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## ***Survey Research Operations***

### ***Monthly Project Report***

***Sponsored Data Collection Projects and Development Initiative***





























***January 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  
(ECHO (Year 7)) Environmental Influences on Child Health Outcomes  
(EDC Midline) Every Dollar Counts Program Evaluation Midline Surveys  
(EDC-Endline) Every Dollar Counts Endline  
(EDC-SS Phases 3-4) Every Dollar Counts Semi-Structured, Phases 3-4  
(HCAP 2022) Healthy Cognitive Aging Project, 2022  
(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  
(SCA 2023) Surveys of Consumer Attitudes  
(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

## Sponsored Projects Dashboard

NonArchived Sponsored Projects				
Project	Type	Phase	Project Lead	Jan
<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>ECHO (Year 7)</i>	Sponsored	Implementing	Shonda R Kruger-Ndiaye	
<i>EDC Midline</i>	Sponsored	Closing	Barbara Lohr Ward	
<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	Planning	Barbara Lohr Ward	
<i>HRS 2022 Panel &amp; 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 &amp; Hearing Loss</i>	Sponsored	Planning	Margaret Lee Hudson	
<i>SCA 2023</i>	Sponsored	Initiation	Theresa Camelo	
<i>SRS 2021</i>	Sponsored	Planning	Barbara Lohr Ward	
<i>STARRS-LS Waves 3 &amp; 4</i>	Sponsored	Implementing	Meredith A House	

Project Name	(AFHS) American Family Health Study		
Project Mode	Primary: Web	Secondary: Mail	Total of Modes: 3
Project Type	Sponsored Projects		
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"><li>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.</li><li>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.</li><li>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.</li><li>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).</li><li>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.</li><li>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.</li><li>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.</li></ul>		
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	Jan, 2023 (AFHS)	Closing
Risk Level	On Track	
Monthly Updates	<div>December update</div> <div>Since last month the overspend on the main AFHS project decreased by \$1,500 to \$12,824 due to a refunded for voided cheques.</div> <div>Current SRO focus: Work on the two additional components, AFHS Panel Feasibility Survey and AFHS non-response follow-up has been completed. Any hours spent on AFHS tasks (projected just for Me, Colette and Dean) are being charged to the AFHS Feasibility budget. These are reported on separately in MPR.</div>	
Special Issues	The additional scope (panel feasibility and non-response follow-up) will be funded using sequestered funds (on a separate short code). The PI group have also agreed to fund the overspend on the main AFHS budget.	
Cost as of Feb 15, 2023	Total Cost to Date (direct + indirect):	2,509,481.72
	Est Cost at Completion (E\$AC):	2,509,481.72
	Total Budget:	2,490,133.00
	Variance (Total Budget minus- E\$AC):	-19,348.72
	Reason for Variance:	<div>*January 2023 update* - Since last month the overspend on the main AFHS project decreased by \$420 to \$12,404 due to a refund for uncashed cheques. This overspend will be funded using sequestering funds.</div> <div>Background (not updated but left for info.)</div> <div>The main AFHS budget has overspend amount of \$18,399 (direct). Until around February this year we have consistently forecast an underspend on the project budget. The underrun was attributed to the lower response rates. However, as the design has changed in many ways since the original proposal, the source of the underrun could be due to other changes in design along with the use of a vendor for printing, mailing and scanning. The total underrun amount was reduced with the implementation of numerous methodological experiments and increasing the sample size for Replicate 2 by 3,000 addresses.</div> <div>The main source of the overrun against projections earlier this year were respondent TOAs – we received a high number of completed paper surveys after returns had slowed. Overall, the longer than expected timeline is also a contributing factor to the overspend – we were due to begin data collection for the first replicate in September 2019 but this was delayed by six months and data collection for Replicate 2 was originally due to end in March 2021 with final deliverables due in October 2021. A portion of the overspend amount should be offset by refunded cheques. There are currently outstanding cheques to the value of \$8,680 from Replicate 2, due to be refunded from October 2022 (through to April 2023). The PI group have agreed to fund the overspend amount (this will also be paid through sequestering funds).</div>
Projections as of Feb 15, 2023	Dollars Projected for Month:	0.00

**Actual Dollars Used:** -655.20

**Variance (Projected minus Actual):** 655.20

**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
	<b>Current Goal:</b>	2000 (main IWs)	33.3%	NA
	<b>Goal at Completion:</b>	4000	33.3%	NA
	<b>Current Actual:</b>	2369	64%	NA
	<b>Estimate at Complete:</b>	2369	64%	NA
	<b>Variance:</b>	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		

<b>Description</b>	<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"> <li>• Currently testing the full process from opening the survey link to data being updated in MSMS.</li> <li>• IRB amendment has been submitted and we have responded to requested changes following the first review.</li> <li>• 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.</li> </ul> <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>		
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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	<b>Pre Production Start:</b>  <b>Pretest End:</b>  <b>Staffing Complete:</b>  <b>SS Train Start:</b>  <b>DC Start:</b>	<b>Pretest Start:</b>  <b>Recruitment Start:</b>  <b>GIT Start:</b>  <b>SS Train End:</b>  <b>DC End:</b>	
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))		
<hr/>			
Report Period	Jan, 2023 (AFHS-Additional work)		Implementing
Risk Level	On Track		
Monthly Updates	January 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. 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 a budget for this proposal.		
Special Issues			
Cost as of Feb 15, 2023	<b>Total Cost to Date (direct + indirect):</b>	53,824.74	
	<b>Est Cost at Completion (E\$AC):</b>	61,682.59	
	<b>Total Budget:</b>	50,265.00	
	<b>Variance (Total Budget minus- E\$AC):</b>	-11,417.59	
	<b>Reason for Variance:</b>	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 Feb 15, 2023	<b>Dollars Projected for Month:</b>	979.91	
	<b>Actual Dollars Used:</b>	-1,312.85	
	<b>Variance (Projected minus Actual):</b>	2,292.76	
	<b>Reason for Variance:</b>	The variance is inflated by a credit received - the actual variance is	



around \$270 (\$979.91 projected vs \$706.44 actual). The hours projected are now just for Colette and I to provide minimal support (up to 6 hrs) as needed.

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

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<b>Project Name</b>	<b>(BFY) Baby's First Years</b>												
<b>Project Mode</b>	Primary: Face to Face      Total of Modes: 1												
<b>Project Type</b>	Sponsored Projects												
<b>Budget</b>	<b>Direct Budget:</b> 5,056,486.00	<b>Indirect Budget:</b> 1,930,263.73	<b>Total Budget:</b> 6,986,749.73										
<b>Principal Investigator/Clients</b>	Dr. Greg Duncan (University of California - Irvine)												
	Dr. Kimberly Noble (Teachers College Columbia University)												
	Dr. Katherine Magnuson (University of Wisconsin)												
<b>Funding Agency</b>	National Institute of Child Health and Human Development (NICHD)												
<b>IRB</b>	<b>HUM#:</b> HUM00137963	<b>Period of Approval:</b>											
<b>Project Team</b>	<b>Project Lead:</b> Piotr Dworak												
	<b>Budget Analyst:</b> Janelle P Cramer												
	<b>Production Manager:</b> Veronica Connors-Burge												
	<b>Senior Project Advisor:</b> Stephanie A Chardoul												
	<b>Production Manager 1:</b> Margaret Lavanger												
	<b>Production Manager 2:</b> Michelle Smith												
<b>Proposal #</b>	no data												
<b>Description</b>	<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"> <li>• Baseline will occur immediately (within 24-48 hours) after birth, in the hospital;</li> <li>• Wave 1 will be a telephone interview with the mother when the child is 12 months old;</li> <li>• 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;</li> <li>• 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.</li> </ul> <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>												
<b>SRO Project Period</b>	10/2017 - 12/2020												
<b>Data Col Period</b>	04/2018 - 12/2020												
<b>Security Plan</b>	NA												
<b>Milestones</b>	<table border="0"> <tr> <td><b>Pre Production Start:</b> 10/01/2017</td> <td><b>Pretest Start:</b></td> </tr> <tr> <td><b>Pretest End:</b></td> <td><b>Recruitment Start:</b> 01/01/2018</td> </tr> <tr> <td><b>Staffing Complete:</b> 02/07/2018</td> <td><b>GIT Start:</b> 03/19/2018</td> </tr> <tr> <td><b>SS Train Start:</b> 03/20/2018</td> <td><b>SS Train End:</b> 03/22/2018</td> </tr> <tr> <td><b>DC Start:</b> 05/07/2018</td> <td><b>DC End:</b> 06/30/2022</td> </tr> </table>			<b>Pre Production Start:</b> 10/01/2017	<b>Pretest Start:</b>	<b>Pretest End:</b>	<b>Recruitment Start:</b> 01/01/2018	<b>Staffing Complete:</b> 02/07/2018	<b>GIT Start:</b> 03/19/2018	<b>SS Train Start:</b> 03/20/2018	<b>SS Train End:</b> 03/22/2018	<b>DC Start:</b> 05/07/2018	<b>DC End:</b> 06/30/2022
<b>Pre Production Start:</b> 10/01/2017	<b>Pretest Start:</b>												
<b>Pretest End:</b>	<b>Recruitment Start:</b> 01/01/2018												
<b>Staffing Complete:</b> 02/07/2018	<b>GIT Start:</b> 03/19/2018												
<b>SS Train Start:</b> 03/20/2018	<b>SS Train End:</b> 03/22/2018												
<b>DC Start:</b> 05/07/2018	<b>DC End:</b> 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)	
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Report Period	Jan, 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 require U-M Interviewers assistance through the end of the Age 4 which they are planning to extend through July 31, 2023. They also hinted at ongoing cooperation with U-M between ages 4 - and 6 but we are still waiting for more specific information.</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 743 cases were delivered to the lab</p> <p>Age 3 Staffing: 12 iwers in total NE: 1 OS + 1 NH (Trained 9/15) MN: 2 NY: 4 OS (1 consolidated in October 2022) NOLA: 1 (1 June resignation) TLs: 1 (- 1 has gone to HRS)</p> <p>Technical system: All tech systems are working as needed.</p> <p>Finances: 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 Feb 15, 2023	Total Cost to Date (direct + indirect):	6,404,593.02

<b>Est Cost at Completion (E\$AC):</b>		6,693,589.31		
<b>Total Budget:</b>		6,986,749.73		
<b>Variance (Total Budget minus- E\$AC):</b>		293,160.42		
<b>Reason for Variance:</b>		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 Pls. 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 Pls.		
<b>Projections as of Feb 15, 2023</b>	<b>Dollars Projected for Month:</b>	58,510.68		
	<b>Actual Dollars Used:</b>	48,334.77		
	<b>Variance (Projected minus Actual):</b>	10,175.91		
	<b>Reason for Variance:</b>	lwer hours were accurately projected but we continue to have savings in the project management time.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>	907	91%	7.0
	<b>Goal at Completion:</b>	907	91%	7.0
	<b>Current Actual:</b>	921	92%	5.7
	<b>Estimate at Complete:</b>	926	92%	6.0
	<b>Variance:</b>			
<b>Other Measures</b>				

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		
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Report Period	Jan, 2023 (BHM Library Project)		Initiation
Risk Level	On Track		
Monthly Updates	Please note we are starting project activities/charging in February.		
Special Issues	None		
Cost as of	Total Cost to Date (direct + indirect):		0.00
	Est Cost at Completion (E\$AC):		197,671.00
	Total Budget:		197,671.00
	Variance (Total Budget minus- E\$AC):		0.00
	Reason for Variance:		None
Projections as of	Dollars Projected for Month:		0.00
	Actual Dollars Used:		0.00
	Variance (Projected minus Actual):		0.00

Reason for Variance: None

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	<b>Project Lead:</b> Donnalee Ann Grey-Farquharson <b>Budget Analyst:</b> Carl S Remmert <b>Production Manager:</b> Stacy Quisenberry <b>Senior Project Advisor:</b> Barbara Lohr Ward <b>Production Manager 1:</b> Hongyu Johnson <b>Production Manager 2:</b> 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> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </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	Jan, 2023 (CARE Military)	Implementing	
Risk Level	On Track		
Monthly Updates	1. Project Management: The CARE Researchers continue to find various avenues to fund the continuation of military data collection beyond		

March 2023 without delaying in order to align with the civilian data collection. Some options are in the work currently.  
 SRO received the file which categorizes and prioritizes the sample into target groups and will strategize on the priority assignments  
 Donnalee continues the dialogue with UM PI to discuss endgame strategies and to plan for the next round of data collection.  
 SRO started brain storming on new interviewer production challenges for the next few months and the next data collection period. We also continue to discuss the locating reports with the Locating Team for its accuracy.  
 Some respondents asked about DOD security concerns questions, the PI will look into to address for the next round of production.

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.

3. Questionnaire Development:

The SRO team tested and signed off a few new logic changes on the Military survey questionnaire. We will deliver the interviewer-led version of the survey questionnaire to QuesGen for programming soon.

4. Production:

SRO is planning to complete 3000 military cases by the end of data collection in April 2023. We are strategizing how to reach this goal.

SRO received 2237 new sample lines in January 2023.

Although SRO received the long awaited military updated contact information, email and phone number, the majority of the updated email addresses are missing branch indication and not correct as well as a lot of updated phone numbers are for departments not for personal. The inaccuracy has brought problems to contact respondents. So, the next time we hope to get a contact info file it should be more accurate.

The SRO management team started brain storming on new interviewer production challenges for the next few months and the next data collection period.

