Survey Research Operations

Monthly Project Report

Sponsored Data Collection Projects and Development Initiative

June 2023

Sponsored Data Collection Projects and Development Initiative Projects

(AFHS) American Family Health Study

(AFHS-Additional work) American Family Health Study - additional work

(ANES 2024) American National Election Studies - 2024

(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

(CCS) Community College Survey

(CRUSE - AHDFS) Survey on Crypto-Asset Adoption and Use / American Household Digital Finance Survey

(DCUS) Daily Cannabis Use Study

(ECHO (Year 7)) Environmental Influences on Child Health Outcomes

(EDC-Endline) Every Dollar Counts Endline

(HART) Health, Aging, and Retirement in Thailand (HART) - SRO consultation (2023)

(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 2024) Health and Retirement Study 2024

(HRS HOC) Health and Retirement Study – Historical Occupation Coding

(HRS2022-Screening) HRS 2022 - Screening

(IHDS3) India Human Development Survey Wave 3

(LHMS 2023 Spring) Life History Mail Study Spring 2023

(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

(SAME) Skills Assessments Mode Evaluation Study

(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 23-Web Portal Documentation/Updates (423463)) TSME 23-Web Portal Documentation/Updates (423463)

(TSME SRO SYS MAINTENANCE-GENERAL(483910)) TSME SRO SYS MAINTENANCE-GENERAL(483910)

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

(TSME23-PIPPA (425198)) PIPPA 2.0 (425198) FY23

(TSME23-QC-Systems (483249)) TSME23-QC-Systems (483249)

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

(TSME23-Update Report Portal) Update Report Portal (425201) FY23

Sponsored Projects Dashboard

NonArchived Sponsored Projects

Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr	May	Jun
AFHS	Sponsored	Closing	Rebecca Gatward	🟢	🟢	🟢	🟢	🟢	🟢
AFHS-Additional work	Sponsored	Implementing	Rebecca Gatward	🟢	🟢	🟢	🟢	🟢	🟢
ANES 2024	Sponsored	Planning	Andrew L Hupp	☐	☐	☐	☐	☐	🟢
BFY	Sponsored	Implementing	Piotr Dworak	🟢	🟢	🟢	🟢	🟢	🟢
BHM Library Project	Sponsored	Implementing	Karin Schneider	🟢	🟢	🟡	🟡	🟡	🟡
CARE Military	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢	🟢	🟢
CARE SALTOS MTEC	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢	🟢	🟢
CCS	Sponsored	Implementing	Jeffrey Albrecht Jr	☐	☐	☐	☐	☐	🟢
CRUSE - AHDFS	Sponsored	Closing	Piotr Dworak	🟢	🟡	🟢	🟢	🟢	🟢
DCUS	Sponsored	Implementing	Gary Hein	☐	🟢	🟢	🟢	🟢	🟢
ECHO (Year 7)	Sponsored	Implementing	Shonda R Kruger-Ndiaye	🟢	🟢	🟢	🟢	🟢	🟢
EDC-Endline	Sponsored	Implementing	Karin Schneider	🟢	🟢	🟢	🟢	🟢	🟢
HART	Sponsored	Implementing	Nicole G Kirgis	☐	☐	☐	☐	🟢	🟢
HCAP 2022	Sponsored	Implementing	Maureen Joan O'Brien	🟡	🟡	🟡	🟡	🟢	🟢
Health and Well Being in SE MI	Sponsored	Implementing	Barbara Lohr Ward	🔴	🔴	🔴	🔴	🟡	🟡
HRS 2022 Panel & Baselines	Sponsored	Implementing	Evanthia Leissou	🟡	🟡	🟡	🟡	🟡	🟡
HRS 2024	Sponsored	Initiation	Evanthia Leissou	☐	☐	☐	☐	🟢	🟢
HRS HOC	Sponsored	Planning	Gloria J Baker	🟢	🟢	🟢	🟢	🟢	🟢
HRS2022-Screening	Sponsored	Implementing	Evanthia Leissou	🟡	🟡	🟡	🟡	🟡	🟡
IHDS3	Sponsored	Implementing	Sarah Elisa Broumand	🟡	🟡	🟡	🟡	🟡	🟡
LHMS 2023 Spring	Sponsored	Implementing	Gary Hein	☐	☐	☐	☐	🟢	🟢
MI CReSS (Year 3)	Sponsored	Implementing	Timothy Prand	🟢	🟢	🟢	🟢	🟢	🟢
MTF Base Year 2022_27	Sponsored	Implementing	Rebecca Gatward	🟢	🟢	🟢	🟢	🟢	🟢
MTF Panel 2022-27	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢	🟢	🟢
PR-PSID	Sponsored	Implementing	Shonda R Kruger-Ndiaye	🟡	🟡	🟡	🟡	🟡	🟡
PSID CDS 2023	Sponsored	Initiation	Piotr Dworak	🟡	🟢	🟢	🟢	🟢	🟢
PSID23	Sponsored	Implementing	Rachel Anne Orlowski	🟡	🟡	🟡	🟡	🟡	🟡
PSID23 Online Contact Update	Sponsored	Closing	Camila Kendall	🟢	🟢	🟢	🟢	🟢	🟢
QoL & Hearing Loss	Sponsored	Implementing	Margaret Lee Hudson	🟢	🟢	🟢	🟢	🟢	🟢
SAME	Sponsored	Implementing	Hongyu Johnson	☐	🟢	🟢	🟡	🟡	🟡
SCA 2023	Sponsored	Implementing	Theresa Camelo	🟢	🟢	🟢	🟢	🟢	🟢
SRS 2021	Sponsored	Implementing	Barbara Lohr Ward	🔴	🔴	🔴	🔴	🟡	🟡
STARRS-LS Waves 3 & 4	Sponsored	Implementing	Meredith A House	🟢	🟢	🟢	🟢	🟢	🟢

Project Name	**(AFHS) American Family Health Study**
Project Mode	Primary: Web Secondary: Mail Total of Modes: 3
Project Type	Sponsored Projects
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	The American Family Health Study is a methodological project which aims to evaluate the feasibility of collecting national family, fertility and reproductive health data on a nationally-representative sample using a self-administered mode that is comparable to data collected with an in-person (interviewer-administered) study.

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

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

The sample (addresses) will be selected via Market Systems Group (MSG). The following response assumptions have been made: at the screening stage, we estimate a response rate of 50% (around 21,000). Of these we expect approximately 12,000 addresses to contain an eligible person. In households with more than one eligible person we will randomly select one person.
The contact protocol for the screener and main data collection is designed to, initially, push completion by web. Addresses or selected participants will only be mailed a paper screener or questionnaire after reminders encouraging completion online. This is a recent change to the protocol and was made after the SRO budget proposal was provided to the PI.
The main interview consists of three modules which will replicate almost all NSFG content. The PI group is leading the process of reviewing and translating the content to web format and will provide specifications for programming to SRO.
The following revisions have been made to the study design as detailed in the latest budget proposal (SRO scope of work);
o We will use an external vendor to scan returned paper screeners, rather than manual data entry. This vendor will also format the paper forms, print materials and be responsible for most of the respondent mailings.
o The original study design did not include web as a mode of data collection for screening. Additional funding from SRC has been obtained by the Principal Investigator to cover the development of a web screener and associated data management and reporting costs.
o Telephone reminder calls remains one of the steps in the non-response protocol for the main data collection. However, it is likely that this effort will be targeted to a subset of the selected sample, rather than across the entire sample.
o The amount budgeted for the TOA for the screener was $2 and $5 – 50% of the sample to receive each amount. The TOA amount will now be $2 for the full sample. We may provide an additional TOA of $5 to a subset of the non-responders as part of one of the follow-up reminder mailings (depending on available budget).
o The eligibility age range for the study has been changed from 15-49 to 18-49. This eliminates the need to contact to parents/guardians of all eligible respondents who have not reached the age of majority to gain consent to participate in the study. There are three states where the age of majority is above 18 years of age – in these states we will adjust the selection protocol as necessary.
o A further change to the study protocol is around completion of the main modules. In some circumstances we will provide Respondents the option to move directly to complete the main modules after completing the screener without being sent an invite in the mail/email to do so. This will only happen if the selected R is also the person who completed the screener.
o An experiment around completion of the modules has been introduced to the protocol. Twenty per cent of the selected eligible respondents will be invited to complete the full 60 minute survey as one instrument, rather than completing three separate modules. |
SRO Project Period	01/2019 - 03/2022
Data Col Period	05/2020 - 04/2022
Security Plan	NA

Milestones			
	Pre Production Start: 09/01/2018	*Pretest Start:*	
	Pretest End:	*Recruitment Start:*	
	Staffing Complete:	*GIT Start:*	
	SS Train Start:	*SS Train End:*	
	DC Start: 04/21/2020	*DC End:* 04/30/2022	

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

Report Period	June, 2023 (AFHS)	Closing
Risk Level	On Track	
Monthly Updates	June update Since last month the overspend on the main AFHS project decreased due to a refund for uncashed cheques. These are the final cheques outstanding that could be credited. Current SRO focus: 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 (AFHS -Panel Feasibility).	
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 Jul 12, 2023		
Total Cost to Date (direct + indirect):		2,507,734.78
Est Cost at Completion (E$AC):		2,507,734.78
Total Budget:		2,490,133.00
Variance (Total Budget minus- E$AC):		-17,601.78
Reason for Variance:	June 2023 update - Since last month the overspend on the main AFHS project decreased from $11,494 to $11,284 (direct). This was due to a refund of $210 for uncashed checks. This is the last of the outstanding uncashed checks.	

Projections as of Jul 12, 2023		
Dollars Projected for Month:		0.00
Actual Dollars Used:		-218.34
Variance (Projected minus Actual):		218.34
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 amount credited was for uncashed cheques.	

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

Other Measures

Project Name	**(AFHS-Additional work) American Family Health Study - additional work**		
Project Mode	Primary: Web Secondary: Mail Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 50,265.00	**Indirect Budget:** 0.00	**Total Budget:** 50,265.00
Principal Investigator/Clients	Brady West (SRC)		
Funding Agency	Internal UM sequestering funds		
IRB	*HUM#:* HUM00167171		*Period of Approval:*
Project Team	*Project Lead:* Rebecca Gatward		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lloyd Fate Hemingway		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	The American Family Health Study is a methodological project which aims to evaluate the feasibility of collecting national family, fertility and reproductive health data on a nationally-representative sample using a self-administered mode that is comparable to data collected with an in-person (interviewer-administered) study.		

