
Survey Research Operations

Monthly Project Report

Sponsored Data Collection Projects and Development Initiative

February 2023





























































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
(BHM Library Project) Developing a Model of Black History Month Programming in Public Libraries
(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
(DCUS) Daily Cannabis Use Study
(ECHO (Year 7)) Environmental Influences on Child Health Outcomes
(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
(Health and Well Being in SE MI) Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan)
(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 Panel 2022-27) Monitoring the Future Panel 2022-2027
(PR-PSID) Puerto Rico Panel Study of Income Dynamics
(PSID CDS 2023) PSID Childhood Development Supplement 2023
(PSID23) Panel Study of Income Dynamics Core 2023
(PSID23 Online Contact Update) Panel Study of Income Dynamics 2023 Online Contact Update
(QoL & Hearing Loss) Quality-of-Life for Amish Children with Hearing Loss
(SRS 2021) Social Relations 2023
(STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study
(TSME SRO SYS MAINTENANCE-GENERAL(483910)) TSME SRO SYS MAINTENANCE-GENERAL(483910)
(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
(WJ-RAP) Woodcock-Johnson Remote Administration Project

Sponsored Projects Dashboard

NonArchived Sponsored Projects

Project	Type	Phase	Project Lead	Jan	Feb
<i>AFHS</i>	Sponsored	Closing	Rebecca Gatward		
<i>AFHS-Additional work</i>	Sponsored	Implementing	Rebecca Gatward		
<i>BFY</i>	Sponsored	Implementing	Piotr Dworak		
<i>BHM Library Project</i>	Sponsored	Initiation	Karin Schneider		
<i>CARE Military</i>	Sponsored	Implementing	Donnalee Ann Grey-Farquharson		
<i>CARE SALTOS MTEC</i>	Sponsored	Implementing	Donnalee Ann Grey-Farquharson		
<i>CRUSE - AHDFS</i>	Sponsored	Implementing	Piotr Dworak		
<i>DCUS</i>	Sponsored	Initiation	Gary Hein		
<i>ECHO (Year 7)</i>	Sponsored	Implementing	Shonda R Kruger-Ndiaye		
<i>EDC-Endline</i>	Sponsored	Implementing	Barbara Lohr Ward		
<i>EDC-SS Phases 3-4</i>	Sponsored	Closing	Karin Schneider		
<i>HCAP 2022</i>	Sponsored	Implementing	Maureen Joan O'Brien		
<i>Health and Well Being in SE MI</i>	Sponsored	Implementing	Barbara Lohr Ward		
<i>HRS 2022 Panel & Baselines</i>	Sponsored	Implementing	Evanthia Leissou		
<i>HRS HOC</i>	Sponsored	Planning	Gloria J Baker		
<i>HRS2022-Screening</i>	Sponsored	Implementing	Evanthia Leissou		
<i>IHDS3</i>	Sponsored	Implementing	Sarah Elisa Broumand		
<i>MI CReSS (Year 3)</i>	Sponsored	Implementing	Sarah Elisa Broumand		
<i>MTF Base Year 2022_27</i>	Sponsored	Implementing	Rebecca Gatward		
<i>MTF Panel 2022-27</i>	Sponsored	Implementing	Donnalee Ann Grey-Farquharson		
<i>PR-PSID</i>	Sponsored	Implementing	Shonda R Kruger-Ndiaye		
<i>PSID CDS 2023</i>	Sponsored	Initiation	Piotr Dworak		
<i>PSID23</i>	Sponsored	Implementing	Rachel Anne Orlowski		
<i>PSID23 Online Contact Update</i>	Sponsored	Closing	Camila Kendall		
<i>QoL & Hearing Loss</i>	Sponsored	Implementing	Margaret Lee Hudson		
<i>SCA 2023</i>	Sponsored	Initiation	Theresa Camelo		
<i>SRS 2021</i>	Sponsored	Implementing	Barbara Lohr Ward		
<i>STARRS-LS Waves 3 & 4</i>	Sponsored	Implementing	Meredith A House		
<i>WJ-RAP</i>	Sponsored	Implementing	Hongyu Johnson		

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	Feb, 2023 (AFHS)		Closing	
Risk Level	On Track			
Monthly Updates	<div>February update</div> <div>Since last month the overspend on the main AFHS project decreased due to a refund 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 Mar 16, 2023	Total Cost to Date (direct + indirect):		2,508,608.12	
	Est Cost at Completion (E\$AC):		2,508,608.12	
	Total Budget:		2,490,133.00	
	Variance (Total Budget minus- E\$AC):		-18,475.12	
	Reason for Variance:	February 2023 update - Since last month the overspend on the main AFHS project decreased by \$560 due to a refund for uncashed cheques. This overspend will be funded using sequestering funds.		
Projections as of Mar 16, 2023	Dollars Projected for Month:		0.00	
	Actual Dollars Used:		-873.60	
	Variance (Projected minus Actual):		873.60	
	Reason for Variance:	Any additional spend will be charged to the short code for the 'AFHS additional work' - the overspend from the main AFHS and the additional work are being funded by sequestering funds. The overspend is decreasing due to reversed respondent checks that were issued 12 months ago and not cashed.		
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>Pre Production Start:</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:</div>
Other Project Team Members	Grant Benson Senior Project Advisor 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	
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	Feb, 2023 (AFHS-Additional work)	Implementing
Risk Level	On Track	
Monthly Updates	February updates SRO involvement is now minimal - responding to queries from a group of students working on data documentation and preparation of a data file to pass to ICPSR for review and further work (although an initial file will be 'launched' at the PAA conference in April. This work includes creating a draft codebook and merging 'IsVisited' data so missing values are appropriately assigned as 'refusal' or 'does not apply' for question and computed variables. The PI group are expecting to submit a new research proposal for the AFHS Panel in July 2023. SRO are working on a budget for this proposal - currently awaiting updated sample numbers to match a revised designm.	
Special Issues		
Cost as of Mar 16, 2023	Total Cost to Date (direct + indirect):	54,246.30
	Est Cost at Completion (E\$AC):	61,163.43
	Total Budget:	50,265.00
	Variance (Total Budget minus- E\$AC):	-10,898.43
	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 total cost at completion for the feasibility work is still within the budgeted estimate (\$47k-\$53k). Hours for Colette and I have been added to provide minimal support (up to 6hrs/mth) until Sept'23 which raises the amount to be covered by sequestering funds by an additional ~\$7,000. An updated summary of costs to be funded by sequestering funds is attached.
Projections as of Mar 16, 2023	Dollars Projected for Month:	985.51
	Actual Dollars Used:	421.56
	Variance (Projected minus Actual):	563.95
	Reason for Variance:	Colette and I have up 6 hrs projected a month between now and

September 2023 for any adhoc requests and meeting attendance (me)
- we will only use these hours as needed and hours used will vary by month.

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	(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)	
<hr/>		
Report Period	Feb, 2023 (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 April 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 2/17 we have handed off 743 of 1,000 cases.</p> <p>PIs confirmed they will require U-M Interviewers assistance through the end of the Age 4 which they are planning to extend through July 31, 2023. PIs have also reached out to project SPA to discuss ongoing assistance with locating in Ages 5 through 8.</p> <p>The details of this engagement are being worked out but will require retaining the current data collection staff at the current fraction to support this effort in the next 4 years.</p> <p>We also 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 ~ 50 cases so far with a goal to find and invite to the lab and will ingest more around the holidays.</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 844 cases were delivered to the lab</p> <p>We are currently preparing for a locating trip to NOLA to assist the site which is struggling the most in reaching the lab cooperation goals.</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: A notification was sent to the PIs on 1/20 estimating 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.</p>	

Special Issues				
Cost as of Mar 16, 2023	Total Cost to Date (direct + indirect):			6,447,088.39
	Est Cost at Completion (E\$AC):			6,711,984.26
	Total Budget:			6,986,749.73
	Variance (Total Budget minus- E\$AC):			274,765.47
	Reason for Variance:		In January, we have adjusted the budget to realize all potential sources of underrun given the current scope and communicated underrun nearing ~ \$300K to the PIs. This resulted in extending the Valhalla funding period through 12/31/2023 allowing potential extension of U-M involvement with the project. However, the decision about how to use the underrun still rests with the PIs.	
Projections as of Mar 16, 2023	Dollars Projected for Month:			51,663.71
	Actual Dollars Used:			42,495.37
	Variance (Projected minus Actual):			9,168.34
	Reason for Variance:		Lower hours were accurately projected but we continue to have savings in the project 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	(BHM Library Project) Developing a Model of Black History Month Programming in Public Libraries		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 126,712.00	Indirect Budget: 70,959.00	Total Budget: 197,671.00
Principal Investigator/Clients	Deborah Robinson (ISR)		
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Karin Schneider		
	Budget Analyst:		
	Production Manager:		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	SRO will support the project in the first year by working with you to design the sample. SRO will support the implementation of up to two pilot surveys and the larger national survey of libraries. We will provide consultation on scale development throughout the pilot phase and provide statistical support to finalize the scales and provide a working dataset (with weights to account for the stratified sample design). In total, the SRO period of performance will be approximately 24 months in duration, starting in February of 2023, with data collections for the pilots and national survey taking place over approximately 12 months, starting in late 2023.		
SRO Project Period	02/2023 - 02/2025		
Data Col Period	10/2023 - 09/2024		
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	Developing a Model of Black History Month Programming in Public Libraries		
Sample Mgmt System	Web SMS		
Data Col Tool	Blaise 5		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Not used		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Feb, 2023 (BHM Library Project)		Initiation
Risk Level	On Track		
Monthly Updates	Still in development phase -- we have done some work to get the sample files ready.		
Special Issues	None		
Cost as of Mar 16, 2023	Total Cost to Date (direct + indirect):		3,974.10
	Est Cost at Completion (E\$AC):		191,134.24
	Total Budget:		197,671.00
	Variance (Total Budget minus- E\$AC):		6,536.76
	Reason for Variance:	Less start-up activity conducted than was actually planned. Raphael just started to revise the sample files for selection.	
Projections as of Mar 16, 2023	Dollars Projected for Month:		9,764.74
	Actual Dollars Used:		3,974.10

Reason for Variance:

Less start-up activity conducted than was actually planned. Raphael just started to revise the sample files for selection.

Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	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	Feb, 2023 (CARE Military)		Implementing
Risk Level	On Track		
Monthly Updates	1. Project Management: SRO is expecting to receive additional fund \$260K total to continue military data collection beyond May 2023. The		

Sample size will not be increased per the initial agreement with the additional funding.
 IRB approved to grant the locating team to make calls directly to respondents via Social Medias.
 Donnalee continues the dialogue with UM PI to discuss endgame strategies and to plan for the next round of data collection.
 We also continue to discuss the locating reports with the Locating Team for its accuracy.

2. Care SMS system update:

A decision of a downtime (break) between the current wave and the next wave is two weeks instead of one month as previously proposed. SRO is working a plan to make the transition.
 Target groups have been flagged and assigned strategically to the interviewers.
 SRO has been coordinating system testing with QG to prepare the upcoming production period.
 SRO requested QG to send bulk emails to specific group of respondents due to the diligent work of the SRO project staff.

3. Questionnaire Development:

SRO updated modified questionnaire to the PI staff for programming.