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 01/31/2023:

10548 Released: Total Comp lws-2468 -23.5% (Web-2434 -23.2%, CATI-34 -0.3%)

5. Hiring and Training:

One TL left the project for her other project commitment. Some Interviewers who were hired to work on the Military sample only will be moving to other projects when data collection ends in spring 2023.

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

6. DMSS:

All the military subjects just finished SYS contacting (12/16/22-1/17/23).

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: 403 found/ 840(ever Loc)= 48.5%

<b>Special Issues</b>				
<b>Cost as of Jan 31, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>			964,861.83
	<b>Est Cost at Completion (E\$AC):</b>			1,418,423.47
	<b>Total Budget:</b>			1,426,001.00
	<b>Variance (Total Budget minus- E\$AC):</b>			7,577.53
	<b>Reason for Variance:</b>			Extra funding of \$100,000 (direct cost) and \$26,000 (indirect cost) were added to the project after the proposed budget was finalized. We have been monitoring the amount of the underrun and making adjustment. We have been strategizing to boost production and minimize the underrun through the next few months.
<b>Projections as of Jan 31, 2023</b>	<b>Dollars Projected for Month:</b>			62,005.88
	<b>Actual Dollars Used:</b>			52,722.75
	<b>Variance (Projected minus Actual):</b>			9,283.13
	<b>Reason for Variance:</b>			
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
<b>Other Measures</b>				



<b>Project Name</b>	<b>(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022</b>												
<b>Project Mode</b>	Primary: Telephone	Secondary: Web	Total of Modes: 2										
<b>Project Type</b>	Sponsored Projects												
<b>Budget</b>	<b>Direct Budget:</b> 3,718,978.00	<b>Indirect Budget:</b> 966,936.00	<b>Total Budget:</b> 4,685,914.00										
<b>Principal Investigator/Clients</b>	Dr. Steven Broglio (U of M Kinesiology)												
	Dr. Michael McCrea (Medical College of Wisconsin)												
	Dr. Thomas McAllister (Indiana University School of Medicine)												
<b>Funding Agency</b>													
<b>IRB</b>	<b>HUM#:</b> 00202691	<b>Period of Approval:</b> 7/23/2021 - open											
<b>Project Team</b>	<b>Project Lead:</b> Donnalee Ann Grey-Farquharson												
	<b>Budget Analyst:</b> Carl S Remmert												
	<b>Production Manager:</b> Stacy Quisenberry												
	<b>Senior Project Advisor:</b> Barbara Lohr Ward												
	<b>Production Manager 1:</b> Hongyu Johnson												
	<b>Production Manager 2:</b> Keith Liebetreu												
<b>Proposal #</b>	no data												
<b>Description</b>	<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>												
<b>SRO Project Period</b>	10/2021 - 08/2026												
<b>Data Col Period</b>	03/2022 - 02/2026												
<b>Security Plan</b>	NA												
<b>Milestones</b>	<table> <tr> <td><b>Pre Production Start:</b></td><td><b>Pretest Start:</b></td></tr> <tr> <td><b>Pretest End:</b></td><td><b>Recruitment Start:</b></td></tr> <tr> <td><b>Staffing Complete:</b></td><td><b>GIT Start:</b></td></tr> <tr> <td><b>SS Train Start:</b></td><td><b>SS Train End:</b></td></tr> <tr> <td><b>DC Start:</b></td><td><b>DC End:</b></td></tr> </table>			<b>Pre Production Start:</b>	<b>Pretest Start:</b>	<b>Pretest End:</b>	<b>Recruitment Start:</b>	<b>Staffing Complete:</b>	<b>GIT Start:</b>	<b>SS Train Start:</b>	<b>SS Train End:</b>	<b>DC Start:</b>	<b>DC End:</b>
<b>Pre Production Start:</b>	<b>Pretest Start:</b>												
<b>Pretest End:</b>	<b>Recruitment Start:</b>												
<b>Staffing Complete:</b>	<b>GIT Start:</b>												
<b>SS Train Start:</b>	<b>SS Train End:</b>												
<b>DC Start:</b>	<b>DC End:</b>												
<b>Other Project Team Members</b>	Donnalee Grey-Farquharson, Stacy Quisenberry, Hongyu Johnson, Keith Liebetreu, James Koopman, Minako Edgar, David Ackuaku, Carl Remmert												
<b>Other Project Name</b>	CARE CSI, CARE SALTOS												
<b>Sample Mgmt System</b>	Other (non-SRO)												
<b>Data Col Tool</b>	Other (non-SRO)												
<b>Hardware</b>	Laptop; [UM cell] Phone												
<b>DE Software</b>	N/A												
<b>QC Recording Tool</b>	N/A												
<b>Incentive</b>	Yes, R												
<b>Administration</b>	UM Group (Kinesiology)												
<b>Payment Type</b>	Check, post (\$150.00)												

Payment Method	Check through other system (UM)			
<div></div>				
Report Period	Jan, 2023 (CARE SALTOS MTEC)		Implementing	
Risk Level	On Track			
Monthly Updates	<div>1. Project Management: SRO received the file which categorizes and prioritizes the sample into target groups and will strategize on the priority assignments. Donnalee continues the dialogue with UM PI to discuss endgame strategies and to plan for the next round of data collection. Donnalee requested QG to provide 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.</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.</div> <div>3. Questionnaire Development: SRO tested and signed off a few new logic changes on the Civilian survey questionnaire. We will deliver the modified interviewer-led version of the survey questionnaire to QuesGen for programming soon.</div> <div>4. Production: SRO is planning to complete 3200 civilian cases by the end of data collection in April 2023. We are strategizing how to reach this goal. SRO received 2441 new sample lines in January 2023. The management team started brain storming on new interviewer production challenges for the next few months and the next data collection period. 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 01/31/2023: 10597 Released: Total Comp lws-2599 – 24.6% (Web-2564 -24.3%, CATI-35-0.3%)</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 that will focus on reinforcing field protocols and explaining system and survey questionnaire updates.</div> <div>6. DMSS: SRO realized that the civilian subjects didn't have System Contacting (such as bulk emails sent) since August 2023. We might miss contacting the civilian subjects who went through the system in the beginning of August about the study participation. So SRO requested QuesGen immediately to follow up with these civilian subjects via System Contacting effort.</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: 211 found/ 733(ever loc) = 29.5%</div>			
Special Issues				
Cost as of Jan 31, 2023	Total Cost to Date (direct + indirect):		882,512.74	
	Est Cost at Completion (E\$AC):		4,622,673.41	
	Total Budget:		4,685,914.00	
	Variance (Total Budget minus- E\$AC):		63,240.59	
	Reason for Variance:			
Projections as of Jan 31, 2023	Dollars Projected for Month:		36,931.26	
	Actual Dollars Used:		31,145.18	
	Variance (Projected minus Actual):		5,786.08	
	Reason for Variance:			
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(CRUSE - AHDFS) Survey on Crypto-Asset Adoption and Use / American Household Digital Finance Survey		
Project Mode	Primary: Web	Secondary: Focus Group	Total of Modes: 2
Project Type	Sponsored Projects		
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	Jan, 2023 (CRUSE - AHDFS)		Implementing
Risk Level	On Track		
Monthly Updates	Crypto data collection has launched on 11/3 with 507 invitations to Rep 1 and other Reps followed soon. Rep sizes, launch dates, and the current status are listed below.		

1: 507 11/3/2022, moved to SSL non-response follow up on 11/29  
 2: 2,049 11/10/2022, moved to SSL NRFU on 12/07  
 3 & 4: 7,684 11/15/2022, moved to SSL NRFU on 12/13  
 Total: 10,240

Between 1/20 and 2/17 we have added 21 completes from SSL non-response follow up effort and now have 1076 completes of the 1529 goaled completes representing 10.5% response rate (goal 14.9%).

PIs and Coinbase approved incentive increases from \$30 - \$50 and our redesigned end-game mailing is mailing out 2/20 - 21 to ~ 9,100 cases which have been mailed before. We expect a 5% response on the mailings which would meet the project goals.

SSL effort continues re-focusing on communicating incentive increases and the new mailing. Despite excellent effort including both calling and texting and with high dials per hour the number of surveys completed after the calls is low (only ~ 20 per month).

We are also having trouble filling all projected interviewing hours, Feb through March we requested 896 STI and STII hours but were only able to secure 620. With the existing hours and high DPH we should be able to call everyone one more time to remind them about the incentive increase and the mailing. However, the under-allocation will continue to increase our underrun.

To aid their effort, interviewers are now able to send two new text messages reminding about the \$50 increase and that the study is ending. We continue to use differential strategies for priority cases and follow up more exhaustively with any case for which we confirmed the right address.

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:

Facing underrun \$25K after Dec, we engaged U-M Law to clarify their billings to the project. We came up with a scenario which included all U-M Law fees and the prospect of the new incentive \$50 incentive increase. The scenario called for a slight \$12K increase to the total budget from \$635K to \$657K. The increase has been approved by Coinbase. However, since the approval we have been underrunning against the scenario and the prospective iwer hours continue to be lower than projected.

<b>Special Issues</b>				
<b>Cost as of Feb 15, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>			361,565.39
	<b>Est Cost at Completion (E\$AC):</b>			572,632.67
	<b>Total Budget:</b>			635,344.00
	<b>Variance (Total Budget minus- E\$AC):</b>			62,711.33
	<b>Reason for Variance:</b>			Underrun is mostly due to not reaching the projected iwer hours. Lower actual hours allowed us to extend the lab involvement through March but the underrun is still growing. In January, the cost to finish was examined with U-M Law which collects 5% admin fee from the same budget. After adjustments the PI requested and Coinbase approved a slight budget increase to \$657K to make sure all fees and projected end-game incentive increases are appropriately funded. Given our current spend / level of iwer hours we expect to end below that cost.
<b>Projections as of Feb 15, 2023</b>	<b>Dollars Projected for Month:</b>			75,192.64
	<b>Actual Dollars Used:</b>			38,757.53
	<b>Variance (Projected minus Actual):</b>			36,435.11
	<b>Reason for Variance:</b>			We used less iwer hours than expected and continue to have savings due to staffing reassignments.
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>	1529	14.9%	
	<b>Goal at Completion:</b>	1529	14.9%	
	<b>Current Actual:</b>	970	9.5%	
	<b>Estimate at Complete:</b>	1529	14.9%	
	<b>Variance:</b>			
<b>Other Measures</b>				

<b>Project Name</b>	<b>(ECHO (Year 7)) Environmental Influences on Child Health Outcomes</b>		
<b>Project Mode</b>	Primary: Face to Face	Secondary: Telephone	Total of Modes: 3
<b>Project Type</b>	Sponsored Projects		
<b>Budget</b>	<b>Direct Budget:</b> 384,033.00	<b>Indirect Budget:</b> 215,058.00	<b>Total Budget:</b> 599,091.00
<b>Principal Investigator/Clients</b>	Nigel Paneth (Michigan State University)		
	Michael Elliott (University of Michigan )		
	Jean Kerver (Michigan State University)		
<b>Funding Agency</b>	NIH		
<b>IRB</b>	<b>HUM#:</b> HUM00139050	<b>Period of Approval:</b> 10/2/2021-8/13/2022	
<b>Project Team</b>	<b>Project Lead:</b> Shonda R Kruger-Ndiaye		
	<b>Budget Analyst:</b> William Lokers		
	<b>Production Manager:</b>		
	<b>Senior Project Advisor:</b> Evanthia Leissou		
	<b>Production Manager 1:</b> Ian Ogden		
	<b>Production Manager 2:</b> Sharon K Parker		
<b>Proposal #</b>	no data		
<b>Description</b>	<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>		
<b>SRO Project Period</b>	01/2017 - 08/2023		
<b>Data Col Period</b>	05/2018 - 08/2023		
<b>Security Plan</b>	NA		
<b>Milestones</b>	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </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**

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

<b>Report Period</b>	Jan, 2023 (ECHO (Year 7))	Implementing
<b>Risk Level</b>	On Track	
<b>Monthly Updates</b>	<p>[Phase 1: Recruitment and Prenatal Surveys]</p> <p>The MARCH recruitment target was 1,110 mothers / live births. Recruitment is done and the final count is 1,113.</p> <p>-----</p> <p>[Phase 2: 3-Month Data Collection Summary as of 2/20/23]</p> <p>3-month sample released: 992</p> <p>3-month interviews completed: 714</p> <p>Average attempts / lw: 7.6</p> <p>lw length: 36 min</p> <p>Response Rate: 73%</p> <p>3-month biospecimen collected: 403</p> <p>-----</p> <p>[Phase 3: Age 4 REDCap Survey as of 2/20/23]</p> <p>Age-4 sample released: 284</p> <p>REDCap surveys completed: 187</p> <p>Response Rate: 66%</p> <p>-----</p> <p>[Phase 3: Age 4 In-Person Visit Protocols as of 2/20/23]</p> <p>Age-4 IPV sample released: 145</p> <p>In-person visits completed: 47</p>	

<b>Special Issues</b>	MSU's plan to close out data collection by the August 2023 end of funding remains largely undefined. The SRO team prepared a table reflecting the components we will need to shut down or transition and requested information on the requested close-out plan. We hope to learn more at a 2/22 check-in with MSU. There is also interest on the part of the U-M PI to roll any unused SRO funds into blood spot analysis. The exact plan is still TBD.
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<b>Cost as of Feb 15, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>	217,681.09
	<b>Est Cost at Completion (E\$AC):</b>	510,966.02
	<b>Total Budget:</b>	599,091.00
	<b>Variance (Total Budget minus- E\$AC):</b>	88,124.98
	<b>Reason for Variance:</b>	The significant decrease in projected costs is due to removing contingent staff hours so that those that remain reflect the maximum hours we expect our current staff would be able to work through July 2023. We had previously rolled our projected underrun into additional contingent staff hours. 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.