The research design for the AFHS has seven clear steps. The additional work covered by this funding is to conduct step 7 (below):

Step 1: finalize the design of the national web-based survey, using as much National Survey of Family Growth (NSFG) content as possible.

Step 2: field the national web-based sequential mixed-mode survey over a two-year period, with the goal of collecting 4,000 completed surveys from a nationally representative sample.

Step 3: conduct statistical analyses providing full-sample comparisons of estimates between our survey and the corresponding public-use data files for the NSFG from a similar time period.

Step 4: conduct statistical analyses comparing estimates within key socio-demographic subgroups of the population – gender, race, and age groups.

Step 5: examine changes in the gap in estimates (between the NSFG and our national web survey) across phases of the sequential mixed-mode design protocol.

Step 6: compare costs, response indicators, and measures of effort across socio-demographic subgroups for different data collection modes and modules of the web-based survey.

Step 7: further methodological research involving AFHS participants and non-respondents to inform the design of a larger-scale AFHS (research proposal).

**********AFHS Panel Feasibility Survey*******************

The first component of this step involves AFHS respondents from the second sample replicate (n=~1370). These respondents will be invited to participate in a brief follow-up survey that aims to collect responses to a small number of additional questions (12) related to health, relationships, and finances, as well as gauge the interest of the respondent in becoming a panel member. These results will primarily be used to inform the design of a larger-scale AFHS study (research proposal); additional substantive analyses of the questions will also be conducted.

All AFHS participants from the second sample replicate (n=~1370) will be invited to participate in the panel feasibility follow-up survey. The initial invitation to participants will be by letter, which will be mailed along with a $2 token of appreciation. We will use addresses sampled for sample replicate 2 from the GENESYS system of Marketing Systems Group (MSG) - unless we received an updated address from the participant. We will also send the invitation by email for those participants who have provided a valid email address (84%).

Non-response contact protocol:
7 days after the initial invitation is mailed, participants will be contacted again by email (if available).
14 days - we will send a further reminder by email or text message.
21 days - email sent.
28 days - paper copy of the survey along with a $5 cash token to remaining non-responding participants.
42 days - depending on the response rate we will telephone the participant to invite them to complete the follow-up survey.

Participants will be mailed a $10 check after completing the survey.

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

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

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

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

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

SRO Project Period	06/2022 - 09/2023
Data Col Period	06/2022 - 08/2022
Security Plan	NA

Milestones		
Pre Production Start:		*Pretest Start:*
Pretest End:		*Recruitment Start:*
Staffing Complete:		*GIT Start:*
SS Train Start:		*SS Train End:*
DC Start:		*DC End:*

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))

Report Period	June, 2023 (AFHS-Additional work)	Implementing
Risk Level	On Track	
Monthly Updates	June updates SRO involvement is now minimal - The PI group plan to submit a new research proposal for the AFHS Panel in July 2023 and a state level project in October 2023. 6/19 - SRO has provided an updated (and final) SRO budget to the PI group.	
Special Issues		

Cost as of Jul 12, 2023	*Total Cost to Date (direct + indirect):*		58,581.83
	Est Cost at Completion (E$AC):		61,560.51
	Total Budget:		50,265.00
	Variance (Total Budget minus- E$AC):		-11,295.51
	Reason for Variance:	AFHS Feasibility Pilot Estimate – Expanded SRO # 22-0037R01 This piece of work is being funded by sequestering funds. Hours for Colette and I are projected to provide minimal support as needed (up to 6hrs/month) until Sept'23 which increases the amount to be covered by sequestering funds. I charged two hours last month.	

Projections as of Jul 12, 2023	*Dollars Projected for Month:*		986.72
	Actual Dollars Used:		247.20
	Variance (Projected minus Actual):		739.52
	Reason for Variance:	Hours for Colette and I are projected to provide minimal support as needed (up to 6hrs/month) until Sept'23 which increases the amount to be covered by sequestering funds. I charged two hours last month.	

Measures

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

Other Measures

Measures

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

Other Measures

Project Name	(ANES 2024) American National Election Studies - 2024		
Project Mode	Primary: Face to Face Secondary: Web Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 4,558,724.00	**Indirect Budget:** 2,466,088.00	**Total Budget:** 7,024,812.00
Principal	Nicholas A. Valentino (University of Michigan)		
Investigator/Clients	Shanto Iyengar (Stanford University)		
	D. Sunshine Hillygus (Duke University)		
Funding Agency	National Science Foundation (NSF)		
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Andrew L Hupp		
	Budget Analyst: William Lokers		
	Production Manager:		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	The mission of the American National Election Studies (ANES) is to inform explanations of election outcomes by providing data that support rich hypothesis testing, maximize methodological excellence, measure many variables, and promote comparisons across people, contexts, and time. The ANES serves this mission by providing researchers with a view of the political world through the eyes of ordinary citizens. SRO will be conducting the 2024 data collection.		
SRO Project Period	07/2023 - 01/2025		
Data Col Period			
Security Plan	NA		

Milestones	*Pre Production Start:*	*Pretest Start:*
	Pretest End:	*Recruitment Start:*
	Staffing Complete:	*GIT Start:*
	SS Train Start:	*SS Train End:*
	DC Start:	*DC End:*

Other Project Team Members	Erin McSpadden - Project Manager for the methods pilot Sharon Parker - Production Manager for the methods pilot Raphael Nishimura - Sampling (pilot and production)
Other Project Name	
Sample Mgmt System	NA
Data Col Tool	Blaise 5; Other (PAPI)
Hardware	Laptop; [UM cell] Phone; Paper and Pencil
DE Software	N/A
QC Recording Tool	Camtasia
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post; Cash, post ($25 (methods pilot) for each interview)
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)

Report Period	June, 2023 (ANES 2024)	Planning
Risk Level	On Track	
Monthly Updates	Work is currently focusing on preparation for the methods work this summer. The methods work includes doing two interviews ~4 weeks apart. The first interview is an in-person interview (n=~200). The second interview is a video interview conducted via Zoom (n-160). All interviews will be completed via a paper questionnaire to be developed by ANES project staff. No technical systems are being used for this work. There are two one-hour trainings planned prior to each interview. The first will be in August and the the second will be in September. The PIs would like the data collection complete prior to a board meeting in Austin, TX in mid-November. Sharon is in the process of identifying field staff not currently on a project that can do this work. Once the interviewers have been identified Raphael will order addresses from MSG. EJ is drafting the invitation letter and text for the interviews to use to talk about the video interview. Andrew is updating the timeline. There is a weekly meeting with project staff that starts on 7/24. EJ's and Andrew's time in July was charged to PDMG OH. Once the ANES shortcodes have been set-up the July timesheets will be corrected. Presumably the accounts will be available prior to the August timesheet deadline.	

Special Issues

Cost as of	**Total Cost to Date (direct + indirect):**	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	7,024,812.00
	Variance (Total Budget minus- E$AC):	0.00
	Reason for Variance:	Bill L. is in the process of setting up the shortcodes for the methods pilot work.
Projections as of	**Dollars Projected for Month:**	0.00
	Actual Dollars Used:	0.00
	Variance (Projected minus Actual):	0.00
	Reason for Variance:	

Measures

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

Other Measures

Project Name	(BFY) Baby's First Years		
Project Mode	Primary: Face to Face Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 5,843,681.00	**Indirect Budget:** 1,994,180.73	**Total Budget:** 7,837,861.73
Principal	Dr. Greg Duncan (University of California - Irvine)		
Investigator/Clients	Dr. Kimberly Noble (Teachers College Columbia University)		
	Dr. Katherine Magnuson (University of Wisconsin)		
Funding Agency	National Institute of Child Health and Human Development (NICHD)		
IRB	**HUM#:** HUM00137963		**Period of Approval:**
Project Team	**Project Lead:** Piotr Dworak		
	Budget Analyst: Janelle P Cramer		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Margaret Lavanger		
	Production Manager 2: Michelle Smith		
Proposal #	no data		

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

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

Milestones	**Pre Production Start:** 10/01/2017	**Pretest Start:**
	Pretest End:	**Recruitment Start:** 01/01/2018
	Staffing Complete: 02/07/2018	**GIT Start:** 03/19/2018
	SS Train Start: 03/20/2018	**SS Train End:** 03/22/2018
	DC Start: 05/07/2018	**DC End:** 06/30/2022

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

Other Project Name	HHICD Household Income and Childhood Development
Sample Mgmt System	MSMS
Data Col Tool	Blaise 5
Hardware	Laptop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	Other (to be specified)
Incentive	Yes, R
Administration	SRO Group
Payment Type	Cash, prepaid (50)
Payment Method	Check through other system (MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (MSMS)

Report Period	June, 2023 (BFY)	Implementing
Risk Level	On Track	

Monthly Updates	BFY Age 5- 8:

BFY has awarded SRO continuing work throughout Age 8 (August 2027). We are currently conducting a one-time Age5 Catch Up activity re-contacting all Rs who completed Age 4 Lab Visit but have not had their contact information updated since. In August 2023, we will switch to an ongoing follow up with respondents at 4, 8, then 12 months past their 4, 5, 6, and 7 year birthday.

As part of that effort, we are also planning to send a 5-year birthday postcard to the focal children.

Age 0 - 4 Update:

In June and July, SRO interviewers have completed in-person work and locating to aid Research Lab teams in meeting their Age 4 Lab production goals. SRO's assistance was critical, in particular in NOLA and NE, where interviewers teamed up with local research assistants to visit respondents, address concerns, and secure their participation. SRO interviewers were able to dramatically boost production goals thanks to the relationships they built with respondents over the last few waves.

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).

Between July 2022 and April 2023 interviewers conducted 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.

On 5/22/2023, we delivered the last batch of cases to the lab.

However, interviewers still continue locating hard-to-reach cases through the end of Age 4 on July 31, 2023 in addition to the new scope mentioned above.

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 Iwers (e.g., addressing R concerns, etc.), and directly reaching out to and locate some hard-to-reach Rs. We have worked on ~ 100 cases and part of that effort includes upcoming trips to NOLA in May and June.

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

Technical system:
All tech systems are working as needed.

Finances:

A notification was sent to the PIs on 1/20 estimating the total expected underrun may reach ~ $300K. PIs are expected to apply this underrun to extending SRO involvement through Age 6 or 8.