4. Production:

SRO continue to strategize towards the goal of 3000 military cases by the end of data collection in April 2023.
 SRO continue to find ways to launch more interviewer production challenges for the next few month.
 A plan to extend the effort of sending the emails to respondents by using UM Gmail by all interviewers is in the work.
 Production managers and TLs continue to conduct biweekly field calls for additional training as needed.
 Production Stats as of 02/28/2023:
 12792 Released: Total Comp lws-2706 -25.8% (Web-2666 -25.4%, CATI-40 -0.4%)

5. Hiring and Training:

We start to prepare the remote Interviewer refresh training in May 2023 (May 17 through May 19) that will focus on reinforcing field protocols and explaining system and survey questionnaire updates.

6. DMSS:

A new data manager has joined the SRO project team.
 SRO has been working with the Datalys to investigate some missing key components in the daily data delivery reports since January 2023.
 SRO started data clean up conversation with Datalys

7. Locating:

Two current interviewers joined the Locating Team. The Locating team continues to use the full spectrum of messages approved by IRB to communicate with the respondents.
 Military find rate: 445 found/ 1061 (ever Loc)= 41.94%

Special Issues				
Cost as of Feb 28, 2023	Total Cost to Date (direct + indirect):			1,069,302.57
	Est Cost at Completion (E\$AC):			1,373,899.16
	Total Budget:			1,426,001.00
	Variance (Total Budget minus- E\$AC):			52,101.84
	Reason for Variance:			A lot of work on military have not been reflected to the current cost report. We have been making adjustment to reduce the underrun through the next few months.
Projections as of Feb 28, 2023	Dollars Projected for Month:			152,896.87
	Actual Dollars Used:			104,440.74
	Variance (Projected minus Actual):			48,456.13
	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)			
<div></div>				
Report Period	Feb, 2023 (CARE SALTOS MTEC)		Implementing	
Risk Level	On Track			
Monthly Updates	<div>1. Project Management: SRO is strategizing to prioritize target groups to reach the goals of production. Donnalee continues the dialogue with UM PI to discuss endgame strategies and to plan for the next round of data collection. Donnalee is still waiting for QG to deliver the data on Social Media platforms performance in order to evaluate the efficiency of using them. SRO continues to discuss the locating reports with the Locating Team for its accuracy. SRO is working with the CARE team on managing sample transferring situation in order to maintain sample accuracy. IRB approved to grant the locating team to make calls directly to respondents via Social Medias.</div> <div>2. Care SMS system update: A decision of a downtime (break) between the current wave and the next wave is two weeks instead of one month as previously proposed. SRO is working a plan to make the transition. SRO continues to work closely with QuesGen on system updating, modifying, and testing activities (such as the ability to see all the note data by using the hover feature) as well as finding ways to improve respondent Payment tab functionality in the system. In the meantime, SRO continues to encounter and resolve system related issues brought by respondents and interviewers. SRO has been coordinating system testing with QG to prepare the upcoming production period. SRO requested QG to send bulk emails to specific group of respondents due to the diligent work of the SRO project staff. Target groups have been flagged and assigned strategically to the interviewers.</div> <div>3. Questionnaire Development: SRO updated modified questionnaire to the PI staff for programming.</div> <div>4. Production: SRO continue to strategize towards the goal of 3200 military cases by the end of data collection in April 2023. SRO continue to find ways to launch more interviewer production challenges for the next few month. A plan to extend the effort of sending the emails to respondents by using UM Gmail by all interviewers is in the work. Production managers and TLs continue to conduct biweekly field calls for additional training as needed. Production Stats as of 02/28/2023: 13044 Released: Total Comp lws-2814 – 26.7% (Web-2773 -26.3%, CATI-41-0.4%)</div> <div>5. Hiring and Training: One TL left the project for her other project commitment. We continue to negotiate with other projects regarding sharing and/or releasing interviewers. These changes will become effective in spring 2023. We start to prepare the remote Interviewer refresh training in May 2023 ((May 17 through May 19) that will focus on reinforcing field protocols and explaining system and survey questionnaire updates.</div> <div>6. DMSS: A new data manager has joined the SRO project team. SRO has been working with the Datalys to investigate some missing key components in the daily data delivery reports since January 2023. SRO started data clean up conversation with Datalys</div> <div>7. Locating: 2 current interviewers joined the Locating Team. The Locating team continues to use the full spectrum of messages approved by IRB to communicate with the respondents. Civilian find rate: 262 found/ 792 (ever loc) = 33.21%</div>			
Special Issues				
Cost as of Feb 28, 2023	Total Cost to Date (direct + indirect):		970,049.64	
	Est Cost at Completion (E\$AC):		4,678,297.75	
	Total Budget:		4,685,914.00	
	Variance (Total Budget minus- E\$AC):		7,616.25	
	Reason for Variance:			
Projections as of Feb 28, 2023	Dollars Projected for Month:		77,313.11	
	Actual Dollars Used:		87,536.90	
	Variance (Projected minus Actual):		-10,223.79	
	Reason for Variance:			
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			

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	Feb, 2023 (CRUSE - AHDFS)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Crypto reached the proposed response rate of 15% but is falling shy of the goal of 1546 interviews. This is because RR4 calculations underpinning the proposal response rate assumed 95 - 97% occupancy rate. Crypto		

data collection so far yielded 1237 interviews about 300 less than the proposal goal of 1,546. SPA and the samplers agreed that the best strategy is to augment the sample by additional 4671 lines (added to 10240) to reach the goal. Estimated cost of sample purchase, and additional mailings will be covered by the current underrun. The plan was approved by the PI agreeing to a slight extension to the project timeline to allow the mailings to play out. We estimate 8% return on the invitation and Reminder 1 mailing which should be enough to achieve the study goal. Release 5 sample size and mailing dates are listed below.

Prior to Release 5 Coinbase approved incentive increases from \$30 - \$50, however, higher incentive, and our redesigned end-game mailing sent out on 2/20 to ~ 9,100 cases yielded only ~ 150 additional completes. The mailing was affected by weather disruptions and slower delivery.

Crypto Releases and invitation dates:

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
 5 3/27: 4671, Invitation mailing 3/27, reminder 1 mailing 4/3
 Total: 14,911

On March 25, SSL is winding down Crypto shifts. Between 3/25 and 4/14 we will have reduced staff of 1 TL and 2 interviewers who will continue supporting Rs who call-in with issues and do limited calling to priority cases (suspends, cases previously reached via the appended phone numbers, etc.)

SSL effort is excellent with high dials per hour, texting, calling priority lines, however, the number of surveys completed after the calls is very low (only ~ 20 per month).

Sample balancing:

The sample continues to be well-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:

Crypto continues to build underrun attributable to lower billings by staff at all levels and inability to fill the projected iwer hours. The underrun will sufficiently cover the sample augment and additional mailings.

Special Issues		
Cost as of Mar 16, 2023	Total Cost to Date (direct + indirect):	403,021.89
	Est Cost at Completion (E\$AC):	540,664.11
	Total Budget:	635,344.00
	Variance (Total Budget minus- E\$AC):	94,679.89
	Reason for Variance:	Underrun is mostly due to savings in management and tech costs as well as not reaching the projected iwer hours. Lower actual hours allowed us to extend the lab involvement through mid-March and fund additional sample required to meet the goal.
Projections as of Mar 16, 2023	Dollars Projected for Month:	114,487.96
	Actual Dollars Used:	41,456.50
	Variance (Projected minus Actual):	73,031.46
	Reason for Variance:	Monthly underrun was in part due to projecting vendor/Dataforce costs to be paid in February. The \$26K invoices are being processed and will be paid in March along with extra cost of additional mailings to the sample augment.

Measures		Units at Complete	RR	HPI
	Current Goal:	1529	14.9%	
	Goal at Completion:	1529	14.9%	
	Current Actual:	1237	14.7%	
	Estimate at Complete:	1529	14.9%	
	Variance:			

Other Measures

Project Name	(DCUS) Daily Cannabis Use Study		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 41,311.46	Indirect Budget: 0.00	Total Budget: 41,311.46
Principal	Brady West (ISR)		
Investigator/Clients	Sean McCabe (ISR)		
Funding Agency	National Institutes of Health (NIH)		
IRB	HUM#: HUM00229404	Period of Approval: Pending	
Project Team	Project Lead: Gary Hein Budget Analyst: David Kellermeyer Production Manager: Senior Project Advisor: Rebecca Gatward Production Manager 1: Rebecca Loomis Production Manager 2:		
Proposal #	no data		
Description	This study aims to decipher the daily motives for cannabis use among light and heavy cannabis users, and their associations for longer-term use behaviors. We will recruit 50 cannabis users via the MICHHR database and assign them to into groups of 25 'light' users and 25 'heavy' users based on a screener survey. Selected candidates will be asked to complete a baseline survey of about 10 or 15 minutes, 28 daily surveys of about 5 minutes, and a follow up survey of 15-20 minutes. Respondents will be paid up to \$96 for participating (\$2 per daily survey completion for up to 28 days, \$20 for the baseline survey completion and \$20 for the follow up survey completion).		
SRO Project Period	01/2023 - 05/2023		
Data Col Period	04/2023 - 05/2023		
Security Plan	Yes		
Milestones	<div> <div> Pre Production Start: 01/17/2023 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	Gary Hein - Project Lead Rebecca Gatward - SPA Rebecca Loomis - Project Manager Davis Kellermeyer - Budget Analyst Wen Chang - Stats lead Ji Qi - Statistician Laura Yoder - Data Manager		
Other Project Name	Transitions in Daily Motives for Cannabis Use and Their Associations for Longer-Term Use Behaviors		
Sample Mgmt System	Other (Manual)		
Data Col Tool	Other (Qualtrics)		
Hardware	[UM cell] Phone		
DE Software	N/A		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Other (Tango Code)		
Payment Method	Other (E-mail via Tango)		

Report Period	Feb, 2023 (DCUS)	Initiation	
Risk Level	On Track		
Monthly Updates	All hours in February spent in pre-production working on: 1- Project charter 2- Writing and submitting the initial IRB application, including writing project consent, finalizing four survey instruments, developing data management and security plan, and writing e-mail and text invitations 3- Meeting with PIs and SRO team to discuss the project design		
Special Issues			
Cost as of Mar 17, 2023	Total Cost to Date (direct + indirect):	4,126.92	
	Est Cost at Completion (E\$AC):	26,593.95	

Total Budget:		41,311.46		
Variance (Total Budget minus- E\$AC):		22,597.51		
Reason for Variance:		Differences in between proposed and projected scope: 1- Project management was budgeted at the survey director level, but I'll be leading the project and I was billed a survey specialist Intermediate. 2- I'm programming all of these instruments myself, so programming hours based on specification are lower. 3- Work scope for data management is limited, so projections have been reduced in line with this scope.		
Projections as of Mar 17, 2023	Dollars Projected for Month:	3,618.06		
	Actual Dollars Used:	3,618.06		
	Variance (Projected minus Actual):	0.00		
	Reason for Variance:	None		
Measures		Units at Complete	RR	HPI
	Current Goal:	50	75%	N/A
	Goal at Completion:	50	75%	N/A
	Current Actual:	N/A	N/A	N/A
	Estimate at Complete:	50	75%	N/A
	Variance:	0	0%	N/A
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 Lokers: Financial Analyst
Jeff Smith: Technical Lead
Mark Simonson: Data Manager (Phase 1)
Brad Goodwin: Data Manager (Phase 2)
Jennie Williams: Data Manager (Phase 3)
Jeff Smith: SurveyTrak Systems Programmer
Ashwin Dey: Systems Programmer
Hueichun Peng: CAI Programmer-Illume
Peter Sparks: CAI Programmer-Blaise
Shaowei Sun: Biospecimen Logging Application Programmer
Deb Wilson: Help Desk