<b>Projections as of Feb 15, 2023</b>	<b>Dollars Projected for Month:</b>	28,940.42
	<b>Actual Dollars Used:</b>	22,489.91
	<b>Variance (Projected minus Actual):</b>	6,450.51

**Reason for Variance:** Interviewer hours came in ~\$4,500 (DC, unloaded) lower than projected (as the projection was inflated by our having rolled our underrun into more iwer hours than we actually had staff to work). Many other lines also came in slightly lower than projected.

Measures		Units at Complete	RR	HPI
	<b>Current Goal:</b>	See Monthly Updates		
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			

Other Measures

Project Name	(EDC Midline) Every Dollar Counts Program Evaluation Midline Surveys		
Project Mode	Primary: Telephone	Secondary: Face to Face	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 1,513,016.00	Indirect Budget: 611,135.00	Total Budget: 2,124,151.00
Principal	Elizabeth Rhodes (OpenResearch Lab)		
Investigator/Clients	Stephanie Chardoul (Survey Research Operations)		
	Sarah Miller (Universityof Michigan)		
Funding Agency			
IRB	HUM#: HUM00145626/CR000904		Period of Approval: 1/25/2021-1/18/2022
Project Team	Project Lead: Barbara Lohr Ward		
	Budget Analyst: Megan Gomez-Mesquita		
	Production Manager: Barbara Aghababian-Homburg		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Donnalee Ann Grey-Farquharson		
	Production Manager 2: Melissa Luker		
Proposal #	no data		
Description	<p>The overall project is funded by a consortium (currently consisting of both OpenResearch Lab (Open) and NIH.</p> <p>OpenResearch Lab (Open) (formerly Y Combinator Research) and the principal investigators are conducting an evaluation of Every Dollar Counts, a cash assistance gift program being administered by two non-profit organizations: CitySquare, based in Dallas, Texas, and Heartland Alliance, located in Chicago, Illinois (the Community Partners).</p> <p>The purpose of this study is to explore how the program affects multiple dimensions of recipients' lives. Key outcomes of interest include health, subjective and material well-being, time use, financial health, labor market participation, social and civic engagement, and effects on children. SRO concluded the Baseline interviews in 2020. The EDC Midline will reach out to all Baseline respondents by either telephone or face-to-face over a five-month period in 2022 to request their participation in the Midline interview.</p> <p>This budget assumes an SRO involvement period of 14 months commencing September 2021, with the data collection taking place during a 5-month period, starting March 2022.</p> <p>SRO assumes approximately 89% of the 3,000 Baseline respondents are located and willing to be interviewed again. SRO cannot guarantee a response rate; however, this is our best estimate of the outcome based on effort. SRO will monitor effort, track project progress, and continually evaluate how the project progress aligns with our budget assumptions. Informed by our experience with panel studies, we feel that an 89% overall response rate is a reasonable expectation given the current design, the resources allocated in the current budget, and the design of the EDC Program (which has allowed for multiple, between-wave contacts and updated contact information for most of the sample).</p> <p>The SRO budget includes effort to complete face-to-face interviews with approximately 120 (out of 150) “hard to reach” cases identified by Open. The budget assumes approximately 120 of those cases are interviewed in person and are given a \$100 a case token of appreciation for participation in the interview (to be conservative we have included funds for 150 tokens of appreciation). Approximately 1,950 interviewer hours are allocated for these activities (based on an estimated HPI of 10.0 for the interviews and 5.0 for the initial contact attempt/locating). Mileage costs for fieldwork are budgeted at 270 trips that average 52 miles per trip.</p> <p>All remaining cases will be interviewed by telephone (approximately 2,550 interviews). Telephone interviews will be administered from the SSL and by decentralized field staff. With each respondent, SRO will:</p> <ul style="list-style-type: none"><li>- Confirm continued consent to participate (no actual consent forms will be reviewed with respondents, and no signatures are required at the midline measurement)</li><li>- Request contact information for friends and family to help locate the respondent in the future if we cannot reach them</li><li>- Administer the questionnaire (approximately 80 minutes in length)</li></ul> <p>Approximately 14,635 interviewer hours are allocated for these activities (based on estimated HPIs of 5.5 and 6.0 for telephone interviews completed by the SSL and by decentralized field interviewers, respectively).</p> <p>Post Collection Processing:</p> <ul style="list-style-type: none"><li>• SRO will conduct standard data cleaning and produce a preliminary and final dataset with documentation. Standard data cleaning does not include customization (such as derived variable or index creation, dataset merging, sample weighting, recoding, or coding of other-specify responses). We will ensure that all components of a case are present with a reference variable (SID, OID) present to allow for merging and data analysis. Our main documentation is conveyed through data dictionaries and questionnaire codebook.</li><li>• We have not budgeted for coding any open-ended responses.</li></ul> <p>Deliverables:</p> <ul style="list-style-type: none"><li>• SRO will provide daily, automated delivery of questionnaire data and sample management system data for cases with a final disposition and sample management system data for all cases that have been released to interviewers.</li><li>• Sample management data that will be delivered daily to Open will include the following case-level variables:<ul style="list-style-type: none"><li>o Contact attempts ??number by type (SMS, phone, email, in-person)</li><li>??date/time of last attempt</li><li>o Appointments ??date/time of scheduled appointments</li><li>??dummy variables for the occurrence of broken / missed appointments</li><li>??how appointment was made (self-scheduler/by interviewer)</li><li>o Current incentive assigned to the sample line</li><li>o SRO will work with Open during pre-production to finalize variables and format.</li></ul></li></ul>		



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

SRO Project Period	09/2021 - 10/2022			
Data Col Period	03/2022 - 07/2022			
Security Plan	NA			
Milestones	<div><div><div>Pre Production Start:</div><div>Pretest End:</div><div>Staffing Complete: 03/04/2022</div><div>SS Train Start: 02/28/2022</div><div>DC Start: 04/04/2022</div></div><div><div>Pretest Start:</div><div>Recruitment Start: 01/01/2022</div><div>GIT Start: 02/26/2022</div><div>SS Train End: 03/31/2022</div><div>DC End: 08/14/2022</div></div></div>			
Other Project Team Members	Kirsten Alscer (SPA), Barbara Ward (Project Lead) , Donnalee Grey-Farquharson (Project Manager) Marsha Skoman (Tech Lead), Jeff Smith (Tech Lead backup), Peter Sparks (Blaise Programmer), Ashwin Dey (Webtrak Programmer), Stephanie Windisch (Data Manager), Barb Homburg (Production manager, Field), William Keating (Production manager, SSL), Megan Gomez-Mesquita (Financial Analyst)			
Other Project Name	EDC			
Sample Mgmt System	SurveyTrak			
Data Col Tool	Blaise 4.8			
Hardware	Laptop; [UM cell] Phone			
DE Software	N/A			
QC Recording Tool	Camtasia			
Incentive	Yes, R			
Administration	SRO Group; Other (PI Payment)			
Payment Type	Cash, prepaid (\$50 Goodwill Token); Cash, post (\$50); Other (\$50 - Kept Appt)			
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox); Other (Electronic payment by PIs)			
<div></div>				
Report Period	Jan, 2023 (EDC Midline)		Closing	
Risk Level	On Track			
Monthly Updates	Task 1 Midline: Management, Budget and Work Plan <ul style="list-style-type: none"><li>• Reviewed cost reports, expenses, investigated late charges.</li><li>• Investigated late charges</li><li>• Prepared financial statements.</li></ul>			
Special Issues				
Cost as of Feb 15, 2023	Total Cost to Date (direct + indirect):		1,635,124.07	
	Est Cost at Completion (E\$AC):		1,635,124.07	
	Total Budget:		2,124,151.00	
	Variance (Total Budget minus- E\$AC):		489,026.93	
	Reason for Variance:		The use of the self-scheduler was far more productive than had been anticipated, with very high usage rates by respondents. HPI was 3.0 versus 6.5 budgeted, leading to a large anticipated underrun.	
Projections as of Feb 15, 2023	Dollars Projected for Month:		0.00	
	Actual Dollars Used:		514.72	
	Variance (Projected minus Actual):		-514.72	
	Reason for Variance:		These are late-hitting charges and timesheet corrections.	
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(EDC-Endline) Every Dollar Counts Endline		
Project Mode	Primary: Telephone	Secondary: Face to Face	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 2,382,700.00	Indirect Budget: 714,811.00	Total Budget: 3,097,511.00
Principal	Stephanie Chardoul (SRO)		
Investigator/Clients	Sarah Miller (Ross Business School)		
Funding Agency			
IRB	HUM#: HUM00164105	Period of Approval: 12/23/2022-12/23/23	
Project Team	Project Lead: Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Barbara Aghababian-Homburg		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Karin Schneider		
	Production Manager 2: Donnalee Ann Grey-Farquharson		
Proposal #	no data		
Description	<p>The overall project is funded by a consortium (currently consisting of both OpenResearch Lab (Open) and NIH. OpenResearch Lab (Open) (formerly Y Combinator Research) and the principal investigators are conducting an evaluation of Every Dollar Counts, a cash assistance gift program being administered by two non-profit organizations: CitySquare, based in Dallas, Texas, and Heartland Alliance, located in Chicago, Illinois (the Community Partners).</p> <p>The purpose of this study is to explore how the program affects multiple dimensions of recipients' lives. Key outcomes of interest include health, subjective and material well-being, time use, financial health, labor market participation, social and civic engagement, and effects on children. SRO concluded the Baseline interviews in 2020, and the Midline interviews in July 2022. The EDC Endline project will reach out to all Baseline respondents for completion of a telephone interview, followed by an in-person interview (with cognitive tasks, anthropometric measurements and collection of dried blood spots) for those respondents still in the greater Chicago area or greater Dallas/Ft. Worth area. Data collection will take place between March 2023 and late September 2023. SRO assumes approximately 91% of the 2,990 Baseline respondents are located and willing to be interviewed again (2,720 90-minute telephone interviews). SRO assumes that in-person interviews will be completed with 2,003 respondents still living in the greater Chicago or Dallas/Ft. Worth and Waco area. About 400 respondents are known to currently reside outside of these areas; these respondents will not be asked to complete an in-person interview. The in-person interviews will include collection of consent for administrative data collection, collection of Social Security number, completion of self-administered on-line cognitive assessments, collection of blood pressure, height, weight, and dried blood spots. We assume that 1,957 respondents will participate in the dried blood spot collection. Following collection of the dried blood spots, SRO interviewers will package and ship the dried blood spot cards to the laboratory chosen by ORL.</p> <ul style="list-style-type: none"><li>• 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.</li><li>• The budget assumes approximately 2,003 cases complete the in-person component and 1,957 consent to the DBS collection.</li><li>• Mileage costs for fieldwork are budgeted at 2,003 trips of no more than 120 miles per round trip.</li><li>• 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.</li><li>• 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.</li></ul> <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"><li>• 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.</li><li>• Sample management data that will be delivered daily to Open will include the following case-level variables:<ul style="list-style-type: none"><li>o Contact attempts</li><li>? number by type (SMS, phone, email, in-person)</li><li>? date/time of last attempt</li><li>o Appointments</li><li>? date/time of scheduled appointments</li><li>? occurrence of broken / missed appointments</li><li>? how appointment was made (self-scheduler/by interviewer)</li><li>o Current incentive assigned to the sample line</li><li>o SRO will work with Open during pre-production to finalize variables and format.</li></ul></li><li>• 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.</li><li>• SRO will also deliver:<ul style="list-style-type: none"><li>o Daily data collection progress reports</li><li>o A final summary of field methods at the end of data collection</li><li>o A full survey dataset with all participant contact information at the close of data collection.</li></ul></li></ul>		