Special Issues			
Cost as of Jul 19, 2023	*Total Cost to Date (direct + indirect):*		7,442,825.12
	Est Cost at Completion (E$AC):		7,469,150.47
	Total Budget:		7,837,861.73
	Variance (Total Budget minus- E$AC):		368,711.26
	Reason for Variance:	We continue to extend underrun even after adjusting the budget to forecast all potential sources of underrun - mainly due to decreasing demand for SRO assistance with the current active cases and a delay in engaging SRO in the future contact update activities. However, PIs are on the cusp of formally extending SROs engagement through Age 8 of the focal child and part of that engagement will be funded from the current underrun.	
Projections as of Jul 19, 2023	*Dollars Projected for Month:*		64,400.91
	Actual Dollars Used:		51,128.36
	Variance (Projected minus Actual):		13,272.55
	Reason for Variance:	Despite adjustments, we continue to see underrun due to lower iwer hours and savings in the project management time.	

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

Project Name	**(BHM Library Project) Developing a Model of Black History Month Programming in Public Libraries**
Project Mode	Primary: Web Total of Modes: 1
Project Type	Sponsored Projects
Budget	**Direct Budget**: 126,712.00 **Indirect Budget:** 70,959.00 **Total Budget:** 197,671.00
Principal Investigator/Clients	Deborah Robinson (ISR)
Funding Agency	
IRB	*HUM#:* *Period of Approval:*
Project Team	*Project Lead:* Karin Schneider
	Budget Analyst:
	Production Manager:
	Senior Project Advisor: Nicole G Kirgis
	Production Manager 1:
	Production Manager 2:
Proposal #	no data
Description	SRO will support the project in the first year by working with you to design the sample. SRO will support the implementation of up to two pilot surveys and the larger national survey of libraries. We will provide consultation on scale development throughout the pilot phase and provide statistical support to finalize the scales and provide a working dataset (with weights to account for the stratified sample design). In total, the SRO period of performance will be approximately 24 months in duration, starting in February of 2023, with data collections for the pilots and national survey taking place over approximately 12 months, starting in late 2023.
SRO Project Period	02/2023 - 02/2025
Data Col Period	10/2023 - 09/2024
Security Plan	NA

Milestones			
	Pre Production Start:	*Pretest Start:*	
	Pretest End:	*Recruitment Start:*	
	Staffing Complete:	*GIT Start:*	
	SS Train Start:	*SS Train End:*	
	DC Start:	*DC End:*	

Other Project Team Members	
Other Project Name	Developing a Model of Black History Month Programming in Public Libraries
Sample Mgmt System	Web SMS
Data Col Tool	Blaise 5
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	Not used
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	June, 2023 (BHM Library Project)	Implementing
Risk Level	Some Concerns	
Monthly Updates	I vacillate between Implementing and Planning as we are still planning for data collection, but are implementing sample design. Not much progress to report this month. Some final decisions on sample design.	
Special Issues	PI seems underprepared to implement sample contact updates.	
Cost as of Jul 12, 2023	*Total Cost to Date (direct + indirect):*	14,172.07
	Est Cost at Completion (E$AC):	175,152.00
	Total Budget:	197,671.00
	Variance (Total Budget minus- E$AC):	22,519.00
	Reason for Variance: Only activity is planning meetings/some sample design.	
Projections as of Jul 12, 2023	*Dollars Projected for Month:*	21,612.25
	Actual Dollars Used:	2,342.66

		Variance (Projected minus Actual):			19,269.59
		Reason for Variance:	Only activity is planning meetings/some sample design.		

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

Other Measures

		Variance (Projected minus Actual):			
		Reason for Variance:	Only activity is planning meetings/some sample design.		

		Units at Complete	**RR**	**HPI**
	Current Goal:			
	Goal at Completion:			
	Current Actual:			

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	Dr. Steven Broglio (U of M Kinesiology)		
Investigator/Clients	Dr. Micheal McCrea /Dr. Pasquina (Medical College of Wisconsin/Uniformed Services Un)		
	Dr. Thomas McAllister (Indiana University School of Medicine)		
Funding Agency	NCAA and DoD		
IRB	**HUM#:** 00202691		**Period of Approval:** 7/23/2021 - open
Project Team	**Project Lead:** Donnalee Ann Grey-Farquharson		
	Budget Analyst: Carl S Remmert		
	Production Manager: Stacy Quisenberry		
	Senior Project Advisor: Barbara Lohr Ward		
	Production Manager 1: Hongyu Johnson		
	Production Manager 2: Keith Liebetreu		
Proposal #	no data		
Description	The project follows academy cadets post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure. This project has an overall SRO involvement period of 13 months, beginning March 2022, with data collection taking place over approximately 12 months starting mid-March 2022. SRO provides consultation, respondent locating activities and data collection for respondents in the uniformed services sample. The goal is to secure participation from approximately 3,200 unique past-CARE study participants. Participants will complete a study assessment once over the 13-month project period. SRO decentralized field interviewers locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct approximately 1,425 telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web. The estimate total cost for the overall scope of work is $1,426,001.00. This includes $1,131,747.00 direct and $294,254.00 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders).		
SRO Project Period	02/2022 - 03/2023		
Data Col Period	03/2022 - 02/2023		
Security Plan	NA		

Milestones	*Pre Production Start:*	*Pretest Start:*
	Pretest End:	*Recruitment Start:*
	Staffing Complete:	*GIT Start:*
	SS Train Start:	*SS Train End:*
	DC Start:	*DC End:*

Other Project Team Members	Donnalee Grey-Farquharson, Stacy Quisenberry, Hongyu Johnson, Keith Leibetreu, 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)

Report Period	June, 2023 (CARE Military)	Implementing
Risk Level	On Track	
Monthly Updates	1. Project Management: SRO received additional NCAA fund of $259,901.17 to continue military data collection beyond May 2023. The	

Sample size will not be increased per the initial agreement with the additional funding.
SRO continued to participate in weekly project management meetings with the research team.
Revised monthly projections and staffing plan.
SRO requested QG to provide data on Social Media platforms performance in order to evaluate the efficiency of using them.
SRO continued to work with the research team and QG on sample quality issues.

2. Care SMS system update:
SRO continues to work with QG to monitor and resolve system issues during production.

3. Questionnaire Development – N/A

4. Production:
Production numbers are low because a huge proportion of the sample was just worked at the end of DCP2. SRO is looking at the long term health of the project and in attempt to refrain from burdening and distancing these Respondents we are delaying contact.
Production Stats as of 06/30/2023:
Total Released Cases: 3587: Total Comp Iws-56 – 1.6% (Web-55 -1.5%, CATI-1-0.1%)

5. Hiring and Training – N/A

6. DMSS:
Production daily reports displays DCP2 and DCP3 are running in daily basis.
Continued to work on data delivery reports with SRO staff.

7. Locating:
The Locating team continues to use the full spectrum of messages approved by IRB to communicate with the respondents.
Military find rate: 5%

Special Issues

Cost as of Jun 30, 2023	Total Cost to Date (direct + indirect):		1,441,924.60
	Est Cost at Completion (E$AC):		1,650,138.28
	Total Budget:		1,426,001.00
	Variance (Total Budget minus- E$AC):		35,764.42
	Reason for Variance:	SRO received NCAA fund of $259,901.17 to continue military data collection beyond May 2023. Military work is closed by the end of April. The underrun for Military is still showing. This is because the transfer of interviewer hours haven't been processed yet. We will update when all the costs on Military have been completed.	
Projections as of Jun 30, 2023	Dollars Projected for Month:		46,137.16
	Actual Dollars Used:		12,405.31
	Variance (Projected minus Actual):		33,731.85
	Reason for Variance:	The Military project as a whole had less spending in June then expected. It looks like the main reason for this was a lot less hours interviewers charged due to low quality of samples ISR received. As a result, the production was very slow.	

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

Other Measures

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

Milestones	*Pre Production Start:*		*Pretest Start:*	
	Pretest End:		*Recruitment Start:*	
	Staffing Complete:		*GIT Start:*	
	SS Train Start:		*SS Train End:*	
	DC Start:		*DC End:*	

Other Project Team Members	Donnalee Grey-Farquharson, Stacy Quisenberry, Hongyu Johnson, Keith Leibetreu, James Koopman, Minako Edgar, David Ackuaku, Carl Remmert
Other Project Name	CARE CSI, CARE SALTOS
Sample Mgmt System	Other (non-SRO)
Data Col Tool	Other (non-SRO)
Hardware	Laptop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, R
Administration	UM Group (Kinesiology)
Payment Type	Check, post ($150.00)

Payment Method	Check through other system (UM)

Report Period	June, 2023 (CARE SALTOS MTEC)	Implementing
Risk Level	On Track	
Monthly Updates	1. Project Management: SRO continued to participate in weekly project management meetings with the research team. Revised monthly projections and staffing plan. SRO requested QG to provide data on Social Media platforms performance in order to evaluate the efficiency of using them. SRO continued to work with the research team and QG on sample quality issues. 2. CARE SMS system update: SRO continues to work with QG to monitor and resolve system issues during production. 3. Questionnaire Development –N/A 4. Production: Production numbers are low because a huge proportion of the sample was just worked at the end of DCP2. SRO is looking at the long term health of the project and in attempt to refrain from burdening and distancing these Respondents we are delaying contact. Production Stats as of 06/30/2023: Total Released Cases: 2422: Total Comp Iws-89 – 3.6% (Web-88 -3.5%, CATI-1-0.1%) 5. Hiring and Training – N/A 6. DMSS: Production daily reports displays DCP2 and DCP3 are running in daily basis. Continued to work on data delivery reports with SRO staff. 7. Locating: The Locating team continues to use the full spectrum of messages approved by IRB to communicate with the respondents despite of experiencing some system issues in Twitter account. Civilian find rate: 11.21%	

Special Issues		
Cost as of Jun 30, 2023	*Total Cost to Date (direct + indirect):*	1,199,206.64
	Est Cost at Completion (E$AC):	4,751,944.71
	Total Budget:	4,685,914.00
	Variance (Total Budget minus- E$AC):	-66,030.71
	Reason for Variance:	MTEC is showing a big variance in May compared to what was projected. Part of what led to the current projected overrun for the project is interviewers charged more then expected. Additionally, outside of interviewers, we increased projections compared to last month. Also, ISR received low quality samples. As a result, the production was slow.
Projections as of Jun 30, 2023	*Dollars Projected for Month:*	113,421.55
	Actual Dollars Used:	106,996.94
	Variance (Projected minus Actual):	6,424.61
	Reason for Variance:	Actual dollars for June were ~$107K which were $6.4K lower than projections.