Other Project 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	Feb, 2023 (ECHO (Year 7))	Implementing
Risk Level	On Track	
Monthly Updates	[Phase 1: Recruitment and Prenatal Surveys] The MARCH recruitment target was 1,110 mothers / live births. Recruitment is done and the final count is 1,113. ----- [Phase 2: 3-Month Data Collection Summary as of 3/20/23] 3-month sample released: 1018 3-month interviews completed: 730 Average attempts / lw: 7.6 lw length: 36 min Response Rate: 72% 3-month biospecimen collected: 414 ----- [Phase 3: Age 4 REDCap Survey as of 3/20/23] Age-4 sample released: 320 REDCap surveys completed: 218 Response Rate: 68% ----- [Phase 3: Age 4 In-Person Visit Protocols as of 3/20/23] Age-4 IPV sample released: 170 In-person visits completed: 50	

Special Issues	There is still interest on the part of the U-M PI to roll any unused SRO funds into blood spot analysis. Ny the end of April SRO must specify an estimate of funds that could be deobligated. SRO is still working with MSU to define close out procedures for each component.
-----------------------	--

Cost as of Mar 16, 2023	Total Cost to Date (direct + indirect):	253,256.99
	Est Cost at Completion (E\$AC):	516,140.11
	Total Budget:	599,091.00
	Variance (Total Budget minus- E\$AC):	82,950.89
	Reason for Variance:	We're now projecting hours that would allow us to complete (but not significantly exceed) our originally-budgeted Y7 work scope of 144 3 mo iws and 50 Age 4 in-person iws. The biggest driver of our projected underrun is management, which is reflective of staffing constraints in PDMG and the lean/distributed leadership model we adopted. Several

non-sal categories also came in low. The largest of these was hosting due to our canceled iwer training.

Projections as of Mar 16, 2023	Dollars Projected for Month:	39,831.48
	Actual Dollars Used:	35,575.90
	Variance (Projected minus Actual):	4,255.58

Reason for Variance: Iwer hours and travel came in lower than projected. Per our PM, iwer hours we suppressed due to ooto/vacations.

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-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> Pre Production Start: 09/01/2022 Pretest End: Staffing Complete: 02/27/2023 SS Train Start: 03/20/2023 DC Start: 03/27/2023 </div> <div> Pretest Start: Recruitment Start: 02/01/2023 GIT Start: SS Train End: 03/24/2023 DC End: 08/19/2023 </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)	
<hr/>		
Report Period	Feb, 2023 (EDC-Endline)	Implementing
Risk Level	On Track	
Monthly Updates	<p>NOTE: The EDC cost-to-complete projection is now showing a large underrun, due to the research team's decision to place in-person work on hold (Jan 24, 2023 decision). They have not yet received NIH funding for in-person work.</p> <p>During February 2023, SRC activities on the EDC Midline and EDC Endline project included the following:</p> <p>Task 1 Midline: Management, Budget and Work Plan</p> <ul style="list-style-type: none"> Reviewed cost reports, expenses, investigated late charges. Investigated/transferred late charges Prepared financial statements. <p>Task 1 Endline: Management, Budget and Work Plan</p> <ul style="list-style-type: none"> Participated in project meetings with ORL to discuss scope, cost projections and schedule for EDC Endline Financial <ul style="list-style-type: none"> Reviewed monthly project expenses for Midline and Endline. Updated projections and produced reports. Programming/Specification <ul style="list-style-type: none"> Reviewed/specified further Endline questionnaire edits for telephone, provided to programmer Conducted repeated rounds of questionnaire testing, managed bug log Conducted testing of the self-scheduler, managed bug log Facilitated ORL testing of the questionnaire Tested SurveyTrak and the self-scheduler Researched errors in skip patterns, MQDS Training preparation <ul style="list-style-type: none"> Finalized training agenda for a virtual telephone training Began writing/revising manual chapters, training exercises Ordered supplies for training. Developed schedule for training materials printing and production Began formatting materials for printing <p>Task 2: Sampling</p> <ul style="list-style-type: none"> No activity this month <p>Task 3: Questionnaire Development</p> <ul style="list-style-type: none"> Conducted testing on the Endline telephone instrument See Management Task for other questionnaire development activities <p>Task 4: CAI Programming</p> <ul style="list-style-type: none"> Continued programming Endline telephone questionnaire changes resulting from testing, further specification development. <p>Task 5: Systems Programming</p> <ul style="list-style-type: none"> Sample Management Systems <ul style="list-style-type: none"> Finalized SurveyTrak specifications for Endline Telephone Conducted interative rounds of testing in SurveyTrak, resolved bugs and re-tested Prepared testing preload for SurveyTrak, Self-Scheduler and Blaise applications Updated QR codes for texts and emails 	

- o Prepared additional testing lines for SurveyTrak and Blaise
- Self-Scheduler
- o Prepared preload and sample lines for testing
- o Conducted testing; made adjustments to fix bugs
- Reporting systems
- o Updated data dictionaries for preload & deliverables

Tasks 6, 7: Interviewer Recruitment & Hiring, Training

- Reviewed/revised virtual training agenda for interviewers and team leaders; made adjustments as necessary
- Began work on training materials

Task 8: Main Data Collection

- No activity this month

Task 9: Post Collection Processing

- No activity this month

Task 10: Weighting

- No activity this month

Task 11: Final Data Deliverables

- No activity this month

Special Issues

Areas Requiring Attention:

Current Updates:

- Work on the in-person portion of the data collection was officially put on hold on Jan 24, 2023.
- We are projecting a large underrun on the EDC Endline project. Projections for in-person work have been removed from the financial system, given the uncertainty as to whether that part of the project will move forward. The cost reports now reflect only the telephone survey work. A contingency for cancellation of the training contract has been included in the cost projection.
- We continue to project a substantial underrun for the Midline project
- o 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.
- o Hours per interview are exceptionally low due to heavy use of the self-scheduler. Final overall HPI: 3.01.

Approved EDC Endline Work Scope Changes

- Per agreement with ORL, SRO staff continued to work to prepare the Endline in-person survey instruments through mid-January 2023, 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.
- Work on the in-person survey was officially put on hold on Jan 24, 2023.

Cost as of Mar 16, 2023	Total Cost to Date (direct + indirect):	250,395.10
	Est Cost at Completion (E\$AC):	1,712,881.61
	Total Budget:	3,097,511.00
	Variance (Total Budget minus- E\$AC):	1,384,629.39

Reason for Variance:

The in-person component of the survey data collection has been put on hold because NIH has not awarded funds. The research team made the decision on Jan 24, 2023 to put preparation for the in-person survey on hold.

Projections as of Mar 16, 2023	Dollars Projected for Month:	80,315.69
	Actual Dollars Used:	71,879.62
	Variance (Projected minus Actual):	8,436.07

Reason for Variance:

Most of the variance is in salary categories. We had projected Admin Assistant hours for recruitment, however new hire recruitment was put on hold -- only on-staffers will be used for the Telephone survey. Projections are being updated. Programming was lower than anticipated, again due to the fact that the in-person survey protocol has been put on hold.

Measures		Units at Complete	RR	HPI
	Current Goal:	2721	91%	3.0
	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	Pre Production Start:		Pretest Start:
	Pretest End:		Recruitment Start:
	Staffing Complete:		GIT Start:
	SS Train Start:		SS Train End:
	DC Start:		DC End: 01/31/2023
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	Feb, 2023 (EDC-SS Phases 3-4)		Closing
Risk Level	On Track		
Monthly Updates	No updates, project closing.		
Special Issues	None		
Cost as of Mar 16, 2023	Total Cost to Date (direct + indirect):		316,110.31
	Est Cost at Completion (E\$AC):		316,110.31
	Total Budget:		408,935.00
	Variance (Total Budget minus- E\$AC):		92,824.69
	Reason for Variance:	See previous months' report - travel was originally planned and budgeted, but project did all phone interviewing.	
Projections as of Mar 16, 2023	Dollars Projected for Month:		13,662.78
	Actual Dollars Used:		10,674.95

Reason for Variance:

We should not have projected as much as we did for this last month of activity.

Measures		Units at Complete	RR	HPI
	Current Goal:	117	97	5
	Goal at Completion:	117	97	5
	Current Actual:	117	97	6.7
	Estimate at Complete:	117	97	6.7
	Variance:			1.7

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	Feb, 2023 (HCAP 2022)		Implementing
Risk Level	Some Concerns		
Monthly Updates	<p>HCAP production has been underway for 35 weeks. As of this morning, 2,733 interviews have been completed, including 1,490 R and 1,243 Inf. There are currently 175 appts (115 R, 60 Inf). The overall HPI is 4.77. 196 Spanish interviews have been completed (113 R, 83 Inf). There are currently 28 interviewers on staff. 843 more R sample lines will be released to Iwers on April 3.</p> <p>Given the overrun due to the budget cap for 2020 that resulted in lowering Iwer hours. We have shared 3 different cost to close scenarios with the PI, showing effort and RRs of the 3 sample groups, and estimated yield and cost. CRS will be updated to reflect updated costs once the PI has reviewed the scenarios. Field goals will be updated as well (MO). HCAP and HRS staff have been working together to determine a more accurate estimated HCAP sample count, and put checks in place to ensure that the HCAP flag is removed from HRS preload who are deceased.</p> <p>All cost scenarios assume the project ends in August 2023 as projected, and that there will not be another</p>		

interviewer training. If another training is needed, cost to close would need to be updated. At this point we are not expecting the need for an additional training, but it is dependent on lwer retention for the next 6 months.

One area the project has seen efficiencies is in project management. We are currently \$368,600 under what was projected. We have been discussing other ways to cut costs to decrease the overrun. The Pls have suggested removing one sample type, the Recontacts. This group did not complete their HCAP 2016 interview. 208 Recons have already been released to HCAP and we have done 78 interviews. They require more contacts per interview than the other sample, about 6 contacts average. The Pls are very interested in HRS Proxy sample, so we are prioritizing those sample lines, both R and Inf. Since some Recons are Proxies, we will need to consider keeping the Recon Proxies in the sample.

The IRB amendment to allow verbal phone consent for informants is under review. We have updated the consent screens in Blaise and are testing these, and created an informant brochure that will either be mailed to the Inf by the lwer or left at the Inf's home if they reside with the R. Also included in this amendment is non-monetary TOAs.

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 Mar 16, 2023	Total Cost to Date (direct + indirect):	2,543,322.46		
	Est Cost at Completion (E\$AC):	4,926,655.11		
	Total Budget:	4,488,000.00		
	Variance (Total Budget minus- E\$AC):	-438,655.11		
	Reason for Variance:	Cost to close will be updated once PI has reviewed 3 cost/RR scenarios. This will be discussed at Exec on 3/22 if PI has still not decided so that this can be updated by the end of this week. MO		
Projections as of Mar 16, 2023	Dollars Projected for Month:	300,910.24		
	Actual Dollars Used:	256,589.42		
	Variance (Projected minus Actual):	44,320.82		
	Reason for Variance:			
Measures		Units at Complete	RR	HPI
	Current Goal:	2661		
	Goal at Completion:	6338	69%	
	Current Actual:	2402	57.2%	4.77
	Estimate at Complete:		69%	
	Variance:			
Other Measures	Goals and actuals include R + Inf iws.			

