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). All training materials, bulk supplies, laptops and cell phones were mailed as planned to interviewers on 12/16. Training begins on 1/11/23.
- the temps. and Help Desk also began work on preparing the new tablets (1100) for production (unpacking, asset tagging, running updates) - they were all configured in December and ready for the survey to be loaded..
- Staffing plan confirmed - 28 IVERs, 4 TLs. We were aiming for 40 IVERs, 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.

Special Issues

Cost as of Jan 17, 2023	Total Cost to Date (direct + indirect):	819,715.06
	Est Cost at Completion (E\$AC):	9,244,798.76
	Total Budget:	9,778,060.00
	Variance (Total Budget minus- E\$AC):	533,261.24

Reason for Variance: Current projections result in an underspend of \$533,261 for the five year grant period.
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. Wave 1 (2023)
- 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 all survey administrations will be conducted FTF i.e. SRO interviewer will 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.
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).

Projections as of Jan 17, 2023	Dollars Projected for Month:	69,588.69
	Actual Dollars Used:	32,898.10
	Variance (Projected minus Actual):	36,690.59

Reason for Variance: Variance - key staff were not able to work as planned in December and we received a considerable refund (\$27k) for costs incorrectly charged to SRO.

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

Other Measures

Project Name	(MTF HID 22) MTF High Intensity Drinking 2022																											
Project Mode	Primary: Web Total of Modes: 1																											
Project Type	Sponsored Projects																											
Budget	Direct Budget: 301,160.00		Indirect Budget: 167,822.00 Total Budget: 468,982.00																									
Principal	Megan Patrick (University of Michigan)																											
Investigator/Clients																												
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 1: Production Manager 2:																											
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																											
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>																											
Other Project Team Members	Kirsten Alcser, Donnalee Grey-Farquharson, Hueichun Peng, Hongyu Johnson, Minako Edgar																											
Other Project Name																												
Sample Mgmt System	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	Dec, 2022 (MTF HID 22)		Closing																									
Risk Level	On Track																											
Monthly Updates	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 project has ended successfully in December 2022. Data Collection - Production ended in April 2022. <table> <tr> <td>Type</td> <td>Details</td> <td>Total sample</td> <td>Total started (partial)</td> <td>Total Completes</td> <td>% (Completes</td> </tr> <tr> <td>Annual</td> <td>Annual</td> <td>1108</td> <td>22</td> <td>743</td> <td>67.06</td> </tr> <tr> <td>Diary D_1</td> <td></td> <td>743</td> <td>3</td> <td>668</td> <td>89.91</td> </tr> <tr> <td>Diary D_2</td> <td></td> <td>743</td> <td>5</td> <td>638</td> <td>85.87</td> </tr> </table>				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
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 as of Dec 31, 2022	Total Cost to Date (direct + indirect):	340,299.13
	Est Cost at Completion (E\$AC):	340,299.13
	Total Budget:	468,982.00
	Variance (Total Budget minus- E\$AC):	128,682.87
	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 as of Dec 31, 2022	Dollars Projected for Month:	4,176.33
	Actual Dollars Used:	1,627.89
	Variance (Projected minus Actual):	2,548.44
	Reason for Variance:	Work completed with less effort than expected.

Measures		Units at 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		
Budget	Direct Budget: 2,496,935.00	Indirect Budget: 1,398,282.00	Total Budget: 3,895,217.00
Principal	John Schulenberg (UM-SRC)		
Investigator/Clients	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 1:		
	Production Manager 2:		
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		
Milestones	Pre Production Start:Pretest End:Staffing Complete:SS Train Start:DC Start:Pretest Start:Recruitment Start:GIT Start:SS Train End: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 Name	MTF		
Sample Mgmt System	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	Dec, 2022 (MTF Panel 2022-27)		Implementing
Risk Level	On Track		
Monthly Updates	1. Management - Project Timeline has been created and shared with MTF Staff. 2. System Putting final touches on the refinement of the RLM system. Working with ICPSR and MTF Staff to continue development of the Respondent Portal. Sample management system development will begin in January. 3. Data Collection - N/A		
Special Issues			
Cost as of Dec 31, 2022	Total Cost to Date (direct + indirect):		560,194.16