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

Other Measures

Project Name	(CCS) Community College Survey		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 560,774.00	**Indirect Budget:** 84,115.00	**Total Budget:** 644,889.00
Principal	Hana Lahr (Teachers College, Columbia University)		
Investigator/Clients	Veronica Minaya		
	Rachel Baker		
Funding Agency	Ascendium Education Group		
IRB	*HUM#:* 00237400		*Period of Approval:*
Project Team	*Project Lead:* Jeffrey Albrecht Jr		
	Budget Analyst: William Lokers		
	Production Manager:		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1: Rebecca Loomis		
	Production Manager 2:		
Proposal #	no data		
Description	The CCS seeks to understand factors that influence first year community college students in their program choice. We will survey a selection of students entering a community college for the first time in the fall of 2023 and then follow up with them in the second semester (Spring 2024) and their third semester (Fall 2024). The researchers will recruit 4 community colleges to participate.		
SRO Project Period	01/2023 - 03/2025		
Data Col Period	10/2023 - 11/2024		
Security Plan	NA		

Milestones	*Pre Production Start:*	*Pretest Start:*
	Pretest End:	*Recruitment Start:*
	Staffing Complete:	*GIT Start:*
	SS Train Start:	*SS Train End:*
	DC Start:	*DC End:*

Other Project Team Members	Marsha Skoman - Qualtrics Programmer Ed Green - Data Manager Hueichun Peng - Web SMS Programmer
Other Project Name	How Community College Students Choose Programs of Study
Sample Mgmt System	Web SMS
Data Col Tool	Other (Qualtrics)
Hardware	NA
DE Software	NA
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group
Payment Type	Cash, post (20)
Payment Method	Other (VISA eGift cards)

Report Period	June, 2023 (CCS)	Implementing
Risk Level	On Track	
Monthly Updates	The project started earlier than expected, which was good, because the research team needed quite a bit of support in preparing for their pilot. While the pilot was not in the work scope, it gave us the chance to program the initial survey and consult on survey design and pilot implementation, which the researchers appreciated very much.	
Special Issues	We are waiting for final IRB approval, which has been held up as IRB staff at both Teachers College and U-M have been out of office.	

Cost as of Jul 19, 2023	*Total Cost to Date (direct + indirect):*		15,132.78
	Est Cost at Completion (E$AC):		643,836.62
	Total Budget:		644,889.00
	Variance (Total Budget minus- E$AC):		1,052.38
	Reason for Variance:	We are still in the early phase of the project and will have better estimates once we start production and get through Wave 1 this fall.	
Projections as of Jul 19, 2023	*Dollars Projected for Month:*		15,576.94

Actual Dollars Used:			10,049.36
Variance (Projected minus Actual):			5,527.58
Reason for Variance:	Budget funds were initially distributed evenly across the project duration, but effort will be higher around production. So we expect to have more accurate projections once we get production going.		

Measures

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

Other Measures

Actual Dollars Used:			10,049.36
Variance (Projected minus Actual):			5,527.58
Reason for Variance:	Budget funds were initially distributed evenly across the project duration, but effort will be higher around production. So we expect to have more accurate projections once we get production going.		

Measures

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

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**: 469,808.00	**Indirect Budget:** 136,244.00	**Total Budget:** 606,052.00
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	Revised project costs are $635,344 ($625,726 + $9,618). Original description below. Focus groups completed as designed. Project has been revised in that the PI has requested only an initial replicate be used for the survey pending full funding availability. Also, full indirect rate is not applied as we originally indicated. ORSP and Financial Services determined this was not research but was in fact other sponsored activity. IDC revised to 29%. ORIGINAL DESCRIPTION: SRO will conduct two exploratory focus groups and web-based data collection to study awareness, use and adoption of crypto-assets in the general population and more specifically among those more informed about crypto-assets. SRO will screen an address-based representative sample of approximately 40,980 U.S. households for adults who hold or have held crypto-assets. All who report crypto-asset holdings will be invited to participate in the web survey, along with a random sub-sample of those who have not held crypto-assets. SRO interviewers will conduct reminder calling to non-respondents to encourage them to participate in the survey. This budget assumes an overall SRO involvement period of 12 months commencing in May 2022 with focus groups taking place in May or early June 2022 and the web data collection taking place during a 5-month period beginning September 2022. The total cost for this work is estimated at $1,724,766 ($1,105,619 direct, $619,147 indirect), budgeted at the University-approved indirect recovery rate of 56 percent. $635,344 ($625,726 + $9,618).		
SRO Project Period	05/2022 - 04/2023		
Data Col Period	10/2022 - 02/2023		
Security Plan	NA		

Milestones		
Pre Production Start: 08/01/2022	*Pretest Start:*
Pretest End:	*Recruitment Start:* 09/14/2022
Staffing Complete: 10/14/2022	*GIT Start:* 11/29/2022
SS Train Start: 11/29/2022	*SS Train End:* 11/29/2022
DC Start: 11/02/2022	*DC End:* 03/01/2023

Other Project Team Members	Karin Schneider conducted focus group. Survey phase led by Piotr Dworak. Team include Ian Ogden and Xiomara Guerra.

Other Project 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	June, 2023 (CRUSE - AHDFS)	Closing
Risk Level	On Track	
Monthly Updates	There are no updates since last month ... Crypto has delivered the final data and weights and is awaiting any client questions / feedback before closing.	

In terms of final production yields --------------------

Crypto had exceeded the goal after adding sample. We ended the project with 1,774 interviews vs. the goal of 1539. Stats Unit and PM conducted a response bias analysis to make sure the latest release produced unbiased results despite being given less time to mature (4 weeks in production vs. 18 weeks, 2 less mailed reminders and less non-response calling; but a higher incentive). The strategy of adding the sample as was approved by the PIs and they are also agreeing with the plan to wrap up data collection as soon as responses stop coming in (likely week of 4/24), delivering raw data soon after, and delivering weighted data by May 12.

Despite shorter time in field (but a higher incentive), Release 5 exceeded expectations achieving 11% completion (n = 511) vs. 8% expected which is comparable with the completion on earlier releases (11.4% - 12.5%).

Crypto Releases and invitation dates:

1: 507 11/3/2022, moved to SSL non-response follow up on 11/29
2: 2,049 11/10/2022, moved to SSL NRFU on 12/07
3 & 4: 7,684 11/15/2022, moved to SSL NRFU on 12/13
5 3/27: 4671, Invitation mailing 3/27, reminder 1 mailing 4/3
Total: 14,911

On April 24, SSL had concluded work on Crypto with exception of ad hoc follow up calls in response to emails, call-ins, etc. We plan the project celebration with iwers on Friday 4/28.

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

Sample balancing:

The sample continues to be well-balanced on key income / geo distribution and the Crypto use levels track known indices. We also analyzed differences between early and later responders with an eye on any differences among Release 5 respondents treated with the "shorter" field period. We were satisfied to observe no difference on a set of immutable attitudes and behaviors.

Finance:

Crypto continues to build underrun attributable to lower billings by staff at all levels and inability to fill the projected iwer hours. The underrun will sufficiently cover the sample augment and additional mailings. In discussions with the PI the underrun could be use to assist with the analysis.

Special Issues

Cost as of Jul 19, 2023	Total Cost to Date (direct + indirect):		552,151.39
	Est Cost at Completion (E$AC):		552,151.39
	Total Budget:		606,052.00
	Variance (Total Budget minus- E$AC):		53,900.61
	Reason for Variance:	Underrun is mostly due to savings in management and tech costs as well as not reaching the projected iwer hours. Lower actual hours allowed us to extend the lab involvement through early April and fund additional sample required to meet the goal.	
Projections as of Jul 19, 2023	Dollars Projected for Month:		0.00
	Actual Dollars Used:		3,173.55
	Variance (Projected minus Actual):		-3,173.55
	Reason for Variance:	Additional vendor PO was projected in March but paid in April.	

Measures

		Units at Complete	RR	HPI
	Current Goal:	1529	14.9%	
	Goal at Completion:	1529	14.9%	
	Current Actual:	1774	11.9%	
	Estimate at Complete:	1774	11.9%	
	Variance:			

Other Measures

Project Name	(DCUS) Daily Cannabis Use Study		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 49,742.00	**Indirect Budget:** 0.00	**Total Budget:** 49,742.00
Principal	Brady West (ISR)		
Investigator/Clients	Sean McCabe (ISR)		
Funding Agency	National Institutes of Health (NIH)		
IRB	*HUM#:* HUM00229404		*Period of Approval:* Pending
Project Team	*Project Lead:* Gary Hein		
	Budget Analyst: David Kellermeyer		
	Production Manager:		
	Senior Project Advisor: Rebecca Gatward		
	Production Manager 1: Rebecca Loomis		
	Production Manager 2:		
Proposal #	no data		
Description	This study aims to decipher the daily motives for cannabis use among light and heavy cannabis users, and their associations for longer-term use behaviors. We will recruit 50 cannabis users via the MICHR database and assign them to into groups of 25 'light' users and 25 'heavy' users based on a screener survey. Selected candidates will be asked to complete a baseline survey of about 10 or 15 minutes, 28 daily surveys of about 5 minutes, and a follow up survey of 15-20 minutes. Respondents will be paid up to $96 for participating ($2 per daily survey completion for up to 28 days, $20 for the baseline survey completion and $20 for the follow up survey completion).		
SRO Project Period	01/2023 - 06/2023		
Data Col Period	04/2023 - 06/2023		
Security Plan	Yes		

Milestones	*Pre Production Start:* 01/17/2023	*Pretest Start:*
	Pretest End:	*Recruitment Start:* 06/28/2023
	Staffing Complete:	*GIT Start:*
	SS Train Start:	*SS Train End:*
	DC Start:	*DC End:*

Other Project Team Members	Gary Hein - Project Lead Rebecca Gatward - SPA Rebecca Loomis - Project Manager Davis Kellermeyer - Budget Analyst Wen Chang - Stats lead Ji Qi - Statistician Laura Yoder - Data Manager
Other Project Name	Transitions in Daily Motives for Cannabis Use and Their Associations for Longer-Term Use Behaviors
Sample Mgmt System	Other (Manual)
Data Col Tool	Other (Qualtrics)
Hardware	[UM cell] Phone
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group
Payment Type	Other (Tango Code)
Payment Method	Other (E-mail via Tango)

Report Period	June, 2023 (DCUS)	Implementing
Risk Level	On Track	
Monthly Updates	All hours in June spent in pre-production working on: 1- Writing and submitting our second IRB Amendment, which already received approval. 2- Meetings with PIs and SRO team to discuss project updates and fielding/recruitment plans. 3- Additional programming/testing baseline, daily and follow-up surveys. 4- Rolling recruitment of respondents via MICHR database starting 6/27, and screener invitations sent to prospective respondents beginning 6/28	
Special Issues		
Cost as of Jul 19, 2023	*Total Cost to Date (direct + indirect):*	18,188.07

	Est Cost at Completion (E$AC):	32,337.43
	Total Budget:	49,742.00
	Variance (Total Budget minus- E$AC):	17,404.57
	Reason for Variance:	Differences in between proposed and projected scope:

Reason for Variance: Differences in between proposed and projected scope:

1- Project management was budgeted at the survey director level, but I'll be leading the project and I was billed a survey specialist Intermediate.
2- I'm programming all of these instruments myself, so programming hours based on specification are lower.
3- Work scope for data management is limited, so projections have been reduced in line with this scope.