Project Name	(Health and Well Being in SE MI) 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: 2,409,055.00	Indirect Budget: 1,349,072.00	Total Budget: 3,758,127.00
Principal	Kristine Ajrouch (Life Course Development Program, SRC)		
Investigator/Clients	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.		
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: 04/10/2023</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: 05/25/2023</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); Other (\$2 screener incentive)		
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)		
Report Period	Feb, 2023 (Health and Well Being in SE MI)		Implementing
Risk Level	Attention!		
Monthly Updates	During February 2023, SRC activities on the DAWN projects included the following: Task 1: Management, Budget and Work Plan <ul style="list-style-type: none">• Held meetings with the DAWN research team to discuss study planning, budget, scope and schedule for D-Amp and SRS.• Prepared schedule for project launch• Financial<ul style="list-style-type: none">o Prepared cost reports and reviewed monthly expenses.o Finalized projections and entered them into the cost reporting system• Procurement<ul style="list-style-type: none">o Held conference with potential vendors for kitting. Received and evaluated proposals from vendors. Selected final vendor and provided documentation on selection to UM Procurement.o Began procurement of supplies for Spring launch and kitting.• Technical systems		

- o Continued evaluation of questionnaire changes, updating Blaise specifications for programmers.
- o Conducted final revisions to the combined screener specification, met with programmers and submitted specification for programming.
- o Finalized consent sequence for main questionnaire. Presented design to LCD team.
- Training preparation
- o Met with production managers to discuss training plans. Reviewed and revised study-specific training agenda.

Task 2: Sampling

- Reviewed final screener specification, provided feedback.
- Began reviewing potential dashboard designs.
- Worked with UMTRI to obtain MDOS sample.

Task 3: Questionnaire Development

- See Task 1 for activities completed by the management team

Task 4: CAI Programming

- Began programming combined screener.

Task 5: Systems Programming

- Began updating D-Amp sample management system.

Tasks 6, 7: Interviewer Recruitment & Hiring, Training

- Facilities
 - o Finalized contract for May 2023 training space
 - o Finalized RFP for July training space. Contacted potential sites to assess availability.
- Interviewer recruitment
 - o Reached out to on-staffers who worked on D-Amp in 2019.
 - o Evaluated applications for team leader, production coordinator
 - o Finalized postings for new hire interviewers, submitted to HR for approval
 - o Finalized flyers for new-hire postings
 - o Posted open positions in a variety of locations, began screening applicants

Task 8: Main Data Collection

- See Task 1 for procurement activities

Task 9: Post Collection Processing

- No activity this month

Task 10: Weighting

- No activity this month

Task 11: Final Data Deliverables

- No activity this month

Special Issues

--Interviewer recruitment is not going well. We are working on a design for a bonus program for new hires. We are also asking the LCD team to help spread the word about open interviewer positions.
--The project is well behind schedule on technical development due to understaffing. The project is currently understaffed, and the timeline for launch is *very* short. We are continuing to work to add staff to the project to assist in various ways.
--The Pls have not processed a number of IRB changes that were requested last year. This may impact printing, kitting and study preparation, leading to more staffing needed at SRO so the project can launch on time.
--The Pls indicated that there would be a number of questionnaire changes, which were not anticipated in the budget.

Cost as of Mar 17, 2023	Total Cost to Date (direct + indirect):		1,057,069.89
	Est Cost at Completion (E\$AC):		3,757,998.03
	Total Budget:		3,758,127.00
	Variance (Total Budget minus- E\$AC):		128.97
	Reason for Variance:		The projected variance is insignificant.
Projections as of Mar 17, 2023	Dollars Projected for Month:		47,071.76
	Actual Dollars Used:		30,033.16
	Variance (Projected minus Actual):		17,038.60
	Reason for Variance:		The project is understaffed. We are working to both add staff to the project, and also to adjust projections.

Measures	Units at Complete	RR	HPI
Current Goal:	930	varies	11.65 w/screen, inf
Goal at Completion:	930		
Current Actual:			
Estimate at Complete:	930		
Variance:			

Other Measures

.75 hour per completed screener (.45 hour per sample line). 60% cooperation rate with screening

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: 02/21/2021SS Train Start: 02/23/2022SS Train End: 03/03/2022DC Start: 03/07/2022DC End: 07/29/2024</div>		
Other Project Team Members	<div>Derek Dubuque (Production Manager), Andrea Sims (Production Manager), Theresa Camello (Production Manager), Tagh Reid 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)</div> <div>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</div> <div>Coding Lead: Carolyn Vieira-Martinez</div>		
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	Feb, 2023 (HRS 2022 Panel & Baselines)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Throughout the month of February, - The project team has been working on production monitoring, logging, weekly mailings (SSA and SAQ), payment and letter request processing.		

- Minimal technical updates made to SurveyTrak, Weblog, WebTrak, MSMS, and reports.
- Limited effort protocol continues with minimal impact to the field staff (504 SIDs pulled from field as of 3/16/23).
- Recruitment for April training (4/19 to 4/25) continued (wrapping up in early March). 130 trainees (126 new hires and 4 on-staffers) are scheduled to attend.
- Web panel CATI follow up in process. A new issue was identified for cases started via Web suspended in Section A and resumed via CATI due to Blaise session. Short term fix implemented for 2022. SRO is coordinating a meeting with CBS to discuss long term solutions.
- Priority/Increased token flagging of Panel and EgenX 2019 sample and non-priority Panel eFTF mode switch protocols were implemented. Interviewer effort and completion rates increased on the high priority cases.

*As of 3/16/23, the "measures" table reflects both Panel and Baseline interviews combined.

Special Issues	<ul style="list-style-type: none"> - Concerns about meeting Panel interviewing goals even with the additional three months of field time due to current interviewer count and balancing effort with new cohort screening/baseline lws. Project team is working with client on responsive design options to implement to help alleviate this concern. - Multiple Blaise issues that have impacted STrak and MSMS throughout data collection.
-----------------------	---

Cost as of Mar 16, 2023	Total Cost to Date (direct + indirect):	13,700,353.25
	Est Cost at Completion (E\$AC):	19,298,497.98
	Total Budget:	19,016,630.00
	Variance (Total Budget minus- E\$AC):	-281,867.98

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 interview goals have been applied to CRS.

Projections as of Mar 16, 2023	Dollars Projected for Month:	786,946.66
	Actual Dollars Used:	682,831.98
	Variance (Projected minus Actual):	104,114.68

Reason for Variance: February salary costs were below projections by 3%. Non-salary costs were significantly under projections due to unused costs for travel, respondent payments, and advertising. The unused costs were pushed forward to future months.

Measures		Units at Complete	RR	HPI
	Current Goal:	12,841	50%	8.5
	Goal at Completion:	22,661	62%	8.2
	Current Actual:	12,912	50.4%	9.5
	Estimate at Complete:	22,661	62%	11.7
	Variance:	0	0	3.5

Other Measures	Panel: Goal RR: 74%, Current RR: 55.8% 2022 Baselines generated from screener: Goal RR: 44%, Current RR: 18.1% 2019 EGenX baselines: Goal RR: 70%, Current RR: 58.2%
-----------------------	--

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: Carolyn Vieira-Martinez		
	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 a crosswalk between the 1980 and 2010 occupation census codes as well ass 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 - 06/2024		
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	Feb, 2023 (HRS HOC)	Planning	
Risk Level	On Track		
Monthly Updates	During the month of February, - Jeannie participated in meetings with the PI and budget analyst. -Coordinated meetings and communication between HRS and PIs to keep progress moving forward in order to have coding activities begin late spring 2023.		
Special Issues	- Delay of original coding work scope to now begin in late Spring 2023 - PI with the most coding experience/knowledge left the organization shortly after start of project - SRO's staff member with the most HRS coding experience/knowledge informed project team in mid-January that he will be retiring the first week of February allowing for a very short transition of knowledge to the newly assigned coding lead.		
Cost as of Mar 16, 2023	Total Cost to Date (direct + indirect):	16,638.43	
	Est Cost at Completion (E\$AC):	85,429.09	
	Total Budget:	92,157.06	
	Variance (Total Budget minus- E\$AC):	6,727.97	
	Reason for Variance:	Variance is due salary as a result of moving Stan Hasper's hours to Carolyn Vieira-Martinez.	

Projections as of Mar 16, 2023		Dollars Projected for Month:		2,393.95
		Actual Dollars Used:		3,132.49
		Variance (Projected minus Actual):		-738.54
		Reason for Variance:		Staff hour projections were on target; the variance was due to fringe benefits.
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: Theresa Camelo		
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	Feb, 2023 (HRS2022-Screening)		Implementing
Risk Level	Some Concerns		
Monthly Updates	<p>A portion of Batch 4 sample has been released to the field and continues to be released on a flow basis as previous sample is worked. We've discussed with the PIs the possibility of the Batch 4 sample remaining on web (primarily due to no coverage in the field) to be sent to the SSL for calling. No decision has been made yet. A discussion has begun with the PIs about end game strategy for the first three sample batches. We have drafted a proposal that we are working on finalizing.</p> <p>The new training group has begun screening. They largely have been doing well. Despite being lower on screening hours overall, we have been hitting our production goals recently. SSL staff have also begun calling the Batch 2 and 3 cases flagged for phone follow-up. We have also provided them with Batch 1 cases that need calling (Batch 1 was not part of the follow-up protocol design).</p> <p>A larger training of at least 120-140 is planned for April. The SRO and sampling team are working though how much effort is needed to meet the targets of the study.</p>		

We have had discussions with the PIs about how many baseline interviewers we need to have done by the end of calendar year 2023. The goal is to have 50% (or more) of the EGENX goal (4,500-5,200), and most/all of the MOC goal (2,000).

Special Issues

Cost as of Mar 14, 2023	Total Cost to Date (direct + indirect):	8,966,278.40
	Est Cost at Completion (E\$AC):	29,274,035.66
	Total Budget:	28,919,242.00
	Variance (Total Budget minus- E\$AC):	354,793.66
	Reason for Variance:	Project staff is aware of the current projected overrun. Added projections for increased number of new hires for the April training (100 ->130), increased the number of days (6->8), and added additional time for DCS training group for the April training.
Projections as of Mar 14, 2023	Dollars Projected for Month:	838,368.66
	Actual Dollars Used:	610,870.50
	Variance (Projected minus Actual):	227,498.16
	Reason for Variance:	The largest contributors to the variance were spending less in recruitment advertising, unused respondent payments, overall hours (~2,000) and less travel. Most of those costs were pushed forward.