SRO Project Period	01/1996 - 01/1996	
Data Col Period		
Security Plan	NA	
Milestones	<div><div><div><b>Pre Production Start:</b> 09/01/2022</div><div><b>Pretest End:</b></div><div><b>Staffing Complete:</b> 02/27/2023</div><div><b>SS Train Start:</b> 03/20/2023</div><div><b>DC Start:</b> 03/27/2023</div></div><div><div><b>Pretest Start:</b></div><div><b>Recruitment Start:</b> 02/01/2023</div><div><b>GIT Start:</b></div><div><b>SS Train End:</b> 03/24/2023</div><div><b>DC End:</b> 08/19/2023</div></div></div>	
Other Project Team Members	In addition to the above: Ian Ogden (SSS, Tech Coordinator); Anna Fuqua-Smith (SSI); Austin De Spirito (SSA); Jeff Smith (Tech Lead); Marsha Skoman (SurveyTrak); Heuchun Peng and Shaowei Sun (Self-Scheduler); Peter Sparks & Kelly Liesko (Blaise); Stephanie Windisch and Jennie William (Data Management); Ashwin Dey and Darnell Franklin (Webtrak, Weblog, Reports)	
Other Project Name		
Sample Mgmt System	SurveyTrak; Project specific system (Self-Scheduler for Telephone)	
Data Col Tool	Blaise 4.8; Other (ArcGIS - Survey 123)	
Hardware	Laptop; [UM cell] Phone	
DE Software	N/A	
QC Recording Tool	DRI-CARI	
Incentive	Yes, R; Yes, INF	
Administration	SRO Group; Other (PI Payment)	
Payment Type	Cash, post (\$10 or \$20 For Dried Blood Spots); Other (\$20 Finders Fee)	
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)	
Report Period	Jan, 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 January 2023, SRC activities on the EDC Midline and EDC Endline project included the following:</p> <p>Task 1 Endline: Management, Budget and Work Plan</p> <ul style="list-style-type: none"><li>• Participated in project meetings with ORL to discuss scope, cost projections and schedule for EDC Endline</li><li>• Financial<ul style="list-style-type: none"><li>o Reviewed monthly project expenses for Midline and Endline. Updated projections and produced reports.</li><li>o Revised projected costs to remove estimated expenditures for in-person interviewing</li></ul></li><li>• Programming/Specification<ul style="list-style-type: none"><li>o Reviewed/specified further Endline questionnaire edits for telephone &amp; In-person, provided to programmer</li><li>o Conducted repeated rounds of questionnaire testing</li><li>o Conducted testing of the self-scheduler</li><li>o Revised SurveyTrak specifications as needed</li><li>o Researched errors in skip patterns</li></ul></li><li>• Production Preparation<ul style="list-style-type: none"><li>o Drafted procurement documents for kitting for the in-person survey, responded to procurement questions regarding the RFQ</li><li>• Training preparation<ul style="list-style-type: none"><li>o Began review of training agenda for a virtual telephone training</li></ul></li></ul></li></ul> <p>Task 1 Midline: Management, Budget and Work Plan</p> <ul style="list-style-type: none"><li>• Reviewed cost reports, expenses, investigated late charges.</li><li>• Investigated late charges</li><li>• Prepared financial statements.</li></ul> <p>Task 2: Sampling</p> <ul style="list-style-type: none"><li>• No activity this month</li></ul> <p>Task 3: Questionnaire Development</p> <ul style="list-style-type: none"><li>• Refined specifications for telephone and in-person instruments</li><li>• Conducted testing on the Endline telephone instrument</li><li>• See Management Task for other questionnaire development activities</li></ul> <p>Task 4: CAI Programming</p> <ul style="list-style-type: none"><li>• Continued programming Endline telephone questionnaire changes resulting from testing, further specification development.</li><li>• Updated post-interview observations and contact observations specification</li></ul> <p>Task 5: Systems Programming</p> <ul style="list-style-type: none"><li>• Sample Management Systems<ul style="list-style-type: none"><li>o Continued editing of SurveyTrak specifications for Endline</li><li>o Conducted iterative rounds of testing in SurveyTrak, resolved bugs and re-tested</li><li>o Prepared testing preload for SurveyTrak, Self-Scheduler and Blaise applications</li></ul></li></ul>	

- o Updated QR codes for texts and emails
- o Prepared additional testing lines for SurveyTrak and Blaise
- o Removed links to in-person interview
- 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 virtual training agenda for interviewers and team leaders; made adjustments as necessary
- Created timeline for materials printing
- 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**

Approved EDC Endline Work Scope Changes

- Work on the in-person portion of the survey data collection was officially put on hold on Jan 24, 2023.
- 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.

<b>Cost as of Feb 15, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>	178,515.48
	<b>Est Cost at Completion (E\$AC):</b>	2,015,870.17
	<b>Total Budget:</b>	3,097,511.00
	<b>Variance (Total Budget minus- E\$AC):</b>	1,081,640.83
	<b>Reason for Variance:</b>	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.
<b>Projections as of Feb 15, 2023</b>	<b>Dollars Projected for Month:</b>	113,254.97
	<b>Actual Dollars Used:</b>	61,639.66
	<b>Variance (Projected minus Actual):</b>	51,615.31
	<b>Reason for Variance:</b>	We had expected to be recruiting new hires in January and February, however recruitment was put on hold due to lack of NIH funding. Programming was lower than anticipated, again due to the fact that the in-person survey protocol has been put on hold. All procurement activities were also place on hold mid-month, which has resulted in fewer staff hours.

Measures		Units at Complete	RR	HPI
	<b>Current Goal:</b>	2721	91%	3.0
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			

**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 Phase3.		
SRO Project Period	10/2021 - 01/2023		
Data Col Period	11/2021 - 12/2022		
Security Plan	NA		
Milestones	<div>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</div>		
Other Project Team Members	Ashwin Dey, Becky Loomis, Andrea Pearce, Marsha Skoman, Peter Sparks, Stephanie Windisch		
Other Project Name	"Phase 3/4" is often referred to as "Round 3/4"		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone		
DE Software	N/A		
QC Recording Tool	DRI-CXM		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	NA		
Payment Method	Check through other system (API through STrak to PI's payment system)		
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Report Period	Jan, 2023 (EDC-SS Phases 3-4)		Closing
Risk Level	On Track		
Monthly Updates	Completed the last few interviews by end of January as planned. 117 of 121 iws completed.		
Special Issues	None.		
Cost as of Jan 17, 2023	Total Cost to Date (direct + indirect):		305,435.36
	Est Cost at Completion (E\$AC):		319,076.86
	Total Budget:		408,935.00
	Variance (Total Budget minus- E\$AC):		89,858.14
	Reason for Variance:	Underrun has existed since PI decided all interviewing would be done by phone.	
Projections as of Jan 17, 2023	Dollars Projected for Month:		24,088.11
	Actual Dollars Used:		19,516.11

## Reason for Variance:

Slightly lower activity in final month of interviewing.

Measures		Units at Complete	RR	HPI
	<b>Current Goal:</b>			5
	<b>Goal at Completion:</b>	117	97	5
	<b>Current Actual:</b>		97	6.7
	<b>Estimate at Complete:</b>	117	97	6.7
	<b>Variance:</b>	0	0	1.7

## Other Measures

interviewing completed with 97% RR

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		

<b>Report Period</b>	Jan, 2023 (HCAP 2022)	Implementing
<b>Risk Level</b>	Some Concerns	
<b>Monthly Updates</b>	<p>HCAP production has been underway for 31 weeks and is going well. As of this morning, 2,402 interviews have been completed, including 1,323 R and 1,079 Inf. There are currently 237 appts (142R, 95Inf). The overall HPI is 4.75. 132 Spanish interviews have been completed (75 R, 57 Inf). There are currently 28 interviewers on staff. The budget was created prior to 2020 data collection, but the project was paused due to the Covid-19 pandemic and started in 2022. We are still using the same HCAP 2020 budget. We are projecting an overrun, and have made updates to the budget to account for several items that have led to this, as outlined in previous month's MPRs. The factors contributing to the overrun are:</p> <ol style="list-style-type: none"> <li>When the current budget was approved for HCAP2020, the budget was capped. Iwer hours were cut from ~28,000 to ~21,000 but interview goals remained the same.</li> <li>The sample size increased for 2022 (N=6,033) while the 2020 budget was developed to accommodate the smaller sample size (N=5,655). This has caused an increase in the following costs: <ol style="list-style-type: none"> <li>Respondent payments (although amount budgeted in 2020 is sufficient for 2022 sample size)</li> <li>Travel costs</li> </ol> </li> </ol>	

### 3. Materials

- c. Since 2020, travel costs and materials/duplicating costs have increased significantly due to inflation and caused increases in spending on these items aside from the increased sample size.
- d. There was a low level of management activity to maintain the project between 2020 and 2022 when FTF data collection was not possible, that was not projected for.
- e. Lwer rates have increased since pre-2020.
- f. The 2020 budget assumed 1 training but we needed 2.

Project staff and PIs are aware of and expected this overrun. The cost increases assume the project ends in August 2023 as projected. It is unknown if HRS will extend and if so, if HCAP would be extend as well. If this were the case, we would need to adjust scope or funding would need to be increased. We are currently working through a cost scenario in the sandbox in which data collection ends in December, as HRS is discussing extending. The current cost increase assumes no more interviewer trainings. If another training is needed, that would need to be supplemented as well. At this point we are not expecting the need for an additional training, but it is dependent on lwer retention for the next 8 months.

We have been discussing ways to cut costs to decrease the underrun. The PIs have suggested we remove one sample type, the Recontacts. This group were in the HCAP sample as well in 2016 but refused. 208 Recons have already been released to HCAP and we have done 64 interviews. They require more contacts per interview than the other sample, about 6 contacts average. We will attempt to contact the remaining 144 only 6 times and close them out as NI if we are unable to interview them. We will not release any more Recons into the HCAP sample. We are currently doing analysis to determine how much money we will save by eliminating the Recon subgroup, and projecting how many interviews we think we can complete under the current budget.

We are currently working on amendment to allow verbal phone consent for informants. 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. The Blaise language and brochures are also being translated into Spanish and reformatted to have a different appearance from the R brochure. We are creating a tab under View/Edit in Surveytrak for the lwers to record whether they mailed the brochure or left it for the Inf. We will submit this to IRB once the materials are translated and formatting is complete.

<b>Special Issues</b>	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.			
<b>Cost as of Feb 15, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>			2,286,733.04
	<b>Est Cost at Completion (E\$AC):</b>			4,930,285.20
	<b>Total Budget:</b>			4,488,000.00
	<b>Variance (Total Budget minus- E\$AC):</b>			-442,285.20
	<b>Reason for Variance:</b>	lwer hours are not all accounted for due to a budget cap when the budget was developed.		
<b>Projections as of Feb 15, 2023</b>	<b>Dollars Projected for Month:</b>			307,418.41
	<b>Actual Dollars Used:</b>			223,610.81
	<b>Variance (Projected minus Actual):</b>			83,807.60
	<b>Reason for Variance:</b>	Not all lwer hours hit yet.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>	2421		
	<b>Goal at Completion:</b>	7060	76%	
	<b>Current Actual:</b>	2402	48%	4.75
	<b>Estimate at Complete:</b>		76%	
	<b>Variance:</b>			
<b>Other Measures</b>	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: Tagh Reid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 600 interviews with recently identified Arab Americans aged 65 or older residing in Southeast Michigan and 330 interviews with Social Relations sample members aged 65 or older. The Arab American sample will be selected based on an in-person household screening. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements. Social Relations respondents will only complete the cognitive interview. An informant interview will also be conducted for all sample members. Interviews will be conducted in English or Arabic. A pretest will be conducted in August 2019 with main data collection occurring from November 2019 through July 2020.		
SRO Project Period	05/2019 - 03/2023		
Data Col Period	05/2023 - 03/2024		
Security Plan	No		
Milestones	<div> <div> Pre Production Start: 12/01/2022  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: </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	Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan)		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	DRI-CARI; Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	SRO Group		
Payment Type	Cash, prepaid (\$75 respondent, \$25 informant)		
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)		
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Report Period	Jan, 2023 (Health and Well Being in SE MI)		Planning
Risk Level	Attention!		
Monthly Updates	<p>During January 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"> <li>Held meetings with the DAWN research team to discuss study funding. scope and schedule for D-Amp and SRS.</li> <li>Began work to assemble a schedule for project launch</li> <li>Financial <ul style="list-style-type: none"> <li>Prepared cost reports and reviewed monthly expenses.</li> <li>Set up the cost reporting system to isolate historical expenses and separate from current expenses</li> <li>Began entering projections for 2023 launch of the D-Amp and SRS projects.</li> </ul> </li> <li>Interviewer recruitment <ul style="list-style-type: none"> <li>Provided budget for recruitment</li> <li>Met with recruitment team to elaborate project needs, review results from 2020 recruitment and suggestions from</li> </ul> </li> </ul>		

the LCD team

- IRB – reviewed current IRB text and documents, provided a list of needed updates to the LCD team.
- Procurement
  - o Reviewed conference center bids for May 2023 training. Selected training site.
  - o Finalized kitting specification for D-Amp and SRS and submitted to procurement. Responded to vendor questions.
  - o Assembled procurement list for supplies for both projects.
- ? Checked current inventory
- ? Tested equipment left from 2019 start up, plus donated equipment from other projects
- ? Called vendors to determine pricing and availability
- Technical systems
  - o Met with technical lead to elaborate systems development needs and preliminary schedule, staffing
  - o Began writing Blaise specification for consent sequence for both projects.
  - o Reviewed and revised combined screener specification.
  - o Reviewed combined questionnaire changes
- Training preparation
- o Reviewed and revised study specific training agenda

Task 2: Sampling

- Reviewed screener specification, provided feedback.

Task 3: Questionnaire Development

- See Task 1 for activities completed by the management team

Task 4: CAI Programming

- No activity this month

Task 5: Systems Programming

- No activity this month

Tasks 6, 7: Interviewer Recruitment & Hiring, Training

- Facilities
  - o Contacted conference centers to encourage bids, discuss space availability
  - o Assembled cost information from bids, presented to project management team
  - o Began contract negotiations for May 2023 training space
  - o Drafted RFP for July training space.
- Interviewer recruitment
  - o Drafted on-staffer postings for interviewer, team leader, production coordinator
  - o Drafted new-hires postings for interviewer
  - o Assembled team, met with the Survey Director to discuss staffing requirements, schedule

Task 8: Main Data Collection

- See Task 1 for procurement activities
- Processed invoice for dynamometers (grip strength devices, Social Relations)

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

<b>Special Issues</b>	--The project is currently very understaffed, and the timeline for launch is *very* short. We are working with Admin to finalize staffing. --The PIs 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 PIs indicated that there would be a number of questionnaire changes, which were not anticipated in the budget.	
<b>Cost as of Feb 15, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>	1,027,036.73
	<b>Est Cost at Completion (E\$AC):</b>	3,758,091.43
	<b>Total Budget:</b>	3,758,127.00
	<b>Variance (Total Budget minus- E\$AC):</b>	35.57
	<b>Reason for Variance:</b>	The variance is insignificant.
<b>Projections as of Feb 15, 2023</b>	<b>Dollars Projected for Month:</b>	18,922.44
	<b>Actual Dollars Used:</b>	14,634.37
	<b>Variance (Projected minus Actual):</b>	4,288.07
	<b>Reason for Variance:</b>	The project is understaffed. We are working to finalize projections to reflect current staffing.