Est Cost at Completion (E\$AC):		3,905,070.03		
Total Budget:		3,895,217.00		
Variance (Total Budget minus- E\$AC):		-9,853.03		
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. Increased recharge rates are reflected.		
Projections as of Dec 31, 2022	Dollars Projected for Month:	32,941.74		
	Actual Dollars Used:	14,812.32		
	Variance (Projected minus Actual):	18,129.42		
	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. Project team will revisit and streamline projections for future months.		
Measures		Units at 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		
Budget	Direct Budget: 828,581.00	Indirect Budget: 464,004.00	Total Budget: 1,292,585.00
Principal	Narayan Sastry (University of Michigan)		
Investigator/Clients	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 lavorska-Em		
	Production Manager:		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Camila Kendall		
	Production Manager 2:		
Proposal #	no data		
Description	SRO will work with the PIs and a local survey firm in Puerto Rico, Estudios Técnicos (ETI), to develop a sample frame, sample design, questionnaire and data collection protocols for both pilot data collection (in 2022) and baseline data collection (in 2023). DMSS will provide assistance with sample design and implementation, responsive design, panel maintenance issues, and creation of sample weights. SRO will update the PSID-21 Spanish instrument for use specifically in PR. SRO will assist with the preparation of training materials for Listing training, Pretest and Main Data collection and will travel to PR to be on-site for these trainings. SRO will define reports for production and quality control monitoring that will be programmed through the SurveyTrak system, and train the research team on using these reports. All data will be collected by ETI's interviewers in PR and will be encrypted and transmitted daily via SurveyTrak to a secure SRC server. SRO will also assist with data processing.		
SRO Project Period	01/2022 - 12/2023		
Data Col Period			
Security Plan	NA		
Milestones	<div>Pre Production Start: 10/01/2021</div> <div>Pretest End:</div> <div>Staffing Complete:</div> <div>SS Train Start:</div> <div>DC Start:</div> <div>Pretest Start:</div> <div>Recruitment Start:</div> <div>GIT Start:</div> <div>SS Train End:</div> <div>DC End: 12/31/2023</div>		
Other Project Team Members	Marsha Skoman--Tech Lead Raphael Nishimura--Sampling		
Other Project Name			
Sample Mgmt System	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	Dec, 2022 (PR-PSID)		Implementing
Risk Level	On Track		
Monthly Updates	<div>Listing Updates: 2 laptops have bricked. PR PIs were able to assign the IWERs new laptops from the extras on-hand. SRO has not sent any additional replacement laptops.</div> <div>SRO worked with listers on a few blocks that needed corrections. DMSS sent a file with the list of cases that have GPS coordinates in Field Maps, but where no SID was entered so we cannot link the coordinates back to the ELP SIDs to the PIs. The listers are working to correct the Field Maps data issues.</div> <div>DMSS is working to create a new separate map in Field Maps for the largest block that was subsampled.</div> <div>There are some inaccessible blocks that listers have not been able to list. Listers have had problems gaining access to gated communities -- the PI is working to help the listers gain access. Additionally, police instructed our</div>		

listers not to enter a segment where there has been recent gang violence. Per PR PIs, this block may become accessible in January or February -- they will confirm with the police. If listers are unable to enter this segment, SRO will discuss sampling options that can be implemented in lieu of the listing.

Listing effort is proceeding at a rate of approximately 50 blocks per weekend -- expecting listing effort to continue until mid-February if production proceeds at the same rate. However, not all of the listers will be returning in January. Only 20 listers, 80% of the current staff, will continue to work on this effort.

Listing effort was suspended from December 23 until January 9th due to UPR's closure for the holidays.

Main Data Collection:

PI and SRO made a decision on Blaise Instrument Development. PR-PSID will pull the Core 2023 Spanish CATI instrument once it is stable (around March - April) and will begin programming the PR content. Subsequently, PR-PSID will update the final version of the Core23 instrument to add all of the PR-PSID content. This instrument will not be released during 2023, but will be tested and prepared as the starting point for Core 2025 development. PR-PSID will present this plan to the Core PIs.

SRO continued to prepare GIT materials for the translators.