Measures		Units at Complete	RR	HPI
	Current Goal:	3,600/1,500 HHs	73%	3.0
	Goal at Completion:			
	Current Actual:	1,223/1,223	26.5%	4.52
	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	Feb, 2023 (IHDS3)		Implementing

Risk Level	Some Concerns			
Monthly Updates	<p>February was a busy month</p> <p>Prepared Training project for A06. Got Clients to agree on no longer supporting two versions of each data model as they had to make the same changes to both data models delaying the release. The big focus in February was releasing the Migrant Project and addressing any issues that arose.</p>			
Special Issues				
Cost as of Mar 16, 2023	Total Cost to Date (direct + indirect):	547,007.74		
	Est Cost at Completion (E\$AC):	576,232.24		
	Total Budget:	559,884.53		
	Variance (Total Budget minus- E\$AC):	-16,347.71		
	Reason for Variance:	Our overrun has decreased by \$1K, we hope to continue this trend as we keep passing as much work to the client as possible.		
Projections as of Mar 16, 2023	Dollars Projected for Month:	13,693.93		
	Actual Dollars Used:	12,661.88		
	Variance (Projected minus Actual):	1,032.05		
	Reason for Variance:	Happy to not have used as many hours. We keep same estimates for unforeseen issues.		
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	Feb, 2023 (MI CReSS (Year 3))		Implementing
Risk Level	On Track		
Monthly Updates	Sample replicate 13 was released as planned. Got PI approval to offer an increase of monetary incentive for Release 9 that was lagging behind. Worked with		

Production Manager to develop additional report to view call windows per SID to help manage calling cases.
Funding for 2 was approved and added to the budget. Requested final batch of lwer incentives for this follow on.

Special Issues		
Cost as of Mar 16, 2023	Total Cost to Date (direct + indirect):	206,895.80
	Est Cost at Completion (E\$AC):	376,620.23
	Total Budget:	390,364.00
	Variance (Total Budget minus- E\$AC):	13,743.77
	Reason for Variance:	New funding was just added and still need to work with financial analyst to balance out the hours.

Projections as of Mar 16, 2023	Dollars Projected for Month:	44,961.31
	Actual Dollars Used:	31,505.95
	Variance (Projected minus Actual):	13,455.36
	Reason for Variance:	Not all payments to Respondents were processed on this month, so this cost will be moved forward and reflected in next accounting period.

Measures		Units at Complete	RR	HPI
	Current Goal:	4,034 (Rel 1-13)	80% (60%-Web/40%Tel)	2.25
	Goal at Completion:		80% (60%-Web/40%Tel)	
	Current Actual:	3,109	73% (67%-Web/33% Tel)	4.74
	Estimate at Complete:			
	Variance:			

Other Measures

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	Richard Miech (SRC)		
Investigator/Clients			
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> <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	Hueichun Peng Technical Lead (WebSMS programmer) Brad Goodwin (+Ed Green) Data Management Ashwin Dey SurveyTrak, WebTrak and MTF specific Apps. Programmer Deborah Wilson and Brendon Carroll 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	Feb, 2023 (MTF Base Year 2022_27)		Implementing
Risk Level	On Track		
Monthly Updates	February 2023 - Production for 2023 base year began on 2/13. To date (3/17) the survey has been administered in 73 schools, across all these schools, 7,748 students have completed the survey - RR 86%. Interviewers visited 67 of these 73		

schools to proctor in person, the remaining 6 were coordinated by the interviewer without visiting the school.

- The number of recruited schools passed to SRO interviewers conduct the survey administration protocol is lower than in previous years (256 compared to 349 in 2022 - in 2019 the number of schools was closer to 400). Recruiters are finding it much more difficult to recruit and then complete all the administrative steps they need to before the school is passed to interviewers. Interviewers are being asked to make FTF visits (and other contact attempts) to help gather the details they need to. Both the callers and interviewers are also making FTF visits to schools in order to recruit the schools (the process that begins during the later summer in the previous year) - these are schools who have not responded to initial letters asking for their participation.

Special Issues

Cost as of Mar 07, 2023	Total Cost to Date (direct + indirect):	972,283.58
	Est Cost at Completion (E\$AC):	8,621,777.44
	Total Budget:	9,778,060.00
	Variance (Total Budget minus- E\$AC):	1,156,282.56
	Reason for Variance:	<p>Current projections result in an underspend of \$1,156,282.56 for the five year grant period.</p> <p>A client report (with notes) is provided to Nicholas Prieur every month so the MTF research staff are aware of projected cost to complete.</p> <p>Also described below - the number of schools recruited that could potentially be passed to SRO is ~240 - much lower than previous year (~390). Pressure on schools are even greater, they are still dealing with staffing challenges but in addition pressure for parents to influence school activities is also more prevalent this year.</p> <p>Not changed since last month (January) - left for info.</p> <p>Projections for the five year period are based on current scope of work and the adapted protocol (introduced in 2021). The budget prepared for the proposal was based on the pre-pandemic design. The adapted protocol brings savings in the following categories: interviewer hours, travel, shipping and staff time (specifically hours required for loading and preparing tablets for shipping). For the past few years the number of schools recruited and passed to SRO has been lower than the number on which the budget is based (n=390), we have continued to base projections on achieving survey administrations in 390 schools. Wave 1 (2023)</p> <p>- We have increased staff time (marginally) to prepare for the small pilot (six schools) to test methods to increase cooperation from 12th grade students to provide contact details.</p> <p>We may also add some hours and expenses for FTF school recruitment trips that SRO has been asked to help with (given the lower response than is usual at this point, it is hoped that FTF visits may boost recruitment).</p>

Projections as of Mar 07, 2023	Dollars Projected for Month:	211,118.06
	Actual Dollars Used:	68,678.30
	Variance (Projected minus Actual):	142,439.76
	Reason for Variance:	<p>Variance - The majority of the variance is from non-salary costs. We received a credit of \$36,000 from Property Dispo. for the ~6,600 tablets we sent late last year. The projections for travel were much higher than actual costs. I have revised the projections for travel - based on the lower number of schools and the number now scheduled for each month.</p>

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	<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	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	Feb, 2023 (MTF Panel 2022-27)		Implementing
Risk Level	On Track		
Monthly Updates	<div>1. Management<ul style="list-style-type: none">- Surveys are ready for test and production in Illume- MTF staff is preparing the testing buglog for integrating testing- Working with MTF staff to prepare the 2023 data collection</div> <div>2. System<ul style="list-style-type: none">- Putting final touches on the refinement of the RLM system.- Transitioning and training a new DM- Lab SMS testing application has been set up.- Continue to work on Web SMS for 2023 production- Working with MTF staff to update email templates- Created new password and PIN for current wave respondents</div> <div>3. Data Collection - N/A</div>		

Special Issues

Cost as of Feb 28, 2023	Total Cost to Date (direct + indirect):		681,823.36
	Est Cost at Completion (E\$AC):		3,852,911.50
	Total Budget:		3,895,217.00
	Variance (Total Budget minus- E\$AC):		42,305.50
	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 Feb 28, 2023	Dollars Projected for Month:		44,299.62
	Actual Dollars Used:		43,770.62
	Variance (Projected minus Actual):		529.00
	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 Iavorska-Em Production Manager: Senior Project Advisor: Stephanie A Chardoul Production Manager 1: Camila Kendall Production Manager 2:		
Proposal #	no data		
Description	<p>SRO will work with the PIs and a local survey firm in Puerto Rico, Estudios Técnicos (ETI), to develop a sample frame, sample design, questionnaire and data collection protocols for both pilot data collection (in 2022) and baseline data collection (in 2023). DMSS will provide assistance with sample design and implementation, responsive design, panel maintenance issues, and creation of sample weights. SRO will update the PSID-21 Spanish instrument for use specifically in PR. SRO will assist with the preparation of training materials for Listing training, Pretest and Main Data collection and will travel to PR to be on-site for these trainings. SRO will define reports for production and quality control monitoring that will be programmed through the SurveyTrak system, and train the research team on using these reports. All data will be collected by ETI's interviewers in PR and will be encrypted and transmitted daily via SurveyTrak to a secure SRC server. SRO will also assist with data processing.</p>		
SRO Project Period	01/2022 - 12/2023		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 10/01/2021 Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 12/31/2023 </div> </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	Feb, 2023 (PR-PSID)		Implementing
Risk Level	Some Concerns		
Monthly Updates	<p>Listing: --Listing effort will extend through at least mid-March --SRO and PR coordinating on blocks with limited access and QC corrections.</p> <p>Main Data Collection: Main Project kick off held on February 21. SRO completed initial review of RSS's (translation company) comments for improvements to the Core instrument. SRO suggested that PIs incorporate the feedback from RSS. PIs coordinated procurement process with second choice translation firm. Agreement finalized on 3/11. Interviewed two candidates for temp research assistant position to help with Spanish testing. Both candidates were hired, and began working on 3/16. As of 3/17, the procurement contract with ETI has not yet been finalized.</p>		

Special Issues	Concerns about pretest timeline (planned for June 2023) -- coordination with ETI and translation firm has not yet begun.			
Cost as of Mar 16, 2023	Total Cost to Date (direct + indirect):	230,623.84		
	Est Cost at Completion (E\$AC):	1,291,864.37		
	Total Budget:	1,292,585.00		
	Variance (Total Budget minus- E\$AC):	720.63		
	Reason for Variance:	Final direct cost underrun decreased by ~\$800. The main driver of the cost increase is small increases in projections of certain staff hours, and the associated fringe benefits.		
Projections as of Mar 16, 2023	Dollars Projected for Month:	34,153.04		
	Actual Dollars Used:	21,789.83		
	Variance (Projected minus Actual):	12,363.21		
	Reason for Variance:	Monthly underrun mainly due to underrun in tech categories as MDC programming has not yet begun.		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(PSID CDS 2023) PSID Childhood Development Supplement 2023		
Project Mode	Primary: Mixed	Secondary: Face to Face	Total of Modes: 4
Project Type	Sponsored Projects		
Budget	Direct Budget: 0.10	Indirect Budget: 0.10	Total Budget: 0.20
Principal	Narayan Sastry (SRC)		
Investigator/Clients			
Funding Agency			
IRB	HUM#: HUM00166316	Period of Approval:	
Project Team	Project Lead: Piotr Dworak		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager: Sarah Crane		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	A 2023 wave of the Childhood Development Supplement (CDS) is going to be conducted in two phases. Phase 1: from September 2023 – May 2024 and Phase 2: from June 2024 - January 2025. The sample for CDS is comprised of the PSID-eligible children (ages 0 -17) from the Core 2023 families we interview and their primary caregivers. Approximately 3,700 families will be included, with some Core families containing several CDS children. As part of the CDS Phase 1, families are asked to complete phone coverscreen and PCG interviews followed by mixed Adolescent 12 - 17 phone/web interview (including an IVR component in phone mode). In Phase 2 families will be visited in person (where possible) and asked to complete Child 8 - 11 interviews (via Video if out of area), provide physical measurements, educational assessments, saliva collection, time diaries, school and birth record linkage forms. CDS interviewing will be conducted by a mix of SSL and Field interviewers. Coverscreen and PCG interviews will be handled by SurveyTrak and Blaise 4.8, Adolescent interviews will be handled by MSMS and Blaise 5.		
SRO Project Period	08/2022 - 01/2025		
Data Col Period	09/2023 - 01/2025		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 10/01/2022</div><div>Pretest End: 05/14/2023</div><div>Staffing Complete: 08/01/2023</div><div>SS Train Start: 09/07/2023</div><div>DC Start: 09/14/2023</div></div> <div><div>Pretest Start: 04/24/2023</div><div>Recruitment Start: 07/01/2023</div><div>GIT Start: 09/05/2023</div><div>SS Train End: 09/12/2023</div><div>DC End: 01/01/2025</div></div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	SurveyTrak; MSMS; Other (WSMS)		
Data Col Tool	Blaise 4.8; Blaise 5; Other (IVR)		
Hardware	Laptop; Desktop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Time Diary Coding)		
QC Recording Tool	DRI-CARI; Camtasia		
Incentive	Yes, R; Yes, INF; Yes, Other (PCG)		
Administration	SRO Group		
Payment Type	Check, post (75 + interventions); Other (ePay)		
Payment Method	Check through other system (PSID RAPS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (PSID RAPS)		

Report Period	Feb, 2023 (PSID CDS 2023)		Initiation
Risk Level	On Track		
Monthly Updates	<p>CDS 2023 has not yet received the 2023 - 2025 funding from NIHCD, however, Pls found \$178K to cover some of the cost accrued under the contingency account.</p> <p>Pls asked us to continue development and preparations for the pretest, training for which is now scheduled for June 12 - 15 following PSID Core Training 2. Technical development is ongoing, however, the exact scope of the pretest is being determined on 3/23.</p> <p>Funding contingencies may also determine our production launch. If the project is funded in March, we could launch Phase 1 data collection in October 2023.</p> <p>Phase 1 of CDS data collection includes remote administration of phone coverscreen, and a primary care-giver interview followed by a web-phone interviews with adolescents 12-17. Phase 1 will also include a transfer from</p>		

CATI to IVR to ask sensitive questions. PAPI Time Diaries are not yet a part of Phase 1, however, we plan a series of discussion on whether or not they should be included in some scope.