Measures	Units at Complete	RR	HPI
<b>Current Goal:</b>	930	varies	11.65 w/screen, inf
<b>Goal at Completion:</b>	930		
<b>Current Actual:</b>			
<b>Estimate at Complete:</b>	930		
<b>Variance:</b>			
<b>Other Measures</b>	.75 hour per completed screener (.45 hour per sample line), 60% cooperation rate with screening 7.5 hours per completed main interview 1 hour per completed informant 80% cooperation on saliva		

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	Jan, 2023 (HRS 2022 Panel & Baselines)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Throughout the month of January, - The project team has been working on production monitoring, logging, weekly mailings (SSA and SAQ), payment and letter request processing.		

- Technical development continued with SurveyTrak, Weblog, WebTrak, MSMS, and reports.
- Limited effort protocol continues with minimal impact to the field staff (435 SIDs pulled from field as of 2/17/23).
- Recruiting started for a late April training - aiming to train 127 interviewers.
- Web panel CATI follow up in process

\*As of 2/14/23, the measures in table reflect both Panel and Baseline interviews combined.

<b>Special Issues</b>	<ul style="list-style-type: none"> <li>- 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 iws. Project team is working with client on responsive design options to implement to help alleviate this concern.</li> <li>- Multiple Blaise issues that have impacted STrak and MSMS throughout data collection.</li> </ul>	
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<b>Cost as of Feb 07, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>	13,017,521.27
	<b>Est Cost at Completion (E\$AC):</b>	19,117,665.34
	<b>Total Budget:</b>	19,016,630.00
	<b>Variance (Total Budget minus- E\$AC):</b>	-101,035.34

**Reason for Variance:** CRS is projecting the contingent fringe benefits with the newly approved 10.4% rate to accommodate ACA costs, the \$400 signing bonus for field staff, Field interviewer and SurveyTech base rate increase, an extra day added to February production training, the increase in per mile reimbursement for travel. CRS is now using the actual lwer rates for projecting lwer costs and travel projections were removed from the recruitment task. The Casic recharge rate and Field Ops rate increases, increased mileage costs for remaining interviews, the Field lwer and SurveyTech rate increases have been updated in CRS, the increase in recharges to the lwer-Trainee hours as well as the reduction in the CAPI rat. The additional interviewer hours needed to reach panel goal have been applied to CRS. The decrease in variance since last month is due to staff hour (primarily professional staff hours) projections falling below projections by 6%.

<b>Projections as of Feb 07, 2023</b>	<b>Dollars Projected for Month:</b>	755,258.55
	<b>Actual Dollars Used:</b>	739,011.13
	<b>Variance (Projected minus Actual):</b>	16,247.42

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

Measures		Units at Complete	RR	HPI
	<b>Current Goal:</b>	12,069	48%	8.5
	<b>Goal at Completion:</b>	22,640	62%	8.2
	<b>Current Actual:</b>	12,272	48.8%	9.4
	<b>Estimate at Complete:</b>	22,640	62%	11.7
	<b>Variance:</b>	0	0	3.5

<b>Other Measures</b>	Panel: Goal RR: 74%, Current RR: 53.2% 2022 Baselines generated from screener: Goal RR: 44%, Current RR: 18.4% 2019 EGenX baselines: Goal RR: 60%, Current RR: 53.9%
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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:</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			
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		
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Report Period	Jan, 2023 (HRS HOC)		Planning
Risk Level	On Track		
Monthly Updates	During the month of January, - Stan continued crosswalk work based on meetings with the client with aim to complete this work prior to his February retirement. - Jeannie participated in meetings with the PI, Stan and budget analyst. - Stan began to transition his knowledge to the new coding lead, Carolyn Vieira-Martinez.		
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 Feb 15, 2023	Total Cost to Date (direct + indirect):		13,505.94
	Est Cost at Completion (E\$AC):		84,466.66
	Total Budget:		92,157.06
	Variance (Total Budget minus- E\$AC):		7,690.40
	Reason for Variance: Variance is due salary as a result of moving Stan Hasper's hours to		

Projections as of Feb 15, 2023	<b>Dollars Projected for Month:</b>	4,649.77
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	<b>Actual Dollars Used:</b>	1,979.89
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	<b>Variance (Projected minus Actual):</b>	2,669.88
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<b>Reason for Variance:</b>	Variance is due to staff hours; not as much project management was needed in January as originally projected due to additional crosswalk work needed and a delay to when the re-coding work projected to begin. Projections have been updated
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Measures		Units at Complete	RR	HPI
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			

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	<b>Project Lead:</b> Evanthia Leissou <b>Budget Analyst:</b> Richard Warren Krause <b>Production Manager:</b> <b>Senior Project Advisor:</b> Nicole G Kirgis <b>Production Manager 1:</b> Andrew L Hupp <b>Production Manager 2:</b> 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> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> 04/19/2022 </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </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		
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Report Period	Jan, 2023 (HRS2022-Screening)		Implementing
Risk Level	Some Concerns		
Monthly Updates	<p>Release 4 happened on 1/9. A reminder mailing (with paper questionnaire occurred on 1/23. Due to IRB timing the final postcard reminder we had planned on sending was not sent. This is fine, as it mimics the contact strategy for Release 3. Currently ~7% of cases completed a screener during the web protocol (web/paper/phone). Another ~400 cases were finalized (a large share from undeliverable (vacant HHs) invitations from the USPS. We haven't decided when, or how large, release 5 will be.</p> <p>Cases continue to be flagged for the follow-up protocol. The 12-week mark for releases 2 and 3 has occurred. This is the time point at which the remaining cases that haven't been eligible for the follow-up protocol due to effort (10+ attempts), or other reasons (resistance, safety, locked, etc.). The release 2 cases will be worked until the end of January (their 24-week mark). New cases are pulled each Monday and are reviewed and placed into their follow-up protocol days later.</p> <p>Interviewing focus has shifted to the panel. Screening sample has been consolidated with a subset of interviewers and is being overseen by Theresa and Millie (the TL's are also focusing on panel). Interviewers are to be working</p>		



two call windows per week. Those working have been meeting the lowered goals.

Training (February) of 30 screening-only interviewers (29 new hires) just concluded. They will begin screening work this coming week. 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.

<b>Special Issues</b>		
<b>Cost as of Feb 10, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>	8,355,407.90
	<b>Est Cost at Completion (E\$AC):</b>	29,023,389.34
	<b>Total Budget:</b>	28,919,242.00
	<b>Variance (Total Budget minus- E\$AC):</b>	104,147.34
	<b>Reason for Variance:</b>	Project staff is aware of the current projected overrun.
<b>Projections as of Feb 10, 2023</b>	<b>Dollars Projected for Month:</b>	974,007.46
	<b>Actual Dollars Used:</b>	761,198.95
	<b>Variance (Projected minus Actual):</b>	212,801.51
	<b>Reason for Variance:</b>	The largest contributors to the variance were spending less in recruitment advertising, unused respondent payments, overall hours (~2,000) and no DataForce invoice.

Measures		Units at Complete	RR	HPI
	<b>Current Goal:</b>	3,600/1,500 HHs	73%	3.0
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>	1,116/1,046	24.0%	4.67
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			

**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)		
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Report Period	Jan, 2023 (IHDS3)		Implementing

<b>Risk Level</b>	Some Concerns			
<b>Monthly Updates</b>	<p>January was a slow month for IHDS3 for Programmers.</p> <p>A lot of new inexperienced lwer added to this project so we typically have about 5 data model resets per week. I will be creating a routine for NCAER to run certain types of resets.</p> <p>We continue to have ST errors either launching, or finalizing lines, but still in very small numbers that seem to indicate laptop issues rather than programming issues.</p> <p>Client has informed us that they will be looking for additional funding to extend the project until November 2023. Rolfe is working on a budget and we are hoping to cover the overrun with this extension.</p>			
<b>Special Issues</b>				
<b>Cost as of Feb 15, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>			534,345.86
	<b>Est Cost at Completion (E\$AC):</b>			577,139.01
	<b>Total Budget:</b>			559,884.53
	<b>Variance (Total Budget minus- E\$AC):</b>			-17,254.48
	<b>Reason for Variance:</b>	Nothing new here, the balance kept growing due to the scope of translation work. We have moved most of this work to be done by the client team rather than SRO. We are hoping this balance will not keep growing.		
<b>Projections as of Feb 15, 2023</b>	<b>Dollars Projected for Month:</b>			15,440.09
	<b>Actual Dollars Used:</b>			11,801.70
	<b>Variance (Projected minus Actual):</b>			3,638.39
	<b>Reason for Variance:</b>	NCAER delayed releasing new translation work and changed to the migrant data model, hence not many programmer hours were used that were planned for those tasks.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
<b>Other Measures</b>				

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	<b>Project Lead:</b> Sarah Elisa Broumand <b>Budget Analyst:</b> William Lokers <b>Production Manager:</b> Ruth B Philippou <b>Senior Project Advisor:</b> Nicole G Kirgis <b>Production Manager 1:</b> <b>Production Manager 2:</b>		
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> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b> 11/29/2021   <b>DC Start:</b> 01/26/2022 </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b> 09/16/2021   <b>GIT Start:</b>   <b>SS Train End:</b> 12/02/2021   <b>DC End:</b> 07/07/2023 </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		
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Report Period	Jan, 2023 (MI CReSS (Year 3))		Implementing
Risk Level	On Track		
Monthly Updates	Sample replicate 12 was released as planned. Working with client to enhance the protocol and add additional communications with remaining respondents to help		

the Response Rate goal. Preparing for the loss of 2 Iwers and stated the process to hire two additional interviewers.

Discovered that some TL's have been charging all their time as IwerSupport instead of allocating the time they were on the phones to Interviewing. This has skewed some of our HPI computations. So as it stands it is higher than 4.65.

We have also received notification that the addition of 2 more releases has been funded. This will bring in over \$200K more to our FY23 budget.

#### Special Issues

<b>Cost as of Feb 15, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>	175,389.85
	<b>Est Cost at Completion (E\$AC):</b>	391,901.06
	<b>Total Budget:</b>	390,364.00
	<b>Variance (Total Budget minus- E\$AC):</b>	-1,537.06
	<b>Reason for Variance:</b>	An additional \$1,500 was approved by PI for adding additional question in January. The overrun is due to these hours being added to the projections.

<b>Projections as of Feb 15, 2023</b>	<b>Dollars Projected for Month:</b>	44,473.97
	<b>Actual Dollars Used:</b>	42,526.36
	<b>Variance (Projected minus Actual):</b>	1,947.61
	<b>Reason for Variance:</b>	There were a few indirect costs that did not get applied this month. This has been moved to the next month.

Measures		Units at Complete	RR	HPI
	<b>Current Goal:</b>	3,779 (Rel 1-12)	80% (60%-Web/40%Tel)	2.25
	<b>Goal at Completion:</b>		80% (60%-Web/40%Tel)	
	<b>Current Actual:</b>	2,894	71% (67%-Web/33% Tel)	4.65
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			

#### Other Measures

<b>Project Name</b>	<b>(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027</b>		
<b>Project Mode</b>	Primary: Class SAQ      Total of Modes: 1		
<b>Project Type</b>	Sponsored Projects		
<b>Budget</b>	<b>Direct Budget:</b> 6,267,988.00	<b>Indirect Budget:</b> 3,510,072.00	<b>Total Budget:</b> 9,778,060.00
<b>Principal</b>	Richard Miech (SRC)		
<b>Investigator/Clients</b>			
<b>Funding Agency</b>	National Institute on Drug Abuse, one of the National Institutes of Health.		
<b>IRB</b>	<b>HUM#:</b> 00217920	<b>Period of Approval:</b> from 7/20/22 No CR	
<b>Project Team</b>	<b>Project Lead:</b> Rebecca Gatward <b>Budget Analyst:</b> Dean E Stevens <b>Production Manager:</b> Margaret Lavanger <b>Senior Project Advisor:</b> Gregg Peterson <b>Production Manager 1:</b> James Koopman <b>Production Manager 2:</b>		
<b>Proposal #</b>	no data		
<b>Description</b>	<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.. <a href="http://www.monitoringthefuture.org/">http://www.monitoringthefuture.org/</a></p>		
<b>SRO Project Period</b>	04/2022 - 03/2027		
<b>Data Col Period</b>	04/2022 - 03/2027		
<b>Security Plan</b>	Yes		
<b>Milestones</b>	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div style="width: 45%;"> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
<b>Other Project Team Members</b>	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		
<b>Other Project Name</b>			
<b>Sample Mgmt System</b>	SurveyTrak; Web SMS; Illume		
<b>Data Col Tool</b>	Illume		
<b>Hardware</b>	Laptop; Tablet; [UM cell] Phone		
<b>DE Software</b>	Illume		
<b>QC Recording Tool</b>	N/A		
<b>Incentive</b>	Yes, Other (Honorarium paid to school by MTF Research staff)		
<b>Administration</b>	ISR Group		
<b>Payment Type</b>	NA		
<b>Payment Method</b>	Check through other system		
<hr/>			
<b>Report Period</b>	Jan, 2023 (MTF Base Year 2022_27)		Implementing
<b>Risk Level</b>	On Track		
<b>Monthly Updates</b>	January 2023 - MTF Study Proctors (interviewers) were trained during three half day sessions (each session was conducted twice to cover all interviewers). Proctors completed certification by 1/26 and any available schools were released to		

them.  
- final technical system updates made for the beginning of production.