Special Issues	Work scope for Spanish translations was underbudgeted (U-M, non-SRO budget).			
Cost as of Jan 17, 2023	Total Cost to Date (direct + indirect):			193,808.15
	Est Cost at Completion (E\$AC):			1,290,203.99
	Total Budget:			1,292,585.00
	Variance (Total Budget minus- E\$AC):			2,381.01
	Reason for Variance:	Projected underrun decreased due to adding projections for a Spanish Speaking temp resource.		
Projections as of Jan 17, 2023	Dollars Projected for Month:			29,791.01
	Actual Dollars Used:			19,125.31
	Variance (Projected minus Actual):			10,665.70
	Reason for Variance:	Mainly due to underrun in tech salary categories. Technical development for the main data collection effort has not yet begun as projected.		
Measures		Units at 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		
Budget	Direct Budget: 47,456.00	Indirect Budget: 0.00	Total Budget: 47,456.00
Principal	Katherine McGonagle (PSID)		
Investigator/Clients			
Funding Agency	NSF, NIA, NICHD, The Office of the Assistant Secretary for Planning and Evaluation of the United States, DHHS, The Economic Research Service of the United States Department of Agriculture, HUD, DOL, The Center on Philanthropy at the Indiana University-Purdue University		
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 1: Production Manager 2:		
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		
Milestones	<div> <div> Pre Production Start: 04/01/2022 Pretest End: Staffing Complete: SS Train Start: DC Start: 07/01/2022 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 11/30/2022 </div> </div>		
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 Name			
Sample Mgmt System	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	Dec, 2022 (PSID23 Online Contact		Closing
Risk Level	On Track		
Monthly Updates	Per PI request, TSG queried MSMS data for the list of SIDs that did not receive the email reminder in November. List of SIDs was provided to PSID. Web survey was deactivated by Blaise Admins first thing 12/16. Final Production Update: 1561 Web Completes (260 from TAS sample, 1,301 from PSID Core Sample). PI planning to schedule a debriefing session in January with SRO and PSID staff. Added projections for the Data Manager, Database Administrator, and Blaise Admin in May for project archiving.		

Ivanna will check for costs incurred Feb-April, but is not planning to generate a cost report during that period. Final cost report will be pulled in June after archiving is completed.

Special Issues

Cost as of Jan 17, 2022	Total Cost to Date (direct + indirect):	45,566.31
	Est Cost at Completion (E\$AC):	46,932.87
	Total Budget:	47,456.00
	Variance (Total Budget minus- E\$AC):	523.13
	Reason for Variance:	Underrun decreased due to added projections for project archiving -- added hours for the data manager, Database Administrator (senior) , and Blaise Admin (App Programmer/Analyst Sr).

Projections as of Jan 17, 2022	Dollars Projected for Month:	2,115.90
	Actual Dollars Used:	1,197.41
	Variance (Projected minus Actual):	918.49
	Reason for Variance:	Data Manager charged less than projected -- DM needed less time for final data delivery than anticipated.

Measures		Units at 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		
Budget	Direct Budget: 5,030,748.00	Indirect Budget: 0.00	Total Budget: 5,030,748.00
Principal Investigator/Clients	Katherine McGonagle (UM-SRC-PSID)		
	Narayan Sastry (UM-SRC-PSID)		
	Esther Friedman (UM-SRC-PSID)		
Funding Agency			
IRB	HUM#: HUM00062417	Period of Approval: 3/22/22-3/21/23	
Project Team	Project Lead: Rachel Anne Orlowski		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager: Stacy Quisenberry		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Daric Thorne		
	Production Manager 2: 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		
Milestones	<div> <div> Pre Production Start: 03/01/2022 Pretest End: 10/31/2022 Staffing Complete: SS Train Start: DC Start: 03/16/2023 </div> <div> Pretest Start: 10/11/2022 Recruitment Start: 09/19/2022 GIT Start: SS Train End: DC End: 02/28/2024 </div> </div>		
Other Project Team Members			
Other Project Name	PSID Core 2023		
Sample Mgmt System	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 (reimbursed/reconciled via Tenrox) (PSID will handle check & e-payment via RAPS)		

Report Period	Dec, 2022 (PSID23)	Implementing	
Risk Level	Some Concerns		
Monthly Updates	Performance Test:		

Five Pretest interviewers used the current PSID23 DCA/protocol on top of a system load similar to PSID21 to test the MSMS sync improvements. Test occurred from 12/15 - 12/21. Interviewers were instructed to mimic real production w/o contacting respondents - for example: work in blocks of time, vary mode/outcome of attempts, schedule appointments, transfer sample, and complete CATI/web interviews. When comparing to PSID21 metrics, there have been remarkable improvements in MSMS sync. Interviewers were unable to perform initial Blaise sync of the empty data model without Help Desk intervention because CMT was performing an emergency back-up at the same time. SRO has been in communication w/ CMT about the issue and is also developing a HD tool to measure available bandwidth to help troubleshoot this issue in the future.