Correspondingly, Phase 1 pretest will include the remote administration of instruments (CS, PCG, Child 12 - 17). If possible, we would also like to pretest conducting Phase 2 Video interviews with Children 8 - 11.

Phase 2 of CDS data collection will include home visits with Saliva, Woodcock-Johnson, Time Diaries, and younger child (8-11) interviews.

Current activities:

Blaise programming:

- B5 Child programmed and being tested
- B4.8 PCG programmed and being tested
- B4.8 CS programmed and being tested
- B4.8 recruitment, Preload builder instrument is programmed and ready

SurveyTrak programming:

- Integration Pretest project is being tested
- ST + B5 project for younger children has been also programmed and may be included in the pretest

MSMS Programming:

- Bare-bones project has been released and is being tested
- Copy procedure for Child lines from ST to MSMS has been implemented and is being refined
- We are awaiting specs for MSMS Pretest project on 3/24 and the goal to have the Pretest INT project by mid-April.

New IVR system: Enghouse / Survox sole source is awaiting procurement approval.

Special Issues

Budget: Contingency budget has been established through October '22 but as of February, we don't have a clear expectation for when the funding will be awarded. SRO is communicating regularly with the PI and the SRC Director's office to monitor the contingency account. PIs are able to cover \$178K.

Tech systems: CDS development is ceding programming time to allow some programmers to focus on PSID-Core launch. This led to some delays on the MSMS side of our development.

Cost as of	Total Cost to Date (direct + indirect):	0.00
	Est Cost at Completion (E\$AC):	0.00
	Total Budget:	0.20
	Variance (Total Budget minus- E\$AC):	0.00
	Reason for Variance:	CDS is under contingency funding awaiting funding decision from NIH. We spent \$244K direct through February.
Projections as of	Dollars Projected for Month:	0.00
	Actual Dollars Used:	0.00
	Variance (Projected minus Actual):	0.00
	Reason for Variance:	In February, we projected spending \$60K but spent \$49K.

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

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: Ivanna Iavorska-Em 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> 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>		
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	Feb, 2023 (PSID23 Online Contact Update)		Closing
Risk Level	On Track		
Monthly Updates	Project ended on December 15. PSID and SRO met for debriefing -- discussed lessons learned and important considerations for the next wave.		
Special Issues			
Cost as of Mar 08, 2023	Total Cost to Date (direct + indirect):		45,946.49
	Est Cost at Completion (E\$AC):		46,919.51
	Total Budget:		47,456.00

Variance (Total Budget minus- E\$AC):		536.49		
Reason for Variance:		Minimal change. No projections until project archiving in May.		
Projections as of Mar 08, 2023	Dollars Projected for Month:	182.17		
	Actual Dollars Used:	205.11		
	Variance (Projected minus Actual):	-22.94		
Reason for Variance:		Monthly overrun due to fringe rate fluctuation.		
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	03/2023 - 02/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 03/01/2022 Pretest End: 10/31/2022 Staffing Complete: SS Train Start: 03/08/2023 DC Start: 03/16/2023 </div> <div> Pretest Start: 10/11/2022 Recruitment Start: 09/19/2022 GIT Start: 06/05/2023 SS Train End: 06/11/2023 DC End: 02/28/2024 </div> </div>		
Other Project Team Members	TSG Tech Leads - Jim Rodgers, Jeff Smith, & Karl Dinkelmann; Data Manager - Brad Goodwin; 68ID Site Programmer - Ashwin Dey; Blaise Programmer - Jude Perillo; MSMS Programmers - Pam Swanson & Darnell Christian; Self Scheduler Programmer - Peter Sparks; Help Desk Support - Andrea Pierce; Production Tech Support - Sarah Elisa Broumand; Testing Coordinator - Camila Kendall; Project/Production Support - Mark Nathin, Janet McBride, & Xiomara Lorenzo-Guerra; Reporting, Mapping, & Sample Assignment - Ji Qi & Wen Chang		
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	Feb, 2023 (PSID23)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Summary of February 2023 Activities	
	<p>Blaise:</p> <p>PSID completed Prod Data Test instrument testing on 2/7, but they identified Blaise showstoppers for data model 1 (DM1). SRO programmed the fixes. Additionally, there was one case (CATI to Web mode switch) with missing field properties (FPS) data (for the Web). SRO needed to modify and test 1) the Device Instrument Manager (DIM) to ensure it was only writing records to the central Blaise server when the record had been modified offline and 2) the Write Interceptor to ensure the merge logic was working as expected.</p> <p>On 2/17, PSID signed off on DM1 in CTT. They began integration testing in INT2 on 2/20 and identified an instrument and preload issue related to a field preloaded as a string variable but needed to be an integer. SRO notified the PIs of the situation and outlined what steps were needed to correct the issue and test it. In that email communication, SRO informed the PIs of a delayed launch date (targeting 3/23 instead of 3/16).</p> <p>SRO updated the instrument, and PSID delivered new preload. PSID tested the updated DM1 in CTT and signed off on 2/27. SRO began preparation for a second Prod Data Test.</p> <p>Additionally, the coverscreen reset process was modified. Spanish CATI programming continued. Additional CATI specs were provided with the web specs on 2/14. SRO reviewed and advised on the translation company's CATI recommendations.</p> <p>MSMS:</p> <p>Increased testing effort with training sign off on 2/13. Spent more time than anticipated programming and testing email and text templates that incorporated MSMS Core NAPE improvements. The new testing/fixing/retesting process created inefficiencies. Concerns were raised about the total email sync time (4-5 mins/email); the process was faster in Pretest. Changes were made to the Core DCA to remove Blaise syncs during the email process, and sync times improved. Interview verification within the same MSMS project was set up and tested.</p> <p>Other Tech:</p> <p>Efforts were made to streamline PQT for TL and management use. Report development continued. Continued work on Team Locating within the 68ID Site. Awaited updated self scheduler for testing.</p> <p>Management:</p> <p>Submitted IRB amendment with changes for 2023 wave on 2/24.</p> <p>Training and Staffing:</p> <p>Continued training material development and planning new hire recruitment. Shifted Training 1A dates to start on 3/8 (instead of 3/6) due to delayed launch. Finalized field leadership staffing. Hired an additional PSID21-experienced TL for T1. At T2, will transition two T1 interviewers to TLs. End of the vaccine mandate allowed us to collapse our Phone Only and FTF projects and some of the Phone Only iwers may be willing to do FTF. End of the mandate will also help with New Hire recruitment.</p> <p>Saliva:</p> <p>Met w/ PIs on 2/6 to propose material and mailing plans--suggesting ways to improve CDS19 processes. Tested saliva line creation and MSMS rules. SRO sent memo to PIs on 2/14 recommending that interview and saliva funds be set up as one a multi-funder project, with costs allocated systematically by SRO-FSG. Working w/ PIs to finalize the rebudget -- needed reduce cost to met funding cut (PI notified SRO on 2/14). Posted SSL SurveyTech positions on 2/17 -- aiming to hire 4. Met w/ PIs on 2/24 to confirm PSID, SRO, and BSL responsibilities.</p>	
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 Mar 17, 2023	Total Cost to Date (direct + indirect):	743,750.46
	Est Cost at Completion (E\$AC):	5,215,536.77
	Total Budget:	5,030,748.00
	Variance (Total Budget minus- E\$AC):	-184,788.77
	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 program hours; merit increase above 3%; and recruiting/hiring/training more interviewers (including more new hires) than budgeted. PIs are aware of the projected overrun. We are working with them to design strategies to make data collection more efficient. Note: Unable to separate Core IDC costs from Contact Update IDC costs. Cost values only reflect Direct Costs.
Projections as of Mar 17, 2023	Dollars Projected for Month:	245,445.97
	Actual Dollars Used:	187,851.01
	Variance (Projected minus Actual):	57,594.96
	Reason for Variance:	Technical development and management work was across the interview and saliva efforts, so some costs projected under the interview budget hit the saliva budget (~\$8K direct). Project, production, and data managers charged less time than projected due to availability. With a later new hire training, recruitment work has been delayed. With later training dates, DCS support has shifted later. Training material development was behind schedule, so non-salary duplicating and shipping costs have not hit yet. Note: Unable to separate Core IDC costs from Contact Update IDC

costs. Cost values only reflect Direct Costs.