<b>Special Issues</b>		
<b>Cost as of Feb 15, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>	903,605.28
	<b>Est Cost at Completion (E\$AC):</b>	8,760,935.21
	<b>Total Budget:</b>	9,778,060.00
	<b>Variance (Total Budget minus- E\$AC):</b>	1,017,124.79
	<b>Reason for Variance:</b>	<p>Current projections result in an underspend of \$1,017,124.79 for the five year grant period. A client report (with notes) is provided to Nicholas Prieur every month so they are aware on projected cost to complete. The projected underspend has increased since last month due to lower interviewer rates (for IWERS actually assigned to MTF) than the rates used for projections. The number of schools recruited that could potentially be passed to SRO is ~225 - 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. The MTF recruiters have been on a few trips to try FTF school recruitment. An interviewer will join the next trip. SRO interviewers involvement in FTF recruitment may be requested for 2024.</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>

<b>Projections as of Feb 15, 2023</b>	<b>Dollars Projected for Month:</b>	146,829.40
	<b>Actual Dollars Used:</b>	83,890.22
	<b>Variance (Projected minus Actual):</b>	62,939.18
	<b>Reason for Variance:</b>	Variance - Not as many recruited schools were passed to SRO in early January as forecast so interviewer hours required to start contacting and scheduling survey dates were lower than projected.

Measures		Units at Complete	RR	HPI
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			

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	<p>This project is a continuation of MTF Illume Web 2021.</p> <p>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.</p>		
SRO Project Period	01/2022 - 03/2027		
Data Col Period	04/2022 - 10/2026		
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	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		
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Report Period	Jan, 2023 (MTF Panel 2022-27)		Implementing
Risk Level	On Track		
Monthly Updates	1. Management - MTF staff finished editing the survey and will delivery to SRO for testing next month. - Working with MTF staff to prepare the 2023 data collection  2. System - Putting final touches on the refinement of the RLM system. - Working with ICPSR and MTF Staff to continue development of the Respondent Portal to update their information and view Newsletters - Preparing Web SMS for 2023 testing and production - Working with MTF staff to update email templates - Mount a 2023 Sample management system Site  3. Data Collection - N/A		



Special Issues

Cost as of Jan 31, 2023	Total Cost to Date (direct + indirect):	605,154.18
	Est Cost at Completion (E\$AC):	3,889,130.56
	Total Budget:	3,895,217.00
	Variance (Total Budget minus- E\$AC):	6,086.44
	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 Jan 31, 2023	Dollars Projected for Month:	51,620.38
	Actual Dollars Used:	44,960.02
	Variance (Projected minus Actual):	6,660.36
	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	SRO will work with the PIs and a local survey firm in Puerto Rico, Estudios Técnicos (ETI), to develop a sample frame, sample design, questionnaire and data collection protocols for both pilot data collection (in 2022) and baseline data collection (in 2023). DMSS will provide assistance with sample design and implementation, responsive design, panel maintenance issues, and creation of sample weights. SRO will update the PSID-21 Spanish instrument for use specifically in PR. SRO will assist with the preparation of training materials for Listing training, Pretest and Main Data collection and will travel to PR to be on-site for these trainings. SRO will define reports for production and quality control monitoring that will be programmed through the SurveyTrak system, and train the research team on using these reports. All data will be collected by ETI's interviewers in PR and will be encrypted and transmitted daily via SurveyTrak to a secure SRC server. SRO will also assist with data processing.		
SRO Project Period	01/2022 - 12/2023		
Data Col Period			
Security Plan	NA		
Milestones	Pre Production Start: 10/01/2021 Pretest End: Staffing Complete: SS Train Start: DC Start: Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 12/31/2023		
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	Jan, 2023 (PR-PSID)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Updated status to yellow because of concerns that pretest may be delayed due to ETI and translation contract delays. U-M PI is well informed of this risk.  Listing: --As of 1/31, 533 of 701 blocks had been completed. Work now projected to continue through mid-March. --Students were not able to resume work after the holidays until January 20th due to delays finalizing the paperwork needed to insure and pay the students. --SRO working with PR PIs on Listing and Field Maps QC and data cleanup. --DMSS worked to create a new separate map for the largest block that was subselected, while PR worked on preload list preparation. --PR PIs working to gain access to gated communities and checking with police about status of PSU with gang activity and whether listers can safely enter that area.		

Main Data Collection:

- PI and PSID staff continued working on setting up ETI's Purchase Order and the procurement contract with the translation company. Procurement required PIs to put out ETI's contract out to bid. ETI were the only bidders on the data collection contract -- procurement evaluating their bid.
- Questionnaire modifications based on Cognitive Interview results forthcoming.
- Developed rough key dates timeline for programming and tech development.
- PIs informed SRO that they may reapply for NIA funding.
- Recruiting bilingual Spanish resource to help with testing and basic project management support -- posting went up on 1/16.
- Scheduled Project Kick-Off Meeting for Feb 21

<b>Special Issues</b>	Contracts with ETI and translation firm have not yet been established.			
<b>Cost as of Feb 15, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>	208,834.01		
	<b>Est Cost at Completion (E\$AC):</b>	1,290,649.59		
	<b>Total Budget:</b>	1,292,585.00		
	<b>Variance (Total Budget minus- E\$AC):</b>	1,935.41		
	<b>Reason for Variance:</b>	Added hours for Research Area Specialist Intermediate and Leads -- caused slight decrease in overall underrun.		
<b>Projections as of Feb 15, 2023</b>	<b>Dollars Projected for Month:</b>	25,840.92		
	<b>Actual Dollars Used:</b>	15,025.86		
	<b>Variance (Projected minus Actual):</b>	10,815.06		
	<b>Reason for Variance:</b>	Monthly underrun due to lower actuals in salary tech categories -- main data collection programming has not yet begun as projected.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
<b>Other Measures</b>				

<b>Project Name</b>	<b>(PSID CDS 2023) PSID Childhood Development Supplement 2023</b>		
<b>Project Mode</b>	Primary: Mixed	Secondary: Face to Face	Total of Modes: 4
<b>Project Type</b>	Sponsored Projects		
<b>Budget</b>	<b>Direct Budget:</b> 0.10	<b>Indirect Budget:</b> 0.10	<b>Total Budget:</b> 0.20
<b>Principal</b>	Narayan Sastry (SRC)		
<b>Investigator/Clients</b>			
<b>Funding Agency</b>			
<b>IRB</b>	<b>HUM#:</b> HUM00166316	<b>Period of Approval:</b>	
<b>Project Team</b>	<b>Project Lead:</b> Piotr Dworak		
	<b>Budget Analyst:</b> Ivanna Iavorska-Em		
	<b>Production Manager:</b> Sarah Crane		
	<b>Senior Project Advisor:</b> Stephanie A Chardoul		
	<b>Production Manager 1:</b>		
	<b>Production Manager 2:</b>		
<b>Proposal #</b>	no data		
<b>Description</b>	<p>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.</p>		
<b>SRO Project Period</b>	08/2022 - 01/2025		
<b>Data Col Period</b>	09/2023 - 01/2025		
<b>Security Plan</b>	NA		
<b>Milestones</b>	<div> <div> <b>Pre Production Start:</b> 10/01/2022  <b>Pretest End:</b> 05/14/2023  <b>Staffing Complete:</b> 08/01/2023  <b>SS Train Start:</b> 09/07/2023  <b>DC Start:</b> 09/14/2023 </div> <div> <b>Pretest Start:</b> 04/24/2023  <b>Recruitment Start:</b> 07/01/2023  <b>GIT Start:</b> 09/05/2023  <b>SS Train End:</b> 09/12/2023  <b>DC End:</b> 01/01/2025 </div> </div>		
<b>Other Project Team Members</b>			
<b>Other Project Name</b>			
<b>Sample Mgmt System</b>	SurveyTrak; MSMS; Other (WSMS)		
<b>Data Col Tool</b>	Blaise 4.8; Blaise 5; Other (IVR)		
<b>Hardware</b>	Laptop; Desktop; [UM cell] Phone; Paper and Pencil		
<b>DE Software</b>	Other (Time Diary Coding)		
<b>QC Recording Tool</b>	DRI-CARI; Camtasia		
<b>Incentive</b>	Yes, R; Yes, INF; Yes, Other (PCG)		
<b>Administration</b>	SRO Group		
<b>Payment Type</b>	Check, post (75 + interventions); Other (ePay)		
<b>Payment Method</b>	Check through other system (PSID RAPS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (PSID RAPS)		
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<b>Report Period</b>	Jan, 2023 (PSID CDS 2023)		Initiation
<b>Risk Level</b>	Some Concerns		
<b>Monthly Updates</b>	<p>CDS 2023 has not yet received the 2023 - 2025 funding from NIH.</p> <p>PIs asked us to continue development and preparations for the study pilot. Technical development is ongoing, however, the dates for the pretest data collection are still to be determined.</p> <p>In the current scenario, if the funding is awarded in by mid/end-of March, we will be conducting the pretest starting with sample generation in mid/late May and pretest data collection in June.</p> <p>Funding contingencies 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</p>		

interview followed by a web-phone interviews with adolescents 12-17. Phase 1 will also include a transfer from 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.

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

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

Current activities:

Blaise programming:

- B5 Child programmed and being tested
- B4.8 PCG programmed and being tested
- B4.8 CS programmed and being tested

SurveyTrak programming:

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

MSMS Programming:

- Implementation of the initial bare-bones project has been delayed but we are working to get back on track.
- Goal to have the first INT project by the end of February.

New IVR system: Enghouse / Survox has been evaluated by Gregg / Piotr, sent response to some questions and adjusted quote based on the review of the survey spec. Enghouse has provided a quote for reduced-scope pretest programming and we await PI decision to start programming.

<b>Special Issues</b>		<p>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.</p> <p>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.</p>		
<b>Cost as of</b>	<b>Total Cost to Date (direct + indirect):</b>			0.00
	<b>Est Cost at Completion (E\$AC):</b>			0.00
	<b>Total Budget:</b>			0.20
	<b>Variance (Total Budget minus- E\$AC):</b>			0.00
	<b>Reason for Variance:</b>	CDS is under contingency funding awaiting funding decision from NIH. We projected \$236K but spent \$195K through January 2023.		
<b>Projections as of</b>	<b>Dollars Projected for Month:</b>			0.00
	<b>Actual Dollars Used:</b>			0.00
	<b>Variance (Projected minus Actual):</b>			0.00
	<b>Reason for Variance:</b>	In January, we projected spending \$59K but spent \$42K.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>	tbd	tbd	tbd
	<b>Goal at Completion:</b>	tbd	tbd	tbd
	<b>Current Actual:</b>	tbd	tbd	tbd
	<b>Estimate at Complete:</b>	tbd	tbd	tbd
	<b>Variance:</b>	tbd	tbd	tbd
<b>Other Measures</b>				

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	<b>Project Lead:</b> Camila Kendall <b>Budget Analyst:</b> Ivanna Iavorska-Em <b>Production Manager:</b> <b>Senior Project Advisor:</b> Stephanie A Chardoul <b>Production Manager 1:</b> <b>Production Manager 2:</b>		
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 send the respondents one email reminder with an authenticated link. This project is under the PSID Core IRB.		
SRO Project Period	04/2022 - 12/2022		
Data Col Period	06/2022 - 12/2022		
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b> 04/01/2022   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> 07/01/2022 </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> 11/30/2022 </div> </div>		
Other Project Team Members	Rachel Orlowski -- PSID Core Lead Karl Dinkelmann -- TSG Lead and Blaise Programming Support Marsha Skoman -- Blaise Programmer Daric Thorne -- MSMS Spec Lead Kyle Goodman -- MSMS Set up Programmer Jim Rodgers -- MSMS Lead Rose Zybel -- Data Manager		
Other Project Name			
Sample Mgmt System	MSMS		
Data Col Tool	Blaise 5		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	ISR Group (PSID)		
Payment Type	Check, post (\$10); Other (electronic, post--JP Morgan)		
Payment Method	Check through other system (PSID staff will handle check & e-payment via RAPS)		
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Report Period	Jan, 2023 (PSID23 Online Contact Update)		Closing
Risk Level	On Track		
Monthly Updates	Project ended data collection on 12/15. No project activity took place in January. Debriefing meeting with PSID postponed until February.		
Special Issues			
Cost as of Feb 16, 2022	<b>Total Cost to Date (direct + indirect):</b>		45,741.38
	<b>Est Cost at Completion (E\$AC):</b>		46,889.15
	<b>Total Budget:</b>		47,456.00