English Sample Release Plan:

PIs decided on 12/13 to release English sample across three weeks, starting with 50 web cases on 3/16. The next two web releases will remain small (250 and 1,000) cases with the next two splitting the remaining web cases (~3600 each). All CATI cases (~1300) will be released at once on 3/20. The plan will allow us to evaluate whether web production is meeting budgeted goals for non-interviewer intervention before finalizing new hire staffing decisions.

Training:

On 12/22, PI approved revised T1 plan: Conduct an accelerated training with a small subset of T1 PSID21-experienced interviewers (~7) and field leaders (~8) during the weeks of 3/6 and 3/13, and launch production on 3/16 with sample assigned to this subset of interviewers and field leaders. The majority of T1 on-staff interviewers (~40) will be trained during the weeks of 3/27 and 4/3. On-going discussion w/ the PIs about holding T2 with new hires (~60) in mid-May vs. early June. The timing of T2 will impact plans for T3 with the remaining on-staffers (~12). Visited Novi Sheraton--a new training location for SRO--on 12/22, as it was the least expensive viable option. Training material development and training sample creation underway.

Roadrunner Experiment:

Due to the sizable overrun, the PIs and SRO are looking for ways to reduce costs. The PIs approved a plan to end interviewing early for a known subset of cases, which will be announced to respondents at launch. These "roadrunner" treatment cases will be compared to a set of control cases with the traditional 12/31 end date. Final details of the experiment are forthcoming.

Technical development:

Continued English Blaise CATI and web fixes, as well as Spanish Blaise CATI testing and fixes. TSG is working to resolve system-wide Blaise upload/download errors. On-going programming and testing of Production INT1 project. Refined MSMS saliva collection protocol and screen design. Also made necessary adjustments data preload/post-load due to PIs changing saliva sample definition on 12/20. Preparing for MSMS core development NAPE improvements. Utilized updated DIM. Continued work on Team Locating within the 68ID Site.

DMSS:

Graduate students helped with saliva respondent material development and literature search for saliva consent regulations and best practices as well as best practices for saliva collection. Regular staff worked on mapping saliva respondents and on-staff interviewers to identify areas for new hire recruitment. Outlined saliva reporting needs. Eager for new statistician to join SRO in January to begin production reporting work. The Proposal Group made PI-requested changes to the saliva rebudget.