Projections as of Jul 19, 2023	*Dollars Projected for Month:*	2,289.71
	Actual Dollars Used:	1,929.92
	Variance (Projected minus Actual):	359.79
	Reason for Variance:	Minor over-projections in project staff hours.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	50		
	Goal at Completion:	50		
	Current Actual:			
	Estimate at Complete:	50		
	Variance:	0		

Other Measures

Project Name	(ECHO (Year 7)) Environmental Influences on Child Health Outcomes		
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 336,908.00	**Indirect Budget:** 188,668.00	**Total Budget:** 525,576.00
Principal	Nigel Paneth (Michigan State University)		
Investigator/Clients	Michael Elliott (University of Michigan)		
	Jean Kerver (Michigan State University)		
Funding Agency	NIH		
IRB	*HUM#:* HUM00139050		*Period of Approval:* 10/2/2021-8/13/2022
Project Team	*Project Lead:* Shonda R Kruger-Ndiaye		
	Budget Analyst: William Lokers		
	Production Manager:		
	Senior Project Advisor: Evanthia Leissou		
	Production Manager 1: Ian Ogden		
	Production Manager 2: Sharon K Parker		
Proposal #	no data		
Description	The goal of ECHO is to understand pressing childhood health concerns such as autism spectrum disorders, low birth weight and childhood obesity. The project will collect survey data and a series of bio-specimens in order to assess the effects of persistent organic pollutants and heavy metals, maternal nutritional or weight status in pregnancy, and pregnancy infection and inflammation on the health of children.		
	The study includes two sample cohorts: a cohort from previous, ongoing data collection efforts as well as new sample. This existing sample cohort includes mothers and children recruited in 2011 or later for the Archive for Research in Child Health (ARCH) study in the Lansing area. The newly recruited sample cohort, MARCH (Michigan Archive for Research in Child Health), will consist of 1,100 pregnant women: 1) a statewide probability sample of 1,000 women from 20 prenatal clinics affiliated with 10 hospitals located in Ann Arbor, Dearborn, Detroit, Grand Rapids, Novi, Saginaw, Port Huron and Traverse City, and 2) 100 women from one clinic in Flint.		
	SRO's work scope is divided into two phases. During Phase 1, SRO provided assistance with prenatal questionnaire development and designed technical systems for MARCH cohort recruitment conducted by Michigan State University-employed (and other hospital-employed) interviewers and affiliated project staff. During Phase 2, SRO developed systems and is conducting data collection for MARCH sample 3-month. The MARCH age 4-5 follow up interviews and home visits are also in SRO's work scope. All other follow up protocols with the MARCH sample will be administered via REDCap by the MSU team (e.g. at 9-month, age 2 and age 3).		
	For the MARCH sample, expectant mothers are recruited during their initial prenatal visit to a healthcare provider. During a follow up phone call, respondents are asked to complete an interview about nutrition, levels of physical activity, use of healthcare services, physical and mental health, prescription medications and other substance use. In addition, women are asked to give blood samples in the first and second trimesters and urine samples in all three trimesters.		
	The sample recruitment and administration of prenatal interviews is conducted by MSU-employed (and other hospital-employed) interviewers using SRO's technical systems and laptops. SRO programmed all questionnaires administered during recruitment, the sample management system(s), and the system to keep track of the collection and storage of blood and urine samples. When babies are born, the research team obtains hospital birth records for the mother and child and a placenta sample. The first MARCH babies were born in early 2018.		
	SRO's data collection activities start after the MARCH babies are born. The first interview with the mother is done when the baby is 3-6 months old. Mothers are interviewed again by MSU when the children are 9-12 months old, and yearly after that until the child is 4 years old. When the children are 3 months old, mothers are asked to provide a child fecal sample and toenail clippings, and at age 4 they will provide shed teeth. Children from the MARCH cohort will be assessed using standardized developmental assessments at 4-5 years old. The assessments will be done during in-home visits.		
SRO Project Period	01/2017 - 08/2023		
Data Col Period	05/2018 - 08/2023		
Security Plan	NA		

Milestones		
Pre Production Start:	*Pretest Start:*	
Pretest End:	*Recruitment Start:*	
Staffing Complete:	*GIT Start:*	
SS Train Start:	*SS Train End:*	
DC Start:	*DC End:*	

Other Project Team Members	Ian Ogden: Project Manager
	Steven Sonoras: Project Manager
	Nahid Sultana: Project Manager
	William Lokers: Financial Analyst
	Jeff Smith: Technical Lead
	Mark Simonson: Data Manager (Phase 1)
	Brad Goodwin: Data Manager (Phase 2)
	Jennie Williams: Data Manager (Phase 3)
	Jeff Smith: SurveyTrak Systems Programmer
	Ashwin Dey: Systems Programmer
	Hueichun Peng: CAI Programmer-Illume
	Peter Sparks: CAI Programmer-Blaise
	Shaowei Sun: Biospecimen Logging Application Programmer
	Deb Wilson: Help Desk

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

Report Period	June, 2023 (ECHO (Year 7))	Implementing
Risk Level	On Track	
Monthly Updates	[Phase 1: Recruitment and Prenatal Surveys]	

The MARCH recruitment target was 1,110 mothers / live births. Recruitment is done and the final count is 1,113.

Prod Stats as of 7/24/23
[Phase 2: 3-Month Data Collection]

    3-month sample released: 1088
    3-month interviews completed: 791
 Average attempts / Iw: 7.6
   Iw length: 37 min
   Response Rate: 73%
   3-month biospecimen collected: 454

[Phase 3: Age 4 REDCap Survey]

   Age-4 sample released: 412
   REDCap surveys completed: 291
   Response Rate: 71%

[Phase 3: Age 4 In-Person Visit Protocols]

   Age-4 IPV sample released: 227
   In-person visits completed: 80

Special Issues

Cost as of Jul 19, 2023	***Total Cost to Date (direct + indirect):***	432,289.00
	Est Cost at Completion (E$AC):	520,670.14
	Total Budget:	525,576.00
	Variance (Total Budget minus- E$AC):	4,905.86
	Reason for Variance:	Overall costs increased as the DCO PM's hours were increased by 48 for study wrap up (and coverage during a more junior resource's vacation).
Projections as of Jul 19, 2023	***Dollars Projected for Month:***	49,747.81
	Actual Dollars Used:	52,677.01

| | **Variance (Projected minus Actual):** | | | -2,929.20 |
| | **Reason for Variance:** | | Trivial increases across lines (22 hrs over, in all). Project Lead (Shonda) charged 5 more hours than projected. DCO Admin Assistant time came in high. | |

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	See Monthly Updates		
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			

Other Measures

Project Name	**(EDC-Endline) Every Dollar Counts Endline**
Project Mode	Primary: Telephone Secondary: Face to Face Total of Modes: 2
Project Type	Sponsored Projects
Budget	**Direct Budget**: 2,382,700.00 **Indirect Budget:** 714,811.00 **Total Budget:** 3,097,511.00
Principal	Stephanie Chardoul (SRO)
Investigator/Clients	Sarah Miller (Ross Business School)
Funding Agency	
IRB	**HUM#:** HUM00164105 **Period of Approval:** 12/23/2022-12/23/23
Project Team	**Project Lead:** Karin Schneider
	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	

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

The purpose of this study is to explore how the program affects multiple dimensions of recipients' lives. Key outcomes of interest include health, subjective and material well-being, time use, financial health, labor market participation, social and civic engagement, and effects on children. SRO concluded the Baseline interviews in 2020, and the Midline interviews in July 2022. The EDC Endline project will reach out to all Baseline respondents for completion of a telephone interview, followed by an in-person interview (with cognitive tasks, anthropometric measurements and collection of dried blood spots) for those respondents still in the greater Chicago area or greater Dallas/Ft. Worth area. Data collection will take place between March 2023 and late September 2023. SRO assumes approximately 91% of the 2,990 Baseline respondents are located and willing to be interviewed again (2,720 90-minute telephone interviews).   SRO assumes that in-person interviews will be completed with 2,003 respondents still living in the greater Chicago or Dallas/Ft. Worth and Waco area. About 400 respondents are known to currently reside outside of these areas; these respondents will not be asked to complete an in-person interview. The in-person interviews will include collection of consent for administrative data collection, collection of Social Security number, completion of self-administered on-line cognitive assessments, collection of blood pressure, height, weight, and dried blood spots. We assume that 1, 957 respondents will participate in the dried blood spot collection. Following collection of the dried blood spots, SRO interviewers will package and ship the dried blood spot cards to the laboratory chosen by ORL.

• Our budget assumes up to 2,720 telephone interviews are completed and allows for at least six telephone attempts on all non-resistant cases with working telephone numbers. SRO will track and monitor contact attempts to examine the efficacy of contact windows in the first replicate of the sample.

• The budget assumes approximately 2,003 cases complete the in-person component and 1,957 consent to the DBS collection.

• Mileage costs for fieldwork are budgeted at 2,003 trips of no more than 120 miles per round trip.

• Cash incentives of $15,000 are included in the budget estimate to facilitate in-person payments to reluctant and hard-to-reach participants and individuals who are asked to assist in the location of these participants. All other participant incentive payments are the responsibility of Open.