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	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	(QoL & Hearing Loss) Quality-of-Life for Amish Children with Hearing Loss		
Project Mode	Primary: Cognitive IW Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 8,200.00	Indirect Budget: 0.00	Total Budget: 8,200.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Margaret Lee Hudson		
	Budget Analyst:		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1: Lisa Van Havermaet		
	Production Manager 2:		
Proposal #	no data		
Description	Cognitive interviews to develop a QoL instrument for Amish children with hearing loss		
SRO Project Period	02/2022 - 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	Amish study		
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Not used		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Feb, 2023 (QoL & Hearing Loss)		Implementing
Risk Level	On Track		
Monthly Updates	In February, the SRO team (Lisa V-H and Margaret) developed a cognitive interview guide based on the questionnaire we developed and shared with the Michigan Medicine (MM) team. Margaret worked with the MM to plan for conducting cognitive interviews as part of the quarterly community audiology clinic to beheld March 1, 2023. Our plan will be to conduct the IWs with parents who bring their school aged children (aged 7-14) to the clinic on that day. Both Lisa and Margaret will attend the clinic to be able to conduct IWs.		
Special Issues			
Cost as of	Total Cost to Date (direct + indirect):	0.00	
	Est Cost at Completion (E\$AC):	0.00	
	Total Budget:	8,200.00	
	Variance (Total Budget minus- E\$AC):	0.00	
	Reason for Variance:		
Projections as of	Dollars Projected for Month:	0.00	
	Actual Dollars Used:	0.00	
	Variance (Projected minus Actual):	0.00	
	Reason for Variance:		

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

Other Measures

Project Name	(SRS 2021) Social Relations 2023		
Project Mode	Primary: Face to Face Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 3,767,057.11	Indirect Budget: 2,109,553.00	Total Budget: 5,876,610.11
Principal	Toni Antonucci (ISR)		
Investigator/Clients	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: Tagh Reid 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 original Social Relations panel 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	<div> <div> Pre Production Start: 09/01/2022 Pretest End: Staffing Complete: 04/10/2023 SS Train Start: 05/18/2023 DC Start: 05/30/2023 </div> <div> Pretest Start: Recruitment Start: 02/01/2023 GIT Start: 05/16/2023 SS Train End: 05/25/2023 DC End: 04/30/2023 </div> </div>		
Other Project Team Members	Tagh Reid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall		
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 (\$75 respondent, \$25 informant); Other (\$2 screener incentive)		
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)		

Report Period	Feb, 2023 (SRS 2021)		Implementing
Risk Level	Attention!		
Monthly Updates	<p>During February 2023, SRC activities on the DAWN projects included the following:</p> <p>Task 1: Management, Budget and Work Plan</p> <ul style="list-style-type: none"> • Held meetings with the DAWN research team to discuss study planning, budget, scope and schedule for D-Amp and SRS. • Prepared schedule for project launch • Financial <ul style="list-style-type: none"> o Prepared cost reports and reviewed monthly expenses. o Finalized projections and entered them into the cost reporting system • Procurement <ul style="list-style-type: none"> o Held conference with potential vendors for kitting. Received and evaluated proposals from vendors. Selected final vendor and provided documentation on selection to UM Procurement. o Began procurement of supplies for Spring launch and kitting. 		

- Technical systems
 - o Continued evaluation of questionnaire changes, updating Blaise specifications for programmers.
 - o Conducted final revisions to the combined screener specification, met with programmers and submitted specification for programming.
 - o Finalized consent sequence for main questionnaire. Presented design to LCD team.
- Training preparation
 - o Met with production managers to discuss training plans. Reviewed and revised study-specific training agenda.

Task 2: Sampling

- Reviewed final screener specification, provided feedback.
- Began reviewing potential dashboard designs.
- Worked with UMTRI to obtain MDOS sample.

Task 3: Questionnaire Development

- See Task 1 for activities completed by the management team

Task 4: CAI Programming

- Began programming combined screener.

Task 5: Systems Programming

- Began updating D-Amp sample management system.

Tasks 6, 7: Interviewer Recruitment & Hiring, Training

- Facilities
 - o Finalized contract for May 2023 training space
 - o Finalized RFP for July training space. Contacted potential sites to assess availability.
- Interviewer recruitment
 - o Reached out to on-staffers who worked on D-Amp in 2019.
 - o Evaluated applications for team leader, production coordinator
 - o Finalized postings for new hire interviewers, submitted to HR for approval
 - o Finalized flyers for new-hire postings
 - o Posted open positions in a variety of locations, began screening applicants

Task 8: Main Data Collection

- See Task 1 for procurement activities

Task 9: Post Collection Processing

- No activity this month

Task 10: Weighting

- No activity this month

Task 11: Final Data Deliverables

- No activity this month

Special Issues

--Interviewer recruitment for bilingual Arabic speakers is not going well; recruitment for English speakers is low. We are working on a design for a bonus program for new hires. We are also asking the LCD team to help spread the word about open interviewer positions.

--The project is well behind schedule on technical development due to understaffing. The project is currently understaffed, and the timeline for launch is *very* short. We are continuing to work to add staff to the project to assist in various ways.

--The Pls have not processed a number of IRB changes that were requested last year. This may impact printing, kitting and study preparation, leading to more staffing needed at SRO so the project can launch on time.

--The Pls indicated that there would be a number of questionnaire changes, which were not anticipated in the budget.

Cost as of Mar 17, 2023	Total Cost to Date (direct + indirect):	97,433.59
	Est Cost at Completion (E\$AC):	5,874,982.37
	Total Budget:	5,876,610.11
	Variance (Total Budget minus- E\$AC):	1,627.74
	Reason for Variance:	The variance is insignificant.
Projections as of Mar 17, 2023	Dollars Projected for Month:	57,941.89
	Actual Dollars Used:	23,853.11
	Variance (Projected minus Actual):	34,088.78
	Reason for Variance:	The project is currently understaffed. We are working to add staff to the budget, and also to update projections.

Measures	Units at Complete	RR	HPI
Current Goal:	3644	varies	10.5
Goal at Completion:			
Current Actual:			
Estimate at Complete:			
Variance:			

Other Measures

80% screener cooperation rate on new sample, 65% panel sample response rate
8.5 budgeted hpi without screening for new sample and panel sample; new sample HPI budgeted at 10.5 with screening

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	11/2022 - 04/2024		
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	Ryan Yoder, Keith Liebetreu, Becky Loomis, Steven Sonoras, Andrew Piskorowski, Rose Zdybel, Ji Qi, Paul Burton, Makenna Harrison, Lamont Manley, Lisa Van Havermaet, Stephanie Windisch, Youhong Liu, Peter Sparks. Pam Swanson, Jim Rodgers, Marcus Blough, Nick Hinkle-DeGroot, Pete Westhead		
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	Feb, 2023 (STARRS-LS Waves 3 & 4) Implementing
Risk Level	On Track
Monthly Updates	<p>Project Management and Planning:</p> <ul style="list-style-type: none"> ? James attended the first quarterly SRAT meeting on February 22. ? We sent weekly production updates to the Pls, 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. ? Meredith created detailed budget line calculations for the Year 4 budget and sent them to USUHS on February 17. ? IRB: <ul style="list-style-type: none"> o The amendment for updates to the study brochure (VA and USUHS logos, 988, study email address) and miscellaneous administrative updates was approved by the U-M IRB on February 14 and by the USU IRB on February 23. ? We worked with M&RA to have the Army Graphics group add the IRB stamp to the new brochure. o We started work on the Continuing Review for the STARRS-LS Waves 3 and 4 protocol. The current expiration date is April 20, 2023. ? STARRS-affiliated, but not STARRS funded, work: <ul style="list-style-type: none"> o Firearms Study: We assisted the PI with a few questions about Veteran completion rates for the STARRS-LS Wave 2 and Wave 3 surveys. o VA/HEARTH project: <ul style="list-style-type: none"> ? We completed identification of Zip Codes for LS participants that separated from the Army between Wave 2 and Wave 3. On February 6, the file (n=544) of MasterIDs and Zip Codes, along with data security documentation, were posted to the Enclave. ? We learned that Harvard received their funding for this project. We took steps to see whether it will be possible to assign a manager and other resources for HEARTH sooner than anticipated (in the proposal materials, U-M SRO involvement was specified as starting June 2023). <p>Enclave and User Support:</p> <ul style="list-style-type: none"> ? Annual Security Controls Review: The Enclave Security Lead worked to produce follow-up materials and artifacts to be sent to AAG before the 2022 approval letter is issued. We awaited the controls list with notes from the call, and tools/instructions for configuration checks for enclave systems from AAG. ? Annual Security Training Renewal 2023: The completion date for the annual training was January 31. As of the end of February, there were two renewals outstanding, one of which was an authorized extension. Both analysts and their program managers are aware the training needs to be completed soon. ? The U-M team began making updates to the SSN-LinkageID list and confirmed a delivery date of March 10 to AAG will work for the research team. ? 2023 repeat NDI search: <ul style="list-style-type: none"> o Cost calculations for the 2023 repeat NDI search were sent to USUHS (for M&RA) on February 10. o Meredith started work to add our NDI application to the CDC NDI electronic system and learned that only the PI can request access to the application. She forwarded this information to USUHS and they made the request on behalf of Dr. Ursano. The website said the CDC will send further instructions for accessing the electronic application and we should allow up to one week for review of the request. ? 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 The Enclave team QCed and processed three high priority administrative construct files from Harvard (via AAG) and posted these to the Enclave on February 14. o We assisted a USUHS researcher with requests for information about SHOS-B open ended coding. o Enclave security staff worked with USUHS staff to track down issues related to delays in the fingerprinting/background check process. o The U-M SRC IT group fixed a network issue that prevented connections to the Enclave the morning of February 27. Access was restored by noon. o Work on additional requests related to the 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] for Dr. Ursano was on hold due to other deadlines. ? There were no biomarker group requests needing assistance in February. <p>Wave 3 Data Deliverable</p> <ul style="list-style-type: none"> ? U-M completed work on occupation/industry and open-ended response coding (including double coding of 7% of the entries). ? We completed work on the Wave 3 final outcomes dataset and sample flowcharts and delivered these to the Enclave on February 22. o We created four flowcharts in total: detailed/primary flowcharts with and without the 28 SHOS-A cases and simplified flowcharts (for M&RA/GSC) with and without the 28 SHOS-A cases. Versions without SHOS-A cases were provided because the cases will not be included in weighted LS panel analyses. <p>Public Use Data:</p> <ul style="list-style-type: none"> ? Biosample flags, administrative variables, and inventory document: <ul style="list-style-type: none"> o We awaited funding for this work (but U-M can start on the IRB submission in early 2023). ? 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 March 8, 2023, are as follows: <ul style="list-style-type: none"> o Replicates released: 4 of 14 released with 4,011 sample lines. o Completed interviews: 2,340 (2,213 web; 127 phone). o Replicate 2 ended production on February 24 with a final response rate of 73.6%. This raised the overall response rate for completed replicates to 72.0% (from 70.1%).

- o Replicate 3 moved into Phase 4 on March 4. The response rate is currently 65.7% and tracking higher than the Replicate 1 and 2 response rates at this same point in the protocol.
- o Replicate 4 was released on February 20. By March 8, it was in Phase 2 and respondents were receiving emails. The response rate is currently 32.3% and following the trend of Replicate 3.
- o The response rate for completed replicates (Reps 1-2) is 72.0%.
- o The Wave 4 survey crosswalk was delivered to Harvard on February 6. 2,828 Wave 4 data records (about 70% of which were completed surveys) were delivered to Harvard via the Enclave on February 17.

Safety Plan Results:

? The Wave 4 Safety Plan rate is 11.7% as of March 8.

Special Issues

Our areas of risk and mitigation strategies continue to be the same as reflected in previous months. Description of the following area was slightly updated this month:











? 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. The first two replicates in Wave 4 produced lower response rates. Replicate 3 has yielded higher response rates than Replicates 1 and 2, and Replicate 4 has followed the Replicate 3 trajectory to date. If the response rates for the next replicates of Wave 4 yield lower than expected response rates, we may propose considering whether to implement 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).