Special Issues	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. Was unable to hire a project lead for the saliva collection.			
Cost as of Jan 18, 2023	Total Cost to Date (direct + indirect):		526,673.10	
	Est Cost at Completion (E\$AC):		5,231,582.39	
	Total Budget:		5,030,748.00	
	Variance (Total Budget minus- E\$AC):		-200,834.39	
	Reason for Variance:		Primarily driven by assigned vs. budgeted resources due to staff departures; adding TL involvement in pre-production; increasing the Survey Tech, Iwer II, and Iwer 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 as of Jan 18, 2023	Dollars Projected for Month:		154,544.57	
	Actual Dollars Used:		108,870.02	
	Variance (Projected minus Actual):		45,674.55	
	Reason for Variance:		MSMS specification and development work was split between the interview and saliva efforts, so some time projected under the interview budget hit the saliva budget. With pushing back the new hire training, recruitment work has been delayed. DMSS was waiting for new staff to be hired to begin reporting work. Managers charged less time than projected due to availability. Interviewers charged less time than projected for the start of the performance test. Note: Unable to separate Core IDC costs from Contact Update IDC costs. Cost values only reflect Direct Costs.	
Measures		Units at 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		
Budget	Direct Budget: 1,251,758.00	Indirect Budget: 0.00	Total Budget: 1,251,758.00
Principal	Joanne Hsu (SCA)		
Investigator/Clients	Tuba Suzer-Gurtekin (SCA)		
Funding Agency			
IRB	HUM#: HUM00216780		Period of Approval: N/A-- Exempt
Project Team	Project Lead: Theresa Camelo Budget Analyst: Dean E Stevens Production Manager: Lisa J Carn Senior Project Advisor: Shonda R Kruger-Ndiaye Production Manager 1: Production Manager 2:		
Proposal #	no data		
Description	<p>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.</p> <p>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.</p>		
SRO Project Period	12/2021 - 12/2022		
Data Col Period	01/2022 - 12/2022		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: 12/27/2021 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 12/20/2022 </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	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	Dec, 2022 (SCA 2022)		Closing
Risk Level	On Track		
Monthly Updates	SCA DEC began as scheduled on Monday 11/21, and ended on schedule on MON 12/20. We completed 600 IWs (320/180/100) meeting the monthly goals precisely, at a cumulative HPI of 2.85 (0.15 lower than the budgeted 3.0).		
Special Issues			
Cost as of Jan 17, 2023	Total Cost to Date (direct + indirect):		1,203,302.36
	Est Cost at Completion (E\$AC):		1,206,077.18
	Total Budget:		1,251,758.00
	Variance (Total Budget minus- E\$AC):		45,680.82
	Reason for Variance:		Lower than budgeted HPI.
Projections as of Jan 17, 2023	Dollars Projected for Month:		122,603.80

Project Name	(SRS 2023) Social Relations 2023		
Project Mode	Primary: Face to Face	Total of Modes: 1	
Project Type	Sponsored Projects		
Budget	Direct Budget: 2,881,925.00	Indirect Budget: 1,613,877.00	Total Budget: 4,495,802.00
Principal Investigator/Clients	Toni Antonucci (ISR) Kristine Ajrouch (ISR) Laura Zahodne (ISR)		
Funding Agency	NIH		
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Barbara Lohr Ward Budget Analyst: Christine Evanchek Production Manager: Veronica Connors-Burge Senior Project Advisor: Nicole G Kirgis Production Manager 1: Taghreid Lovell Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 3400 interviews with respondents aged 35 years or older residing in the tri-county area of Southeast Michigan (Wayne, Oakland and Macomb counties) and 244 interviews with Social Relations sample members aged younger than 65 years of age. The project involves screening up to 6900 new sample lines., with one selected respondent per household. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements (height, weight, blood pressure, grip strength) and saliva collection. The SRS 2023 project will use the same instrument programmed for the D-Amp project, with the only new programming being that for a screener. The screener will be translated into Arabic. No informant or proxy interview is included in the project scope. Interviews will be conducted in English or Arabic.		
SRO Project Period	09/2021 - 05/2023		
Data Col Period	05/2023 - 04/2024		
Security Plan	NA		
Milestones	Pre Production Start: 09/01/2022 Pretest End: Staffing Complete: 04/01/2023 SS Train Start: 05/18/2023 DC Start: 05/30/2023 Pretest Start: Recruitment Start: 02/01/2023 GIT Start: 05/16/2023 SS Train End: 05/24/2023 DC End: 04/30/2023		
Other Project Team Members	Ian Ogden, Mathew Luna, Veronica Connors-Burge, Taghreid Lovell, Jeff Smith (Tech Lead), others TBD		
Other Project Name	Social Relations 2022, DAWN, Social Relations 2023		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	DRI-CARI		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Cash, prepaid (\$70)		
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)		

Report Period	Dec, 2022 (SRS 2023)		Planning
Risk Level	On Track		
Monthly Updates	Initial planning meetings held with the research team to review work scope and discuss timeline. Drafted initial project schedule. Drafted a specification for recruitment and training, which was used to request RFQs for training sites. Conducted initial meetings to confirm staffing for the project, review scope Began drafting RFQ for procurement.		
Special Issues	The pre-production timeline is very short. The PI indicated that there would be a number of questionnaire changes, which were not anticipated in the budget.		
Cost as of Jan 10, 2023	Total Cost to Date (direct + indirect):		48,060.80
	Est Cost at Completion (E\$AC):		4,913,461.53

Total Budget:	4,495,802.00
Variance (Total Budget minus- E\$AC):	-417,659.53
Reason for Variance:	The project started at the request of the PIs, before funding from the sponsor was confirmed in writing. The newly awarded budget is not yet in the system, nor are projections. The current projections are out of date. We are in the process of updating both budget and projections. No cost report is available in the system -- budgets are in the process of being entered.