• Supplies/kits for DBS are included in the estimate consistent with our most recent project experience. Further discussion with the University of Washington laboratory may result in the refinement of the materials and method for drying the bio specimens and associated costs of project supplies.

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

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

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

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

Milestones			
	Pre Production Start: 09/01/2022	*Pretest Start:*	
	Pretest End:	*Recruitment Start:* 02/01/2023	
	Staffing Complete: 02/27/2023	*GIT Start:*	
	SS Train Start: 03/20/2023	*SS Train End:* 03/24/2023	
	DC Start: 03/27/2023	*DC End:* 08/19/2023	

Other Project Team Members	In addition to the above: Ian Ogden (SSS, Tech Coordinator); Anna Fuqua-Smith (SSI); Austin De Spirito (SSA); Jeff Smith (Tech Lead); Marsha Skoman (SurveyTrak); Heuchun Peng and Shaowei Sun (Self-Scheduler); Peter Sparks & Kelly Liesko (Blaise); Stephanie Windisch and Jennie William (Data Management); Ashwin Dey and Darnell Franklin (Webtrak, Weblog, Reports)
Other Project 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	June, 2023 (EDC-Endline)	Implementing
Risk Level	On Track	
Monthly Updates	We continue to use fewer interviewer hours than projected. FtF follow up has begun but even with one long-distance and several mid-distance travelers, it is unlikely we will use up projected hours.	
Special Issues	None. NIH portion of grant was eventually awarded with a 25% cut and approximately four months after we would have needed to have notification to resume development of technical systems. PI looking for other means of collection of DBS.	

Cost as of Jul 12, 2023		
	Total Cost to Date (direct + indirect):	957,082.72
	Est Cost at Completion (E$AC):	1,478,087.63
	Total Budget:	3,097,511.00
	Variance (Total Budget minus- E$AC):	1,619,423.37
	Reason for Variance:	See previous months' descriptions. We will not implement in-person data collection of any physical measures or DBS.

Projections as of Jul 12, 2023	*Dollars Projected for Month:*	254,805.62
	Actual Dollars Used:	219,805.48
	Variance (Projected minus Actual):	35,000.14
	Reason for Variance:	Projections too generous.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	2875	95	3.0
	Goal at Completion:	2875	95	3.0
	Current Actual:	2645	89	2.6
	Estimate at Complete:	2875	95	2.8
	Variance:			

Other Measures

Project Name	(HART) Health, Aging, and Retirement in Thailand (HART) - SRO consultation (2023)		
Project Mode	Primary: Not Available		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 55,460.00	**Indirect Budget:** 16,083.00	**Total Budget:** 71,543.00
Principal Investigator/Clients			
Funding Agency			
IRB	**HUM#:** NA		**Period of Approval:**
Project Team	**Project Lead:** Nicole G Kirgis		
	Budget Analyst: Dean E Stevens		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1: Rebecca Gatward		
	Production Manager 2:		
Proposal #	no data		
Description	SRO to provide consultation and guidance on components of the Health, Aging, and Retirement in Thailand wave 5 data collection. SRO assisted the Center for Aging Society Research in the transition from PAPI to CAPI data collection for HART wave 2 in 2016-18. For wave 3 and 4, HART used QuestionPro for data collection. The study is now interested in SRO's consultation and guidance on returning to Blaise for the questionnaire and SurveyTrak and WebTrak for sample and production management. The budget covers time for the following: - consultation on the preparation of technical systems for wave 5 - including liaising with Statistics Netherlands on licensing and the use of Blaise, - assisting with training on sample design and implementation and sample weighting, including handling attrition and - consult and training on data management, specifically managing the data structure of panel data and preload. Two 'learning by doing' training trips will take place. Trip one: U-M Team to Hart (April 2023) involving a SRO data manager and Blaise programmer will travel to Thailand to work with the HART team. Trip two: HART team to U-M to take place between 8 - 29 September 2023 (originally planned for August). This visit will focus on the technical side of field survey management, programming, sampling and weights (including suggestions for sample design enhancements for Wave 5) and data management using HRS and HART as case studies.		
SRO Project Period	01/2024 - 10/2023		
Data Col Period			
Security Plan	NA		

Milestones	**Pre Production Start:**		**Pretest Start:**	
	Pretest End:		**Recruitment Start:**	
	Staffing Complete:		**GIT Start:**	
	SS Train Start:		**SS Train End:**	
	DC Start:		**DC End:**	

Other Project Team Members	Karl Dinkelmann Jennie Williams Marsha Skoman David Bolt Raphael Nishimura Sarah Broumand
Other Project Name	HART wave 5
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	June, 2023 (HART)	Implementing
Risk Level	On Track	
Monthly Updates	June Dates for HART team visit to SRO are 8 - 29 September. We have provided some suggestions for accommodation in Ann Arbor and Invitation letters for team members to support Visa applications - yet to hear if they have booked	

accommodation and/or flights.
Next steps: Create agenda for the visit in consultation with the HART Project Manager.

Special Issues

Cost as of Jul 12, 2023	*Total Cost to Date (direct + indirect):*		23,989.86
	Est Cost at Completion (E$AC):		67,966.23
	Total Budget:		71,543.00
	Variance (Total Budget minus- E$AC):		3,576.77
	Reason for Variance:	Salary hours projected for June were not used - these will be needed in September and will be rolled forward.	
Projections as of Jul 12, 2023	*Dollars Projected for Month:*		3,235.71
	Actual Dollars Used:		1,459.98
	Variance (Projected minus Actual):		1,775.73
	Reason for Variance:	Hours projected for Karl, Jennie and Rebecca in June were not all used (these will be rolled forward to September so they are available to be used during the HART team visit).	

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

Other Measures

Project Name	(HCAP 2022) Healthy Cognitive Aging Project, 2022		
Project Mode	Primary: Face to Face Secondary: Telephone		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 3,300,000.00	**Indirect Budget:** 1,188,000.00	**Total Budget:** 4,488,000.00
Principal	Kenneth Langa (SRC)		
Investigator/Clients	David Weir (SRC)		
Funding Agency			
IRB	*HUM#:* HUM00099822		*Period of Approval:*
Project Team	*Project Lead:* Maureen Joan O'Brien		
	Budget Analyst: Richard Warren Krause		
	Production Manager: Margaret Lavanger		
	Senior Project Advisor: Evanthia Leissou		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	This project will involve the completion of a face-to-face CAPI interview, designed to provide a dementia assessment of HRS respondents. A sample of 5000 respondents (one per household) who are 65 years of age or older will be selected for this effort. The questionnaire is a series of 15 cognitive tests and will be administered to respondents after the HRS 2022 interview has been completed. The sample will not be clustered geographically; it will be selected randomly. It is expected that the field team will carry out well-planned regional trips in order to complete the 3,530 in-person interviews. An informant interview will also be completed for each of the respondents interviewed. The respondent questionnaire length is expected to be 60 minutes. The informant questionnaire is expected to be 20 minutes and can be administered in-person after the R interview, or by telephone/mail if FTF is not available.		
SRO Project Period	01/2022 - 12/2023		
Data Col Period	07/2022 - 09/2023		
Security Plan	NA		

Milestones	*Pre Production Start:* 04/01/2022	*Pretest Start:* 05/01/2020
	Pretest End: 05/21/2020	*Recruitment Start:*
	Staffing Complete:	*GIT Start:*
	SS Train Start: 07/13/2022	*SS Train End:* 07/15/2022
	DC Start: 07/18/2022	*DC End:* 10/31/2023

Other Project Team Members	PDMG: Tony Romanowski, Lisa VanHavermaet, Megan Hromco, Kristen Cross. TSG: Jeff Smith, Brad Goodwin, Valyn Dall, Peter Sparks, Ashwin Dey, Deb Wilson
Other Project Name	Harmonized Cognitive Assessment Protocol
Sample Mgmt System	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop; [UM cell] Phone
DE Software	Blaise 4.8 BIA
QC Recording Tool	NA
Incentive	Yes, R; Yes, INF
Administration	NA
Payment Type	Check, prepaid (50); Cash, post (25)
Payment Method	Check through STrak RPay System

Report Period	June, 2023 (HCAP 2022)	Implementing
Risk Level	On Track	
Monthly Updates	The four trained interviewers from the 6/20-6/22 Iwer training are now in the field and completing interviews. We have lost one interviewer, so are at 27 Iwers currently. HCAP production has been underway for 51 weeks. As of this morning, 4,314 interviews have been completed, including 2,308 R and 2,006 Inf. There are currently 221 appts (141 R, 80 Inf). The overall HPI is 4.72. 270 Spanish interviews have been completed (174 R, 126 Inf). Count and RR goals have been updated to reflect 190k in funds to be allocated for the production scenario estimated to result in a 64% RR. This includes the additional Iwer training as well as the extension. The original RR goal was 71%. Additionally, HRS is estimating a lower RR (70%) so less sample will be available to HCAP (~4,200) . HRS will extend data collection through August, 2023, so HCAP will extend another 4 weeks until the end of November. HCAP goals have been adjusted to reflect the 4,200 sample size from HRS. Currently in CRS is the approved budget of an 190k overrun in which Iwer hours now decrease significantly in November. We will still	

likely meet and even exceed HCAP RR and iw count goals as outlined in Scenario 2 that was approved by the PI.

We have created another cost to close scenario in which Iwer hours do not decrease significantly through November, and will present this to the PI next week. The budget analyst is working on calculating the additional cost for this scenario and this will be presented to the PI next week.

239 new sample lines have been released into the field this week. We expect to release sample two more times, and expect approximately 400 total more sample lines to be available for HCAP.

During the last few months of production we will closely monitor subgroup RRs, including Proxy, Black, and Hispanic. During this time we may introduce strategies to boost RRs for these groups, including increased incentives and outlier trips. We are currently summarizing the status of all Proxy sample so this can be provided to the PI to support a decision to increase effort for Proxy sample.

Survey Techs from the SSL have been assisting with data entry of Brave Man booklets that are done on paper and pencil in the field, then sent to Ann Arbor for logging and entry. We are not caught up on data entry so do not expect to require Survey Tech assistance from this point forward. We are also caught up on logging of paper forms. Additional QC is still being done for the 4 new interviewers from the June training.

Special Issues	Production training and production launch were postponed to Summer, 2022 due Covid19 pandemic. We are projecting an overrun due to the inflation over 2-year delay, continued low-level management over this 2 years, increased sample size between 2020 and 2022, and a budget cap in 2020.