Cost as of Jan 31, 2023	Total Cost to Date (direct + indirect):	6,867,400.84
	Est Cost at Completion (E\$AC):	12,854,077.73
	Total Budget:	12,809,390.00
	Variance (Total Budget minus- E\$AC):	-44,687.73
	Reason for Variance:	We spent a total of \$298,147 in January. Our projected deficit for the total five-year project is slightly lower at \$44,688 (from \$69,298 in December). We will continue to review project expenses and update our projections based on realized costs and our experiences to date.
Projections as of Jan 31, 2023	Dollars Projected for Month:	313,622.02
	Actual Dollars Used:	298,147.22
	Variance (Projected minus Actual):	15,474.80
	Reason for Variance:	We underspent in a few task areas in January, in particular Enclave costs - two staff members charged fewer hours than expected, and Main Data Collection - fewer interviewer hours were charged than projected. The current Wave 4 MDC 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 are conservative, at least in terms of CATI administration times, so we are typically underrunning interviewer projections. After completing two or three Wave 4 replicates, we will have updated production statistics that can be used to update the Wave 4 projected hours/costs. These updates will be made in the next couple of months.

Measures		Units at Complete	RR	HPI
	Current Goal:	10,770	75	9
	Goal at Completion:	10,770	75	9
	Current Actual:	1,561	70.1 (Rep 1)	12
	Estimate at Complete:	10,340	72	9
	Variance:			

Other Measures

Developmental/Initiative Projects Dashboard

NonArchived Development Initiative and No-DataCol Projects					
Project	Type	Phase	Project Lead	Jan	Feb
<i>TSME SRO SYS MAINTENANCE- GENERAL(483910)</i>	Initiatives	Implementing	Jeffrey L Smith		
<i>TSME23 DCO Tech System Support FY2023</i>	Initiatives	Initiation	Vivienne Y Outlaw		
<i>TSME23-PIPPA</i>	Initiatives	Implementing	Mark Simonson		
<i>TSME23-QC-Systems (483249)</i>	Initiatives	Implementing	Sarah Elisa Broumand		
<i>TSME23-SelfSchedUI (483424)</i>	Initiatives	Implementing	Andrew L Hupp		

Project Name	(TSME SRO SYS MAINTENANCE-GENERAL(483910)) TSME SRO SYS MAINTENANCE-GENERAL(483910)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 20,000.00	Indirect Budget: 0.00	Total Budget: 20,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Jeffrey L Smith		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor: Gregg Peterson		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	This project will be used to support all maintenance/enhancements needs for applications or systems directly to the SurveyTrak production database which would include Surveytrak, ST Administration, SRS RT, and RCLS to name a few.		
SRO Project Period	07/2022 - 06/2023		
Data Col Period			
Security Plan	NA		
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 Pam Swanson Marsha Skoman Holly Ackerman Darnell Christian		
Other Project Name	Sys Maint General		
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	Feb, 2023 (TSME SRO SYS MAINTENANCE-GENERAL(483910))		Implementing
Risk Level	On Track		
Monthly Updates	Survey Trak Build team meetings New Builds changes released to field new R Profile loader Monthly setup of SCA in the SurveyTrak environment		
Special Issues			
Cost as of Mar 17, 2023	Total Cost to Date (direct + indirect):	27,439.18	
	Est Cost at Completion (E\$AC):	34,663.18	

Total Budget:		20,000.00		
Variance (Total Budget minus- E\$AC):		-14,663.19		
Reason for Variance:		See monthly updates		
Projections as of Mar 17, 2023	Dollars Projected for Month:	1,661.59		
	Actual Dollars Used:	2,349.77		
	Variance (Projected minus Actual):	-688.18		
	Reason for Variance:	See monthly updates		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(TSME23 DCO Tech System Support FY2023) TSME23-DCO Tech System Support (483248) 2023		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
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	Feb, 2023 (TSME23 DCO Tech System		Initiation
Risk Level	Some Concerns		
Monthly Updates	<ul style="list-style-type: none"> - Tested Fred-related modules on the Test server prepared for SQL Server Upgrade - Enhanced Closed Out report. Closed-out report can query a range of project assignment closing dates and output project assignment info, EMS status, Iwer Status info. - Added sorting features to "Recruit Contact Page" in the Admin Applicant Management Module. - Enhanced Inventory Sorting feature in Fred - Discussed PIPPA module in Fred - Added customized Generic Screener for SSL project in DCST - Removed COVID info from Fred UI and report 		
Special Issues			
Cost as of Mar 07, 2023	Total Cost to Date (direct + indirect):	46,712.28	
	Est Cost at Completion (E\$AC):	46,712.28	
	Total Budget:	35,000.00	
	Variance (Total Budget minus- E\$AC):	-11,712.28	
	Reason for Variance:	funding level not sufficient to support needed to maintain our systems - including the update to the SRC Iwer website	

Actual Dollars Used:

3,081.69

Variance (Projected minus Actual):

-3,081.69

Reason for Variance:

updates needed to DCSR, Mapping maintenance and FRED

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

Other Measures

x

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	Feb, 2023 (TSME23-PIPPA)		Implementing
Risk Level	On Track		
Monthly Updates	Most of the requested have been added. In testing mode.		
Special Issues			
Cost as of Mar 16, 2023	Total Cost to Date (direct + indirect):		14,638.34
	Est Cost at Completion (E\$AC):		15,639.10
	Total Budget:		10,000.00
	Variance (Total Budget minus- E\$AC):		-5,639.10
	Reason for Variance:		Catching up with work
Projections as of Mar 16, 2023	Dollars Projected for Month:		859.46
	Actual Dollars Used:		3,699.28
	Variance (Projected minus Actual):		-2,839.82
	Reason for Variance:		New features needed

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	Feb, 2023 (TSME23-QC-Systems)		Implementing
Risk Level	On Track		
Monthly Updates	Overall, OLIVE remains actively used and has remained stable for a few years now. February hours were used to 1. Troubleshoot some issues related to loading new users 2. Attend meetings related to QC solutions.		
Special Issues			
Cost as of Mar 16, 2023	Total Cost to Date (direct + indirect):		24,050.60
	Est Cost at Completion (E\$AC):		29,936.43
	Total Budget:		30,000.00
	Variance (Total Budget minus- E\$AC):		63.57
	Reason for Variance:		Small variance.
Projections as of Mar 16, 2023	Dollars Projected for Month:		2,156.96
	Actual Dollars Used:		2,577.60

Reason for Variance: Small variance.				
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(TSME23-SelfSchedUI (483424)) Self-Scheduling Interface for MSMS		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
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 - 04/2023		
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	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 Cheng Zhou - Manager parameter Ui and web API		
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	Feb, 2023 (TSME23-SelfSchedUI (483424))		Implementing
Risk Level	On Track		
Monthly Updates	Time spent during this period was primarily related to system testing and fixes. The system has been signed-off for operational use. We needed some assistance from CMT to allow Blaise (the scheduler) to get information from ODS. CMT is fine with how it's set-up, but most in SRO believe it should be a web API call rather than it's current configuration. I've spoken with Greg about this as it's likely to overrun the remaining budget if we do this work. We are waiting on an estimate to see what impact it has on the bottom line. Andrew had a project review to update the organization on the status of the project.		
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 Mar 09, 2023	Total Cost to Date (direct + indirect):			9,958.65
	Est Cost at Completion (E\$AC):			9,958.65
	Total Budget:			10,000.00
	Variance (Total Budget minus- E\$AC):			41.35
	Reason for Variance:			There will be a few more charges come through for work in March + estimate for Web API programming. I've spoken with Gregg about overrunning the budget. Once we have the estimates in CRS we will make a decision as to whether or not to proceed.
Projections as of Mar 09, 2023	Dollars Projected for Month:			1,523.37
	Actual Dollars Used:			3,451.43
	Variance (Projected minus Actual):			-1,928.06
	Reason for Variance:			Developers worked more than estimated to make system operational.
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(WJ-RAP) Woodcock-Johnson Remote Administration Project		
Project Mode	Primary: Telephone	Secondary: Face to Face	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 193,800.00	Indirect Budget: 108,527.00	Total Budget: 302,327.00
Principal	Paula Fomby (U Penn/UM/ISR/SRC)		
Investigator/Clients	Narayan Sastry (UM/ISR/SRC)		
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Hongyu Johnson		
	Budget Analyst: Ivanna lavorska-Em		
	Production Manager: Sarah Crane		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>The WJ-RAP is the continuation study from the WJ-Pilot of 2021.</p> <p>The goal of this project is to complete Woodcock Johnson Tests of Cognitive Abilities both remotely and in person, during two separate interviews, from 80 families with an average of 1.5 children aged 5-17 per family. SRO will recruit a convenience sample of 90 families in order to obtain a completed remote and in-person interview from 80 families. For the remote administration interview, a tablet computer will be sent to respondents and used to electronically display the pages of the Woodcock Johnson assessment tool while an SRO interviewer communicates via a video link on a laptop. The Respondent will return the tablet in a postage paid mailer. For the in-person interview, an SRO interviewer will travel to meet respondents in person and conduct another version of the Woodcock Johnson assessment using Woodcock Johnson easels. This project will take place from January 2023 to September 2023.</p>		
SRO Project Period	02/2023 - 12/2023		
Data Col Period	06/2023 - 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	Stephanie Chardoul - SRO SPA Sarah Crane - Survey Director (Project Consultant) and Production Manager Helen (Hongyu) Johnson - Lead Project Manager Mari Haft- SRO staff Youhong Liu - Blaise Programmer Kelly Lieske - Blaise Programmer Edward Green - Data Manager Laura Yoder - Data Operations Supervisor Jeff Smith - Data Operations Supervisor John Gawlas - HelpDesk staff David Bolt - HelpDesk Supervisor Russ Stark - DCO Staff Tyler Davis-Kean - DCO Assistant (temp)		
Other Project Name			
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; Desktop; Tablet; [UM cell] Phone; Other (external monitor)		
DE Software	NA		
QC Recording Tool	Camtasia		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Check, post (\$100)		
Payment Method	Check through STrak RPay System		

Report Period	Feb, 2023 (WJ-RAP)		Implementing
Risk Level	On Track		
Monthly Updates	Project Management:		

- Purchased the assessment materials from the publisher for the PIs
- Continue to provide updates to the PI team and the SRO Admin team
- Identified the project staff successfully
- Started to assist the technical team staff for programming and testing
- Continue to work with the financial analyst to monitor the costs

Technical System Development and Testing:

- Started Blaise 4.8 Form A programming
- Setting up Project SurveyTrak
- Worked with HD staff to prepare testing module
- Purchased and tested a new tablet to move forward
- Started image scanning work

Interviewer Hiring

- The PM will be working on the recruitment in the next months.

Training

- Plan to train from May 22 through May 31 (4 hours per day excluding Memorial Day holiday weekend 05/26-5/29)

Special Issues

Cost as of Feb 28, 2023	Total Cost to Date (direct + indirect):	18,343.54
	Est Cost at Completion (E\$AC):	309,487.94
	Total Budget:	302,327.00
	Variance (Total Budget minus- E\$AC):	-7,160.94

Reason for Variance:

The overrun was due to:

1. Significant price increased of WJ easels (2 copies of Form A)
 2. The WJ scoring sheet (Form A and Form B) costs are not in the budget
 3. Cost of using a temp staff to help on scanning images was directly charged to Non-Salary Indirect cost
- We will continue to monitor the costs to reduce the overrun through the next months.

Projections as of Feb 28, 2023	Dollars Projected for Month:	10,598.18
	Actual Dollars Used:	18,343.54
	Variance (Projected minus Actual):	-7,745.36

Reason for Variance:

The overrun was due to some unforeseen increased prices of the assessment materials and using a temp staff on the project for a specific task this month. We will continue to monitor the costs through the next months.

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

Other Measures