Projections as of Jan 10, 2023 Dollars Projected for Month:	0.00
Actual Dollars Used:	669.12
Variance (Projected minus Actual):	-669.12
Reason for Variance:	The project started at the request of the PIs, before funding from the sponsor was confirmed in writing. No cost report is available in the system -- budgets are in the process of being entered.

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

Other Measures

<i>Actual Dollars Used:</i>	103,821.99
<i>Variance (Projected minus Actual):</i>	18,781.81

Reason for Variance: Lower than budgeted HPI in 10 of the 12 survey months.

Measures		Units at Complete	RR	HPI
	<i>Current Goal:</i>	600		3.0
	<i>Goal at Completion:</i>	600		3.0
	<i>Current Actual:</i>	600		2.85
	<i>Estimate at Complete:</i>	600		2.85
	<i>Variance:</i>	0		-0.15

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		
Budget	Direct Budget: 8,196,521.00	Indirect Budget: 4,590,892.00	Total Budget: 12,809,390.00
Principal Investigator/Clients	James Wagner (University of Michigan) Robert Ursano (Uniformed Services University of the Health Science) 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 1: Jeffrey Albrecht Jr Production Manager 2: 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		
Milestones	<div> <div> Pre Production Start: 04/01/2022 Pretest End: Staffing Complete: 10/01/2022 SS Train Start: 11/14/2022 DC Start: 11/07/2022 </div> <div> Pretest Start: Recruitment Start: 07/23/2022 GIT Start: SS Train End: 11/17/2022 DC End: 04/15/2024 </div> </div>		
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 Name	STARRS-LS Continuation		
Sample Mgmt System	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)
<hr/>	
Report Period	Dec, 2022 (STARRS-LS Waves 3 & 4) Implementing
Risk Level	On Track
Monthly Updates	<p>Project Management and Planning:</p> <ul style="list-style-type: none"> ? We sent weekly production updates to the PIs, and reported on progress on the call with the Army/M&RA. ? Meredith created the agenda/notes and facilitated the weekly meeting with the STARRS project managers. ? We carried out bi-weekly meetings with M&RA to coordinate Safety Plan and respondent locating activities. ? U-M's Year 4 budget package was sent to USUHS on December 5. ? Plans for STARRS beyond Wave 4: <ul style="list-style-type: none"> o The ballpark budget for the new NSS (STARRS-LS Sample Refresher) was sent to Dr. Ursano on December 21. ? IRB: <ul style="list-style-type: none"> o The ORIO for 68 Replicate 1 letters that were mailed to wrong addresses was acknowledged by the U-M IRB on December 9 and by the USUHS IRB on December 27. <p>Enclave and User Support:</p> <ul style="list-style-type: none"> ? Annual Security Controls Review: We awaited word from M&RA on when the 2022 review will take place. ? Annual Security Training Renewal 2023: We continued to receive completed STARRS Annual DoD Training Renewal training materials from enclave users. The final completion due date is 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: <ul style="list-style-type: none"> o We sent an initial set of blood sample counts [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] to Dr. Ursano on December 5. Meredith met with the USUHS team on December 15 to review the information in the tables, answer questions and discuss some additional requirements. Meredith and Lisa Lewandowski-Romps met to discuss the new requirements on December 21. o We continued to assist USUHS with a researcher's request for NDI data for SHOS-B cases. ? There were no biomarker group requests needing assistance in December. <p>Public Use Data:</p> <ul style="list-style-type: none"> ? Biosample flags, administrative variables, and inventory document: We awaited funding for this work (but U-M can start on the IRB submission in early 2023). The work scope includes 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. ? 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. <p>Wave 4 Production Updates:</p> <ul style="list-style-type: none"> ? Wave 4 production statistics, as of January 9, 2023, are as follows: <ul style="list-style-type: none"> o Replicates released: 2 of 14 released with 1,615 sample lines. o Completed interviews: 827 (786 web; 41 phone) o The first interviewer calling for Wave 4 began on December 2 when Replicate 1 moved to Phase 3. Phase 4 (continued calling; \$100) began on December 28. And the current response rate is 65.4% o Replicate 2 was released on December 12. By January 9, it was in phase 3 and receiving phone calls. The response rate is currently 40.0%. ? Respondent Newsletter: <ul style="list-style-type: none"> o As of December 18, the STARRS-LS Newsletter had been sent to all Replicates. <p>Safety Plan Results:</p> <ul style="list-style-type: none"> ? The Wave 4 Safety Plan rate is 9.8% as of January 9