Cost as of Jul 21, 2023	Total Cost to Date (direct + indirect):		3,514,033.86
	Est Cost at Completion (E$AC):		4,747,005.06
	Total Budget:		4,488,000.00
	Variance (Total Budget minus- E$AC):		-259,005.06
	Reason for Variance:	There was a budget cap in 2020 while goals remained at high level, project has stretched 2 additional years with low level of management, inflation since budget created in 2018. The PI has approved a direct cost overrun of $190,000.	

Projections as of Jul 21, 2023	Dollars Projected for Month:		321,451.25
	Actual Dollars Used:		288,584.02
	Variance (Projected minus Actual):		32,867.23
	Reason for Variance:	Respondent costs not used this month, pushed forward, plus low Iwr hours - those are pushed forward as well.	

Measures		Units at Complete	RR	HPI
	Current Goal:	4311		4.8
	Goal at Completion:	5398	64%	4.8
	Current Actual:	4314	58%	4.72
	Estimate at Complete:	5519	69%	
	Variance:			

Other Measures	Iw counts include R + Inf. RRs include Rs only. At this point, 83% of Rs have a corresponding Inf iw. We expect ~88% of Rs to have a corresponding Inf iw at the end of data collection.

Project Name	(Health and Well Being in SE MI) Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan)		
Project Mode	Primary: Face to Face Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 2,409,055.00	**Indirect Budget:** 1,349,072.00	**Total Budget:** 3,758,127.00
Principal	Kristine Ajrouch (Life Course Development Program, SRC)		
Investigator/Clients	Toni Antonucchi (Life Course Development Program, SRC)		
	Laura Zahodne (Life Course Development Program, SRC)		
Funding Agency			
IRB	**HUM#:** HUM00146040		**Period of Approval:** 4/9/2020
Project Team	**Project Lead:** Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Taghreid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 600 interviews with recently identified Arab Americans aged 65 or older residing in Southeast Michigan and 330 interviews with Social Relations sample members aged 65 or older. The Arab American sample will be selected based on an in-person household screening. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements. Social Relations respondents will only complete the cognitive interview. An informant interview will also be conducted for all sample members. Interviews will be conducted in English or Arabic.		
SRO Project Period	05/2019 - 03/2023		
Data Col Period	05/2023 - 03/2024		
Security Plan	No		

Milestones			
Pre Production Start: 12/01/2022		**Pretest Start:**	
Pretest End:		**Recruitment Start:** 02/01/2023	
Staffing Complete: 04/10/2023		**GIT Start:** 05/16/2023	
SS Train Start: 05/18/2023		**SS Train End:** 05/25/2023	
DC Start: 05/30/2023		**DC End:**	

Other Project Team Members	Taghreid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall
Other Project Name	Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan)
Sample Mgmt System	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop; [UM cell] Phone; Paper and Pencil
DE Software	Other (Weblog)
QC Recording Tool	DRI-CARI; Camtasia
Incentive	Yes, R; Yes, INF
Administration	SRO Group
Payment Type	Cash, prepaid ($75 respondent, $25 informant); Other ($2 screener incentive)
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)

Report Period	June, 2023 (Health and Well Being in SE MI)	Implementing
Risk Level	Some Concerns	
Monthly Updates	During June 2023, SRC activities on the DAWN projects included the following: Task 1: Management, Budget and Work Plan • Held meetings with the DAWN research team to discuss study planning, budget, scope and schedule for D-Amp and SRS. • Financial o Prepared cost reports and reviewed monthly expenses. o Finalized projections and entered them into the cost reporting system • Technical systems & Questionnaires o Updated and finalized Arabic main questionnaire and respondent booklet, Arabic Informant questionnaire and respondent booklet. ? Reviewed translation items, provided feedback to the research team. ? Re-created the Arabic QxQ for the Informant questionnaire to resolve formatting/display issues. ? Updated Arabic Informant Respondent Booklet	

o Conducted repeated rounds of testing on all instruments and on the sample management systems
o Finalized specification to the screener application to incorporate UMTRI 65+ flag.
o Continued updates to English Proxy questionnaire specification. Began updating Arabic proxy questionnaire specification.
• July Training preparation
o Modified study-specific training agenda for team leader training, train-the-trainer, and interviewer training.
o Updated powerpoint presentations.
o Began updates to project manual.
• Production preparation
o Inventoried supplies remaining from May training.
o Order supplies for July interviewer training.

Task 2: Sampling
• Reviewed revised specification for screener
• Programmed dashboards for production monitoring
• Provided release 2 address files to production management team.

Task 3: Questionnaire Development
• See Task 1 for activities completed by the management team
• Conducted repeated rounds of testing on all instruments

Task 4: CAI Programming
• Began programming on Arabic instruments.

Task 5: Systems Programming
• Conducted continued rounds of testing/bug fixes to all sample management instruments
• Began preparation of systems for quality control. Fixed bugs in quality control systems preventing sample from loading into the quality control system. Updated data.
• Programmed, tested and finalized field progress reports.

Tasks 6, 7: Interviewer Recruitment & Hiring, Training
• Facilities
o Finalized contract for July training
o Conducted outreach to facility to update specifications for audio visual equipment for July training
• Processed personnel paperwork for interviewers who left from (resigned from) the May training cohort
• Interviewer recruitment for July
o Evaluated applications, conducted 1st, 2nd interviews for interviewer positions; conducted bilingual certification interviews
o Made offers to selected candidates, processed hiring paperwork and requested background checks.
? 46 interviewers hired for July, including 4 certified bilinguals (2 additional not yet certified).
• Training
o Conducted debriefing on May training
o Began work to review the July training agenda

Task 8: Main Data Collection
• Responded to incoming email from respondents, logged returned mail
• Logged/checked returned cognition packages
• Fulfilled supply requests from field
• Through June 30, 2023:
o Screener Completions:

	High MENA	Low MENA
Selected for D-Amp	24	0
Selected for SRS	12	106
Eligible, Not Selected	188	0
Not Eligible	10	19
Non-Sample	0	9

o D-AMP – 2 completed main interviews, 1 completed informant interview
o Social Relations – 45 completed interviews

Task 9: Post Collection Processing
• No activity this month

Task 10: Weighting
• No activity this month

Task 11: Final Data Deliverables
• No activity this month

Special Issues	Areas Needing Special Attention

We are not getting enough hours or production effort from interviewers to move production forward. Interviewers are hesitant to work resistant lines. While some new sample lines have been generated since early June, the number is small and many lines are very resistant to participating. High attrition has also hurt the production effort. The current recruitment and training in July 2023 has also experienced very high attrition. A third training will likely be needed.

• Production Interviewing – production screening and interviewing is proceeding more slowly than anticipated due to a lower number of interviewers completing training and lower than anticipated hours from interviewers. Hours per screener, hours per interview are currently higher than budgeted.
o The production management team is actively working with interviewers to ensure they work the required number of hours and work sample lines efficiently and effectively
o Participation in saliva collection is higher than anticipated. While it is still too early to make predictions about the entire study, this is an area to watch as it could result in higher costs due to the need to order more supplies, and on the research side, pay for more samples to be processed.
• Financial:
o SRO is carefully monitoring programming progress and cost. Some line items currently have slack that will be able to absorb modest overruns on other line items.
? Blaise programming will be higher than budgeted due to the complexity of launching the electronic consent forms, addition of the consent process programming, and changes to the questionnaire which involved re-working a majority of the skip patterns and respondent booklet references.
? SurveyTrak programming will be higher than budgeted due to the unexpected complexity of the screener project programming, which generates sample lines for two studies. It has also been more difficult than anticipated to resurrect programming from 2019/2020 and update to the most current version of SurveyTrak.
• Interviewer Attrition
o The project hired 28 interviewers for the May training, but is experiencing substantial attrition prior to and during training. This level of attrition is similar to that being experienced by other SRO projects and also by other survey research firms. Reasons for attrition include finding full-time employment with benefits, family or personal emergencies, or unexplained drops. 15 interviewers were fully certified, and 2 were certified for screening only. One interviewer resigned before production started on May 30, leaving 14 certified interviewers with two screening interviewers.
• Schedule
o Programming is running behind schedule due to issues noted above.
? Priority is being given to launching the screener (English & Arabic), and the main survey, physical measures and cognition sections in English, as well as the informant questionnaire in English.
? The Arabic version of the main questionnaire, informant interview and the proxy questionnaire (English & Arabic) will not be ready for the May 30 study launch. We will advise as soon as feasible on a possible launch date.

Cost as of Jul 22, 2023	Total Cost to Date (direct + indirect):		1,531,516.98
	Est Cost at Completion (E$AC):		3,730,326.78
	Total Budget:		3,758,127.00
	Variance (Total Budget minus- E$AC):		1,436.02
	Reason for Variance:	The projected underrun is insignificant.	
Projections as of Jul 22, 2023	Dollars Projected for Month:		272,162.38
	Actual Dollars Used:		204,219.73
	Variance (Projected minus Actual):		67,942.65
	Reason for Variance:	The monthly variance can be attributed to the late start of quality control efforts (surveytech hours were not charged as anticipated). Training hosting were projected but did not get expensed during June (we have yet to receive an invoice from the May training). Interviewers are not working projected hours due to vacations or low effort. The extremely slow pace of interviewing and screening also means that R payments and travel projected were not used.	

Measures		Units at Complete	RR	HPI
	Current Goal:	930 main, 930 inf	varies	11.65 w/screen, inf
	Goal at Completion:	930 main, 930 inf		
	Current Actual:	2 Main, 1 IF		Over 200 HPI
	Estimate at Complete:			
	Variance:			

Other Measures

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:* 6/7/2023-6/6/2024
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 - 12/2023		
Data Col Period	03/2022 - 08/2023		
Security Plan	NA		

Milestones	*Pre Production Start:* 01/01/2021	*Pretest Start:* 11/01/2021
	Pretest End: 11/23/2021	*Recruitment Start:* 08/01/2021
	Staffing Complete: 01/15/2022	*GIT Start:* 02/21/2021
	SS Train Start: 02/23/2022	*SS Train End:* 03/03/2022
	DC Start: 03/07/2022	*DC End:* 06/30/2024

Other Project Team Members	Derek Dubuque (Production Manager), Theresa Camello (Production Manager), Alex Warju (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), Cindy Huang (Budget Analyst)

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, Brianna Sabol

Coding Lead: Carolyn Vieira-Martinez |
Other Project Name	HRS 2022 Main Iws
Sample Mgmt System	SurveyTrak; MSMS
Data Col Tool	Blaise 5; SAQ
Hardware	Laptop; [UM cell] Phone; Paper and Pencil
DE Software	Other (Blaise 5 Coding Application); External vendor (DataForce)
QC Recording Tool	Camtasia
Incentive	Yes, R; Yes, INF
Administration	NA
Payment Type	Check, prepaid ($80 (Panel)); Check, post ($50 (WBD)); Cash, post ($20 (SAQ), $100 (Baselines))
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	June, 2023 (HRS 2022 Panel & Baselines)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Throughout the month of June, - The project team has been working on production monitoring, cost monitoring, sample management, logging, weekly mailings (SSA and SAQ), payment and letter request processing. - Limited effort protocol continues with minimal impact to the field staff (1,255 SIDs pulled from field as of 7/21/23).	