<b>Variance (Total Budget minus- E\$AC):</b>		566.85		
<b>Reason for Variance:</b>		Minimal change in overall underrun -- increased by \$44		
<b>Projections as of Feb 16, 2022</b>	<b>Dollars Projected for Month:</b>	246.80		
<b>Actual Dollars Used:</b>		273.11		
<b>Variance (Projected minus Actual):</b>		-26.31		
<b>Reason for Variance:</b>		Minimal variance		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
<b>Other Measures</b>				

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: 03/06/2023  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	Jan, 2023 (PSID23)	Implementing		
Risk Level	Some Concerns			
Monthly Updates	<p>Summary of January 2023 Activities</p> <p>Training: On 1/10, Pls approved revised T2 plan: Train ~60 new hires and ~12 remaining on-staffers in early June at Novi Sheraton. GIT/TTT: 6/5-6/6. Study-specific: 6/7-6/11. Continued training material development and training sample creation. Worked w/ DCS to plan new hire recruitment.</p> <p>Technical development: On-boarded DMSS statistician. Determined sample release assignment. Began programming interviewer assignment logic. On 1/10, Pls approved details of the Roadrunner experiment: 1200 English Web Release 4 Reinterview cases would have a 7/31 end date, known to them at launch. On 1/16, PSID signed off on training data model. On 1/17, moved PSID Core 2023 from Blaise Server Set B to A. On 1/24, PSID signed off on production data model 1 (English CATI and web). Continued Spanish Blaise CATI testing and fixes. Spanish web specs were not delivered in January, as scheduled. TSG updated the DCA and DIM to resolve system-wide Blaise upload/download errors--tested new DIM but new DCA not yet released. Updated Blaise watch window. Set up production INT2 project for testing DCA interface and rules. Increased testing effort with training sign off on 2/13. Duplicated INT2 project for Prod Data Test, which began on 1/31. Spent more time than anticipated programming and testing email and text templates that incorporated MSMS core NAPE improvements. Continued work on Team Locating within the 68ID Site. Awaited updated self scheduler for testing.</p> <p>Saliva: On 1/17, presented updated saliva rebudget to Pls and received verbal confirmation. On-boarded new PDMG SSA. Determined exact materials for saliva kit mailings. Outlined schedule for assembly, mailing, logging, and non-response remote follow-up.</p> <p>Management: On 1/18, started weekly production meetings with PDMG and DCO managers and support staff. Produced first PSID Core 2023 overrun/underrun report to highlight to the Pls the major cost deviations from the budget; will produce monthly going forward.</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 Feb 21, 2023	Total Cost to Date (direct + indirect):	623,333.15		
	Est Cost at Completion (E\$AC):	5,217,765.40		
	Total Budget:	5,030,748.00		
	Variance (Total Budget minus- E\$AC):	-187,017.40		
	Reason for Variance:	Primarily driven by assigned vs. budgeted resources due to staff departures; adding TL involvement in pre-production; increasing the Survey Tech, Iwer II, and Iwer III rates; increasing programmer hours; merit increase above 3%; and recruiting/hiring/training more interviewers (including more new hires) than budgeted. Pls 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 Feb 21, 2023	Dollars Projected for Month:	217,043.12		
	Actual Dollars Used:	150,789.69		
	Variance (Projected minus Actual):	66,253.43		
	Reason for Variance:	MSMS specification and development work was split between the interview and saliva efforts, so some time projected under the interview budget hit the saliva budget. On-boarding new DMSS staff delayed reporting work. 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 is behind schedule, so Iwer and PDMG SSA help has been delayed. Note: Unable to separate Core IDC costs from Contact Update IDC costs. Cost values only reflect Direct Costs.		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures	BUDGET ASSUMPTIONS: Mode of completion: 60% web & 40% CATI; Of the web completes, 38% do not require any interviewer effort. HPI: 5.42 = CATI completes; 7.21 = web completes w/ interviewer follow-up; 10.17 = non-sample/non-iw. Additional 1.74 HPI for FTF NRFU cases.			

Project Name	(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		
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Report Period	Jan, 2023 (QoL & Hearing Loss)		Planning
Risk Level	On Track		
Monthly Updates	A draft questionnaire was presented to the research team in late December for January review and feedback. Proposed a January meeting with research team however they were unable to meet. Looking at a February meeting to review questionnaire and plan data collection in March. Also in February Lisa V and Margaret will develop the cognitive interviewing guide and continue preparation for March data collection.		
Special Issues	Research team is busy / hard to schedule times to meet. Working at their pace, while trying to keep things progressing.		
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

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Project Name	(SCA 2023) Surveys of Consumer Attitudes		
Project Mode	Primary: Telephone	Total of Modes: 1	
Project Type	Sponsored Projects		
Budget	Direct Budget: 1,332,352.00	Indirect Budget: 0.00	Total Budget: 1,332,352.00
Principal	Joanne Hsu (SCA)		
Investigator/Clients	Tuba Suzer-Gurtekin (SCA)		
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Theresa Camelo		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lisa J Carn		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations.</p> <p>The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 600 interviews.</p>		
SRO Project Period	01/2023 - 12/2023		
Data Col Period	12/2022 - 12/2023		
Security Plan	NA		
Milestones	<div><div>Pre Production Start:  Pretest End:  Staffing Complete:  SS Train Start:  DC Start: 12/27/2022</div><div>Pretest Start:  Recruitment Start:  GIT Start:  SS Train End:  DC End: 12/20/2023</div></div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; Desktop; [UM cell] Phone		
DE Software	NA		
QC Recording Tool	DRI-CXM		
Incentive	Not used		
Administration	N/A		
Payment Type	N/A		
Payment Method	N/A		
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Report Period	Jan, 2023 (SCA 2023)		Initiation
Risk Level	On Track		
Monthly Updates	SCA JAN began as scheduled on TUES 12/27/22 and ended as scheduled on MON 1/23/2023. We completed 600 IWs (320/180/100) at a cumulative HPI of 3,16 (.16 above the budgeted 3.0). A new and nearly 6 minute long rider, as well as a slower than usual first week of production due the end of year holidays weer the primary contirbutors to the higher than budgetert hpi.		
Special Issues			
Cost as of Feb 15, 2023	Total Cost to Date (direct + indirect):		97,619.30
	Est Cost at Completion (E\$AC):		1,303,309.25
	Total Budget:		1,332,352.00
	Variance (Total Budget minus- E\$AC):		29,042.75
	Reason for Variance:	A more in depth evaluation of the annual budget will be completed by the end of FEB	

Projections as of Feb 15, 2023		Dollars Projected for Month:		77,471.91
		Actual Dollars Used:		91,146.19
		Variance (Projected minus Actual):		-13,674.28
		Reason for Variance:		Permanent staff vacations during the end of year holidays was the primary contributor to the projected underrun for .the month
Measures		Units at Complete	RR	HPI
	Current Goal:	600		3.0
	Goal at Completion:	600		3.16
	Current Actual:	600		3.16
	Estimate at Complete:	600		3.16
	Variance:	0		,16
Other Measures	A new 6 minutes rider, as well as a slower than usual first week of production were the primary contributors to the higher than budgeted hpi.			

<b>Project Name</b>	<b>(SRS 2021) Social Relations 2023</b>		
<b>Project Mode</b>	Primary: Face to Face      Total of Modes: 1		
<b>Project Type</b>	Sponsored Projects		
<b>Budget</b>	<b>Direct Budget:</b> 3,767,057.11	<b>Indirect Budget:</b> 2,109,553.00	<b>Total Budget:</b> 5,876,610.11
<b>Principal</b>	Toni Antonucci (ISR)		
<b>Investigator/Clients</b>	Kristine Ajrouch (ISR)		
	Laura Zahodne (ISR)		
<b>Funding Agency</b>	NIH		
<b>IRB</b>	<b>HUM#:</b>	<b>Period of Approval:</b>	
<b>Project Team</b>	<b>Project Lead:</b> Barbara Lohr Ward		
	<b>Budget Analyst:</b> Christine Evanchek		
	<b>Production Manager:</b> Veronica Connors-Burge		
	<b>Senior Project Advisor:</b> Nicole G Kirgis		
	<b>Production Manager 1:</b> Tagh Reid Lovell		
	<b>Production Manager 2:</b> Ian Ogden		
<b>Proposal #</b>	no data		
<b>Description</b>	Conduct 3400 interviews with respondents aged 35 years or older residing in the tri-county area of Southeast Michigan (Wayne, Oakland and Macomb counties) and 244 interviews with Social Relations sample members aged younger than 65 years of age. The project involves screening up to 6900 new sample lines., with one selected respondent per household. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements (height, weight, blood pressure, grip strength) and saliva collection. The SRS 2023 project will use the same instrument programmed for the D-Amp project, with the only new programming being that for a screener. The screener will be translated into Arabic. No informant or proxy interview is included in the project scope. Interviews will be conducted in English or Arabic.		
<b>SRO Project Period</b>	09/2021 - 05/2023		
<b>Data Col Period</b>	05/2023 - 04/2024		
<b>Security Plan</b>	NA		
<b>Milestones</b>	<div> <div> <b>Pre Production Start:</b> 09/01/2022   <b>Pretest End:</b>   <b>Staffing Complete:</b> 04/10/2023   <b>SS Train Start:</b> 05/18/2023   <b>DC Start:</b> 05/30/2023 </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b> 02/01/2023   <b>GIT Start:</b> 05/16/2023   <b>SS Train End:</b> 05/25/2023   <b>DC End:</b> 04/30/2023 </div> </div>		
<b>Other Project Team Members</b>	Ian Ogden, Mathew Luna, Veronica Connors-Burge, Tagh Reid Lovell, Jeff Smith (Tech Lead), others TBD		
<b>Other Project Name</b>	Social Relations 2022, DAWN, Social Relations 2023		
<b>Sample Mgmt System</b>	SurveyTrak		
<b>Data Col Tool</b>	Blaise 4.8		
<b>Hardware</b>	Laptop; [UM cell] Phone; Paper and Pencil		
<b>DE Software</b>	Other (Weblog)		
<b>QC Recording Tool</b>	DRI-CARI		
<b>Incentive</b>	Yes, R		
<b>Administration</b>	SRO Group		
<b>Payment Type</b>	Cash, prepaid (\$70)		
<b>Payment Method</b>	Interviewer payment of cash (reimbursed/reconciled via Tenrox)		
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<b>Report Period</b>	Jan, 2023 (SRS 2021)		Planning
<b>Risk Level</b>	Attention!		
<b>Monthly Updates</b>	<p>During January 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"> <li>• Held meetings with the DAWN research team to discuss study funding. scope and schedule for D-Amp and SRS.</li> <li>• Began work to assemble a schedule for project launch</li> <li>• Financial <ul style="list-style-type: none"> <li>o Prepared cost reports and reviewed monthly expenses.</li> <li>o Set up the cost reporting system to isolate historical expenses and separate from current expenses</li> <li>o Began entering projections for 2023 launch of the D-Amp and SRS projects.</li> </ul> </li> <li>• Interviewer recruitment <ul style="list-style-type: none"> <li>o Provided budget for recruitment</li> <li>o Met with recruitment team to elaborate project needs, review results from 2020 recruitment and suggestions from the LCD team</li> </ul> </li> </ul>		

- IRB – reviewed current IRB text and documents, provided a list of needed updates to the LCD team.
  - Procurement
    - o Reviewed conference center bids for May 2023 training. Selected training site.
    - o Finalized kitting specification for D-Amp and SRS and submitted to procurement. Responded to vendor questions.
    - o Assembled procurement list for supplies for both projects.
  - ? Checked current inventory
  - ? Tested equipment left from 2019 start up, plus donated equipment from other projects
  - ? Called vendors to determine pricing and availability
  - Technical systems
    - o Met with technical lead to elaborate systems development needs and preliminary schedule, staffing
    - o Began writing Blaise specification for consent sequence for both projects.
    - o Reviewed and revised combined screener specification.
    - o Reviewed combined questionnaire changes
  - Training preparation
  - o Reviewed and revised study specific training agenda
- Task 2: Sampling
- Reviewed screener specification, provided feedback.
- Task 3: Questionnaire Development
- See Task 1 for activities completed by the management team
- Task 4: CAI Programming
- No activity this month
- Task 5: Systems Programming
- No activity this month
- Tasks 6, 7: Interviewer Recruitment & Hiring, Training
- Facilities
    - o Contacted conference centers to encourage bids, discuss space availability
    - o Assembled cost information from bids, presented to project management team
    - o Began contract negotiations for May 2023 training space
    - o Drafted RFP for July training space.
  - Interviewer recruitment
    - o Drafted on-staffer postings for interviewer, team leader, production coordinator
    - o Drafted new-hires postings for interviewer
    - o Assembled team, met with the Survey Director to discuss staffing requirements, schedule
- Task 8: Main Data Collection
- See Task 1 for procurement activities
  - Processed invoice for dynamometers (grip strength devices, Social Relations)
- 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

<b>Special Issues</b>	--The project is currently very understaffed, and the timeline for launch is *very* short. We are working with Admin to finalize staffing. --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.	
<b>Cost as of Feb 15, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>	73,580.48
	<b>Est Cost at Completion (E\$AC):</b>	5,859,435.81
	<b>Total Budget:</b>	5,876,610.11
	<b>Variance (Total Budget minus- E\$AC):</b>	17,174.30
	<b>Reason for Variance:</b>	We are working to enter the new budget and projections in CRS. The projections are being fine-tuned.
<b>Projections as of Feb 15, 2023</b>	<b>Dollars Projected for Month:</b>	50,737.23
	<b>Actual Dollars Used:</b>	25,519.68
	<b>Variance (Projected minus Actual):</b>	25,217.55
	<b>Reason for Variance:</b>	The project is understaffed. We are working to update projections to reflect actual staffing available for the project.