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 W3 survey instrument time for CATI and associated costs for recruiting and interviewing respondents, increased hours for programming W3 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. So far, the Wave 4 survey is running about 7-8 minutes shorter than Wave 3, so our projections should be on the conservative side, at least in terms of CATI administration times. After completing three or four Wave 4 replicates, we will have updated production statistics that can be used to update the Wave 4 projected hours/costs. 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 (Table 5 above). As decisions are made, we will work with the research team to schedule and implement this work.

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

Cost as of Nov 30, 2022	Total Cost to Date (direct + indirect):	6,333,528.21
	Est Cost at Completion (E\$AC):	12,886,179.19
	Total Budget:	12,809,390.00
	Variance (Total Budget minus- E\$AC):	-76,789.19
	Reason for Variance:	We spent a total of \$286,417 in November. The remaining hours/cost transfers from the SRO overhead (contingency) account posted to the Year 3 accounts in November. Our projected deficit for the total five-year project remained about the same at \$76,789 (from \$75,315 in October). We will continue to review project expenses and update our projections based on realized costs and our experiences to date. See also Special Issues section.

Projections as of Nov 30, 2022	Dollars Projected for Month:	317,840.85
	Actual Dollars Used:	286,416.59
	Variance (Projected minus Actual):	31,424.26
	Reason for Variance:	A number of Wave 4 training costs did not come through in November; these projections were moved forward.

Measures	Units at Complete	RR	HPI
Current Goal:		75	9
Goal at Completion:		75	9
Current Actual:		Undef	7.5
Estimate at Complete:			
Variance:			

Other Measures

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

Other Measures

Developmental/Initiative Projects Dashboard

[illegible]

Project Name	(TSME23 DCO Tech System Support FY2023) TSME23-DCO Tech System Support (483248) 2023		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 35,000.00	Indirect Budget: 0.00	Total Budget: 35,000.00
Principal Investigator/Clients			
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 1:		
	Production Manager 2:		
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		
Milestones	<div> <div>Pre Production Start:</div> <div>Pretest End:</div> <div>Staffing Complete:</div> <div>SS Train Start:</div> <div>DC Start:</div> </div> <div> <div>Pretest Start:</div> <div>Recruitment Start:</div> <div>GIT Start:</div> <div>SS Train End:</div> <div>DC End:</div> </div>		
Other Project Team Members	Max Malhotra Shaowei Sun		
Other Project Name			
Sample Mgmt System	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	Dec, 2022 (TSME23 DCO Tech System	Initiation	
Risk Level	Some Concerns		
Monthly Updates	We have been migrating the Iwer website on the old Drupal site to the new Iwer website to Wordpress platform. The original plan was to do most of our updates in PROD and to have CMT migrate them to DEV but that process failed immediately because CMT could not keep up with our needs. We now do our updates in PROD and only use DEV for major changes/experimentation. We have found this to be much more sustainable.		
Special Issues			
Cost as of Jan 10, 2023	Total Cost to Date (direct + indirect):	40,692.48	
	Est Cost at Completion (E\$AC):	40,692.48	
	Total Budget:	35,000.00	
	Variance (Total Budget minus- E\$AC):	-5,692.48	
	Reason for Variance:	implementation of new iwer website	
Projections as of Jan 10, 2023	Dollars Projected for Month:	0.00	
	Actual Dollars Used:	4,964.24	
	Variance (Projected minus Actual):	-4,964.24	
	Reason for Variance:	implementation of new iwer website	