Measures	Units at Complete	RR	HPI
<b>Current Goal:</b>	3644	varies	10.38 w/screening
<b>Goal at Completion:</b>	3644		
<b>Current Actual:</b>			
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

**Other Measures**

1.0 screening HPI, 80% cooperation rate  
8.5 HPI main interview for new sample and SRS Panel  
Overall 10.38 HPI 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	<b>Project Lead:</b> Meredith A House <b>Budget Analyst:</b> William Lokers <b>Production Manager:</b> Ruth B Philippou <b>Senior Project Advisor:</b> Lisa S Holland <b>Production Manager 1:</b> Jeffrey Albrecht Jr <b>Production Manager 2:</b> 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> <b>Pre Production Start:</b> 04/01/2022  <b>Pretest End:</b>  <b>Staffing Complete:</b> 10/01/2022  <b>SS Train Start:</b> 11/14/2022  <b>DC Start:</b> 11/07/2022 </div> <div> <b>Pretest Start:</b>  <b>Recruitment Start:</b> 07/23/2022  <b>GIT Start:</b>  <b>SS Train End:</b> 11/17/2022  <b>DC End:</b> 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		

<b>Administration</b>	SRO Group
<b>Payment Type</b>	Check, post (\$50-\$100)
<b>Payment Method</b>	Check through other system (MSMS)
<hr/>	
<b>Report Period</b>	Jan, 2023 (STARRS-LS Waves 3 & 4)
<b>Risk Level</b>	Implementing
<b>Monthly Updates</b>	<p>On Track</p> <p>Project Management and Planning:</p> <ul style="list-style-type: none"> <li>? We sent weekly production updates to the Pls, and reported on progress on the call with the Army/M&amp;RA.</li> <li>? Meredith created the agenda/notes and facilitated the weekly meeting with the STARRS project managers.</li> <li>? We carried out bi-weekly meetings with M&amp;RA to coordinate Safety Plan and respondent locating activities.</li> <li>? James and Meredith participated in discussions with the Pls/Research Team about USUHSs plan to reduce Year 4 period of performance (POP) to 10 months (May 2023-Feb 2024) and adjust the Year 5 POP dates to March 2024-Feb 2025. This will allow the POPs to better align with fixed amount DOD fiscal year funding.</li> <li>? James and Meredith participated in discussions with the Pls/Research Team about scope of work and costs for STARRS plans beyond Wave 4</li> <li>? IRB: <ul style="list-style-type: none"> <li>o An amendment for minor updates to the study brochure (VA and USUHS logos, 988, study email address) and miscellaneous administrative updates was submitted to the U-M IRB on January 24.</li> </ul> </li> <li>? STARRS-affiliated, but not STARRS funded, work: <ul style="list-style-type: none"> <li>o We sent a memo describing the scope of work and a ballpark cost estimate for U-M SRO to obtain NDI data for the SHOS-B cases for the Firearms Study to Catherine Dempsey on February 2.</li> <li>o For the VA project, we assisted the Harvard team with identifying zip codes for approximately 550 LS participants that separated from the Army between Wave 2 and Wave 3.</li> </ul> </li> </ul> <p>Enclave and User Support:</p> <ul style="list-style-type: none"> <li>? Annual Security Controls Review: On January 20, Marcus Blough (Enclave Security Lead) and Meredith met with members of AAG, M&amp;RA and USUHS to carry out the 2022 review. Follow-up materials and artifacts will be exchanged between U-M and AAG next month before the 2022 approval letter is issued.</li> <li>? Annual Security Training Renewal 2023: We continued to receive completed STARRS Annual DOD Training Renewal training materials from Enclave users. As of the January 31 completion due date, there were 3-4 renewals outstanding; we will follow up with those individuals in the coming weeks.</li> <li>? The annual NDI data deliverable was completed and posted to the Enclave on January 27.</li> <li>? 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"> <li>o We worked 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.</li> <li>o We assisted a USUHS researcher with requests for information about the LS Wave 3 IRB materials and projected dates for W3 and W4 data loads.</li> <li>o The Enclave IT team added back to the Enclave R packages that had been removed during a recent upgrade, but were still needed by Harvard analysts.</li> </ul> </li> </ul> <p>Wave 3 Data Deliverable</p> <ul style="list-style-type: none"> <li>? We coordinated with Harvard to establish milestone dates for the LS Wave 3 internal/Enclave data delivery and public use data delivery.</li> <li>o We met the first of these dates, with the load of preliminary W3 survey data to the Enclave on December 21.</li> <li>o Harvard delivered survey started and final accepted complete flags for the Wave 3 data on January 26.</li> <li>? U-M began work on occupation/industry and open-ended response coding.</li> <li>? U-M began work on the Wave 3 final outcomes dataset and sample flowchart.</li> </ul> <p>Public Use Data:</p> <ul style="list-style-type: none"> <li>? We sent the ICPSR Quarterly User Report to USUHS on January 18. Dr. Cox sent some questions about the report content. Meredith responded to Dr. Cox on January 23.</li> <li>? Biosample flags, administrative variables, and inventory document: <ul style="list-style-type: none"> <li>o We awaited funding for this work (but U-M can start on the IRB submission in early 2023).</li> <li>o The work scope includes adding the WGS flag.</li> </ul> </li> <li>? Questions related to the degree of aggregation of certain variables and non-job duty MOS were resolved with the GSC Executive Committee.</li> <li>? 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.</li> </ul> <p>Wave 4 Production Updates:</p> <ul style="list-style-type: none"> <li>? Wave 4 production statistics, as of February 8, 2023, are as follows: <ul style="list-style-type: none"> <li>o Replicates released: 3 of 14 released with 2,828 sample lines.</li> <li>o Completed interviews: 1,561 (1,492 web; 69 phone).</li> <li>o Replicate 1 data collection was completed on Sunday, January 22 with a final response rate of 70.1%, which is 9.3 percentage points lower than the final Wave 3 Replicate 1 response rate, and 6.6 percentage points lower than the Wave 3 average.</li> <li>o Replicate 2 is currently in Phase 4 and the response rate is 62.6%. The response rate trend is very similar to Replicate 1.</li> <li>o Replicate 3 was released on January 16. By February 8, it was in Phase 3 and receiving phone calls. The response rate is currently 41.1% and tracking higher than the Replicate 1 and 2 rates.</li> </ul> </li> </ul> <p>Safety Plan Results:</p> <ul style="list-style-type: none"> <li>? The Wave 4 Safety Plan rate is 10.5% as of February 8.</li> </ul>

## 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 begun with slightly higher response rates than Replicates 1 and 2. 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).

<b>Cost as of Dec 31, 2022</b>	<b>Total Cost to Date (direct + indirect):</b>	6,569,253.62
	<b>Est Cost at Completion (E\$AC):</b>	12,878,687.83
	<b>Total Budget:</b>	12,809,390.00
	<b>Variance (Total Budget minus- E\$AC):</b>	-69,297.82
	<b>Reason for Variance:</b>	We spent a total of \$235,725 in December. Our projected deficit for the total five-year project is slightly lower at \$69,298 (from \$76,789 in November). We will continue to review project expenses and update our projections based on realized costs and our experiences to date.
<b>Projections as of Dec 31, 2022</b>	<b>Dollars Projected for Month:</b>	304,016.78
	<b>Actual Dollars Used:</b>	235,725.41
	<b>Variance (Projected minus Actual):</b>	68,291.37
	<b>Reason for Variance:</b>	There was a significant chunk (\$15K) of Rpay that did not hit in December, as well as hosting from the training and some IWing staff recharges. These will be moved forward. Despite having reduced regular staff hours somewhat for the shortened month of December, there were still savings in staff hours worked.






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

## Other Measures

<b>Total Budget:</b>		20,000.00		
<b>Variance (Total Budget minus- E\$AC):</b>		-13,384.34		
<b>Reason for Variance:</b>		See monthly updates		
<b>Projections as of</b>	<b>Dollars Projected for Month:</b>	1,658.19		
	<b>Actual Dollars Used:</b>	3,293.01		
	<b>Variance (Projected minus Actual):</b>	-1,634.82		
	<b>Reason for Variance:</b>	See monthly updates		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
<b>Other Measures</b>				

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	Jan, 2023 (TSME SRO SYS MAINTENANCE-GENERAL(483910))		Implementing
Risk Level	On Track		
Monthly Updates	Survey Trak Build team meetings Proj Removal Equip Return bugs/enhancements R Profile Loader New build of SurveyTrak and other systems enhancements Having a mix of Blaise 4 and Blaise 5 instruments in one Surveytrak project Upgrade of the ColdFusion servers from CF2021 patch 1 to CF2021 patch 5 This patch (finally) includes a Query of Queries bug fix from Adobe.		
Special Issues			
Cost as of	Total Cost to Date (direct + indirect):	25,089.41	
	Est Cost at Completion (E\$AC):	33,380.34	

## Developmental/Initiative Projects Dashboard

NonArchived Development Initiative and No-DataCol Projects				
Project	Type	Phase	Project Lead	Jan
<i>TSME SRO SYS MAINTENANCE- GENERAL(483910)</i>	Initiatives	Implementing	Jeffrey L Smith	
<i>TSME23 DCO Tech System Support FY2023</i>	Initiatives	Implementing	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	(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, lwer Web Site, etc.		
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	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	Jan, 2023 (TSME23 DCO Tech System	Implementing	
Risk Level	Some Concerns		
Monthly Updates	<p>Launched the New Interviewer website on WordPress platform with First Of The Year (FOTY) check-in</p> <p>Worked with CMT to fix a lot of server configuration issues on WordPress</p> <p>Added a new Photo Download function in Fred</p> <p>Created a new Generic Screener for customized display (for SSL)</p>		
Special Issues	needs for support are greater than the budget allocation		
Cost as of Feb 07, 2023	Total Cost to Date (direct + indirect):	43,630.59	
	Est Cost at Completion (E\$AC):	43,630.59	
	Total Budget:	35,000.00	
	Variance (Total Budget minus- E\$AC):	-8,630.59	
	Reason for Variance:	Budget not sufficient to fund support needed	
Projections as of Feb 07, 2023	Dollars Projected for Month:	0.00	

Actual Dollars Used: 2,938.11

Variance (Projected minus Actual): -2,938.11

Reason for Variance: Budget not sufficient to fund support needed

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

Other Measures



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	Jan, 2023 (TSME23-PIPPA)	Implementing	
Risk Level	On Track		
Monthly Updates	Design specs set for implementation of a Project Ranking Report with the ability to change score weights for the entire project or for selected individuals.		
Special Issues			
Cost as of Feb 07, 2023	Total Cost to Date (direct + indirect):	10,939.06	
	Est Cost at Completion (E\$AC):	12,796.02	
	Total Budget:	10,000.00	
	Variance (Total Budget minus- E\$AC):	-2,796.02	
	Reason for Variance:	Extra work to design and implement custom ranking and scoring routines.	
Projections as of Feb 07, 2023	Dollars Projected for Month:	1,065.73	
	Actual Dollars Used:	3,404.96	
	Variance (Projected minus Actual):	-2,339.23	
	Reason for Variance:	Extra work to design and implement custom ranking and scoring routines.	

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

Other Measures

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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	Jan, 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.  January hours were used to 1. Tested and Deployed the Evaluator assessment feature in Olive. 2. Attend meetings related to QC solutions. 3. Continue to work with Mark N to enhance the QC Production Report with the new Evaluator assessment feature in Olive.		
Special Issues			
Cost as of Feb 15, 2023	Total Cost to Date (direct + indirect):	21,473.00	
	Est Cost at Completion (E\$AC):	29,918.56	
	Total Budget:	30,000.00	
	Variance (Total Budget minus- E\$AC):	81.44	
	Reason for Variance:	Small variance.	
Projections as of Feb 15, 2023	Dollars Projected for Month:	2,226.64	

Actual Dollars Used: 3,465.79

Variance (Projected minus Actual): -1,239.15

Reason for Variance: Programmer was finishing task that was due and needed some more hours.

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	Jan, 2023 (TSME23-SelfSchedUI (483424))		Implementing
Risk Level	On Track		
Monthly Updates	<p>Peter has done his programming piece in January and early February. Andrew H. and Andrew P. tested and worked out a few items on the ODS side and provide Peter with a small list of items to address. A version has been released to PSID (INT2) for their testing of the scheduler and their protocol and related emails.</p> <p>Cheng created a user interface in PQT for the those with certain rights to set the parameters that ODS takes into account when determining appointment slots.</p> <p>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.</p> <p>Andrew will schedule a project review in March to demo the system for Admin.</p>		

Special Issues	The cost report looks a little odd because Peter corrected a timesheet in the last fiscal year in the current fiscal year. Since the same shortcode is being used it looks like there is more money available than the \$10,000 (+~\$1,800).			
Cost as of Feb 13, 2023	Total Cost to Date (direct + indirect):			6,507.22
	Est Cost at Completion (E\$AC):			8,027.68
	Total Budget:			10,000.00
	Variance (Total Budget minus- E\$AC):			1,972.32
	Reason for Variance:			Waiting on an estimate from TSG for web API programming.
Projections as of Feb 13, 2023	Dollars Projected for Month:			4,927.23
	Actual Dollars Used:			4,201.19
	Variance (Projected minus Actual):			726.04
	Reason for Variance:			Minimal variance.
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				