Project Name	(TSME23-PIPPA) PIPPA 2.0 (425198) FY23		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 10,000.00	Indirect Budget: 0.00	Total Budget: 10,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Mark Simonson		
	Budget Analyst:		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	PIPPA application on the ODS Server		
SRO Project Period	01/1996 - 01/1996		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Sarah Broumand, Cheng Zhou, Andrew Piskorowski		
Other Project Name			
Sample Mgmt System	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	Dec, 2022 (TSME23-PIPPA)		Implementing
Risk Level	On Track		
Monthly Updates	A lot of progress was made on the implementation for Scoring Iwers in PIPPA. The front end was developed and demonstrated to Grant that does the following: 1. Loads the list of all Iwers 2. Allows one or more Iwer to be selected to assign a score 3. User is able to set the default scoring weights and generate a score for all interviewers 4. User is able to adjust scores for a subset of interviewers 5. User can override a score manually 6. Any changes to the default scoring is recorded for future reference (the user and scoring weighting used) 7. Users can export the score grid into CSV		
Special Issues			
Cost as of Jan 10, 2023	Total Cost to Date (direct + indirect):	7,534.10	
	Est Cost at Completion (E\$AC):	10,451.62	
	Total Budget:	10,000.00	
	Variance (Total Budget minus- E\$AC):	-451.62	
	Reason for Variance:	Additional work done to catch up on new features.	
Projections as of Jan 10, 2023	Dollars Projected for Month:	1,167.87	

Actual Dollars Used:

1,427.67

Variance (Projected minus Actual):

-259.80

Reason for Variance:

Additional work done to catch up on new features.

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

Other Measures

Project Name	(TSME23-QC-Systems (483249)) TSME23-QC-Systems (483249)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 30,000.00	Indirect Budget: 0.00	Total Budget: 30,000.00
Principal Investigator/Clients			
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 1:		
	Production Manager 2:		
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		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	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	Dec, 2022 (TSME23-QC-Systems)		Implementing
Risk Level	On Track		
Monthly Updates	Overall, OLIVE remains actively used and has remained stable for a few years now. December 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 as of Dec 31, 2022	Total Cost to Date (direct + indirect):		18,007.21
	Est Cost at Completion (E\$AC):		30,977.84
	Total Budget:		30,000.00
	Variance (Total Budget minus- E\$AC):		-977.84
	Reason for Variance:		Small variance.
Projections as of Dec 31, 2022	Dollars Projected for Month:		1,092.63

<i>Actual Dollars Used:</i>	2,138.63
<i>Variance (Projected minus Actual):</i>	-1,046.00

Reason for Variance: next month we will be back on track.

Measures		Units at 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		
Budget	Direct Budget: 10,000.00	Indirect Budget: 0.00	Total Budget: 10,000.00
Principal Investigator/Clients			
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 1:		
	Production Manager 2:		
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		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Andrew Piskorowski - writing stored procedure to summary all appointments Mark Simonson - possible manager interface for entering management parameters Peter Sparks - Blaise Developer (R facing page) James Rodgers - consultant as needed for MSMS		
Other Project Name			
Sample Mgmt System	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	Dec, 2022 (TSME23-SelfSchedUI (483424))		Implementing
Risk Level	On Track		
Monthly Updates	<p>Andrew H. had a working meeting with Andrew P. about the design. Just prior to the break, Andrew P. delivered the first version of the stored procedure that Peter's service will call to get the information to display in Blaise to the subject. Peter will use that when we return to finish his work on updating the service to call this stored procedure to get the available slots, and any existing appointment information.</p> <p>In January, Andrew H. will meet with the PSID team on whether any information that we write off (i.e., email, phone, and text permission) should be written to different fields in MSMS.</p> <p>Andrew H., Andrew P., and Peter will meet weekly in January as we prepare for implementation. The currently plan is to intergrate with PSID INT2.</p>		
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 as of Jan 18, 2023	Total Cost to Date (direct + indirect):	2,306.03
	Est Cost at Completion (E\$AC):	8,597.61
	Total Budget:	10,000.00
	Variance (Total Budget minus- E\$AC):	1,402.39
	Reason for Variance:	

Projections as of Jan 18, 2023	Dollars Projected for Month:	2,518.49
	Actual Dollars Used:	718.65
	Variance (Projected minus Actual):	1,799.84
	Reason for Variance:	Andrew P. did the bulk of his work just prior to the holiday, which delayed Peter from doing any work in December.

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

Other Measures