	- Priority/Increased token flagging of Panel and EgenX sample and non-priority Panel eFTF mode switch protocols continued. As of 7/21/23, 33% of the 3,008 high priority cases have completed an interview; 15% of the 1,757 Panel eFTF mode switch cases have completed an interview.	

- Throughout the month of June, the field staff directive was to make at least 2 to 3 attempts per week on priority panel sample, at least 1 attempt per week on non-priority panel sample, reducing screening efforts to one call window per week. Field managers are still working with interviewers who are not meeting production goals.
- HRS Exec approved extending 2022 Panel production through August and are discussed responsive design options for non-priority sample.
- DMSS made updates to reports.

*As of 7/21/23, the "measures" table reflects both Panel and Baseline combined.

Special Issues	- Concerns about meeting Panel interviewing goals even with the additional five months of field time due to current interviewer count and balancing effort with new cohort screening/baseline iws. Project team is working with the client on responsive design options and realistic panel response rate expectations, as well working with the field staff on sample management strategies. As of 7/21/23, we need approximately 1,100 panel interviews to the reach a revised 69% RR goal (original RR goal 74%). - Multiple Blaise issues that have impacted STrak and MSMS throughout data collection. - Competing project team demands with HRS 2022 in data collection at the same time as 2023 mail surveys and HRS 2024 preproduction. - Approximately 20% of field staff are on performance improvement plans most of whom are from the April 2023 training (almost 50% of the April trainees).
Cost as of Jul 19, 2023	*Total Cost to Date (direct + indirect):* 16,264,791.42
	Est Cost at Completion (E$AC): 18,401,616.90
	Total Budget: 19,016,630.00
	Variance (Total Budget minus- E$AC): 615,013.10
	Reason for Variance: The change in variance between May and June Panel cost reports is due to regular staff hours and non-salary coming in under projections during the month of June. Projections are being updated as this variance is not an accurate reflection of estimated cost at complete (Interviewer rate increases pending). Summary for the wave: CRS is projecting the contingent fringe benefits with the newly approved 10.4% rate to accommodate ACA costs, the $400 signing bonus for field staff, Field interviewer and SurveyTech base rate increase, an extra day added to February production training, the increase in per mile reimbursement for travel. CRS is now using the actual Iwer rates for projecting Iwer costs and travel projections were removed from the recruitment task. The Casic recharge rate and Field Ops rate increases, increased mileage costs for remaining interviews, the Field Iwer and SurveyTech rate increases have been updated in CRS, the increase in recharges to the Iwer-Trainee hours as well as the reduction in the CAPI rate. The additional interviewer hours needed to reach panel interview goals have been applied to CRS.
Projections as of Jul 19, 2023	*Dollars Projected for Month:* 1,080,486.75
	Actual Dollars Used: 876,486.85
	Variance (Projected minus Actual): 203,999.90
	Reason for Variance: The primary reason for variance was regular staff hours charged were significantly less than what had been projected. Field interviewer hours charged were also under projections. Non-salary costs for respondent payments, travel, and vendor fulfillment were also under projections. Future projections are in process of being updated.

Measures		Units at Complete	RR	HPI
	Current Goal:	15,304	54%	10.5
	Goal at Completion:	22,617	69%	8.2
	Current Actual:	15,223	54%	10.4
	Estimate at Complete:	22,617	69%	9.6
	Variance:	0	0	1.4

Other Measures	Panel: Goal RR: 69%, Current RR: 63.7% (Panel end date 8/31/23) 2022 Baselines generated from screener: Goal RR: 44%, Current RR: 19.2% 2019 EGenX baselines: Goal RR: 70%, Current RR: 67.8%

Project Name	**(HRS 2024) Health and Retirement Study 2024**		
Project Mode	Primary: Mixed Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	**Direct Budget:** 603,986.00	**Indirect Budget:** 217,435.00	**Total Budget:** 821,421.00
Principal	David Weir (ISR-SRC)		
Investigator/Clients			
Funding Agency			
IRB	**HUM#:** HUM000611128		**Period of Approval:** 6/7/2023-6/6/2024
Project Team	**Project Lead:** Evanthia Leissou		
	Budget Analyst: Richard Warren Krause		
	Production Manager: Andrea Sims		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Derek Dubuque		
	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	05/2023 - 08/2025		
Data Col Period	04/2024 - 05/2025		
Security Plan	NA		

Milestones	**Pre Production Start:** 05/15/2023	**Pretest Start:** 01/25/2024
	Pretest End: 02/10/2024	**Recruitment Start:**
	Staffing Complete:	**GIT Start:** 03/22/2024
	SS Train Start: 03/24/2024	**SS Train End:** 03/29/2024
	DC Start: 04/01/2024	**DC End:** 05/31/2025

Other Project Team Members	Alex Warju (Production Manager), Deborah Zivan (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), Austin De Spirito (Project Assistant), Cindy Huang (Budget Analyst) 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, Brianna Sabol
Other Project Name	HRS 2024 Panel
Sample Mgmt System	SurveyTrak; MSMS
Data Col Tool	Blaise 5; SAQ
Hardware	Laptop; [UM cell] Phone; Paper and Pencil
DE Software	Other (Blaise 5 Coding Application); External vendor (DataForce)
QC Recording Tool	Camtasia
Incentive	Yes, R; Yes, INF
Administration	NA
Payment Type	Check, prepaid (100.00); Check, post ($50 (WBD), $20 (SAQ))
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office

----

Report Period	June, 2023 (HRS 2024)	Initiation
Risk Level	On Track	
Monthly Updates	HRS 2024 preproduction activities continued with focus cost projections, technical specifications, and technical development. *Milestone dates are tentative.	
Special Issues	Resource (Regular and Field Staff) concerns for HRS 2024 preproduction and production while HRS 2022 data collection and HRS mail surveys are in production. Session database issues needing to be addressed/resolved by CBS for HRS 2024. Meeting scheduled with CBS for July to discuss further.	

Cost as of Jul 19, 2023	*Total Cost to Date (direct + indirect):*		19,082.51
	Est Cost at Completion (E$AC):		821,188.86
	Total Budget:		821,421.00
	Variance (Total Budget minus- E$AC):		232.14
	Reason for Variance:	Minimal variance. The HRS 2024 budget is for preproduction efforts through December 2023. Will update the total budget once the 6 year renewal proposal is reviewed/approved/awarded.	
Projections as of Jul 19, 2023	*Dollars Projected for Month:*		21,784.25
	Actual Dollars Used:		14,461.62
	Variance (Projected minus Actual):		7,322.63
	Reason for Variance:	Variance due to fewer staff hours than originally projected primarily due to staff ooto time. Future projections have been adjusted.	

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:			
	Goal at Completion:		70%	
	Current Actual:			
	Estimate at Complete:			
	Variance:			

Other Measures

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	*Pre Production Start:*		*Pretest Start:*
	Pretest End:		*Recruitment Start:*
	Staffing Complete:		*GIT Start:*
	SS Train Start:		*SS Train End:*
	DC Start:		*DC End:*

Other Project Team Members			
Other Project Name	HRS Historical Coding		
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	Desktop		
DE Software	Other (Coding Application)		
QC Recording Tool	NA		
Incentive	Not used		
Administration	N/A		
Payment Type	N/A		
Payment Method	N/A		

Report Period	June, 2023 (HRS HOC)	Planning
Risk Level	On Track	
Monthly Updates	During the month of June, - Jeannie participated in and scheduled meetings with the PI and budget analyst - Variable table work is expected to move forward over the next 2 weeks with significant progress expected. Work transferred from HRS Staff member, Tom Blackburn, to (largely) Qize Chen due to Tom's availability. SRO coding activities expected to begin September 2023.	
Special Issues	- Delay of original coding work scope to now begin in September 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 Jul 19, 2023	*Total Cost to Date (direct + indirect):*	19,834.26
	Est Cost at Completion (E$AC):	85,259.24
	Total Budget:	92,157.06
	Variance (Total Budget minus- E$AC):	6,897.82
	Reason for Variance:	Variance is due salary as a result of moving Stan Hasper's hours to

Carolyn Vieira-Martinez and fewer project management hours needed for coordinating with HRS staff during the planning phase.

Projections as of Jul 19, 2023	Dollars Projected for Month:		1,287.42
	Actual Dollars Used:		619.44
	Variance (Projected minus Actual):		667.98
	Reason for Variance:	Not as much project management that was projected has been needed at this point in the planning phase. Due to initial project delay and further delay with HRS (ISR) staff, coding hours have not been utilized. Coding to begin in Sept 2023 so unused hours for project management, system set up, and coding will be pushed forward.	

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

Other Measures

Project Name	(HRS2022-Screening) HRS 2022 - Screening		
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 21,264,149.00	**Indirect Budget:** 7,655,093.00	**Total Budget:** 28,919,242.00
Principal	David Weir (SRC)		
Investigator/Clients	Helen Levy (SRC)		
	Ken Langa (SRC)		
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Evanthia Leissou		
	Budget Analyst: Richard Warren Krause		
	Production Manager:		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Andrew L Hupp		
	Production Manager 2: Theresa Camelo		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample.		
SRO Project Period	02/2021 - 01/2024		
Data Col Period	03/2022 - 01/2024		
Security Plan	NA		

Milestones	*Pre Production Start:*	*Pretest Start:*
	Pretest End:	*Recruitment Start:*
	Staffing Complete:	*GIT Start:*
	SS Train Start:	*SS Train End:*
	DC Start: 04/19/2022	*DC End:*

Other Project Team Members	
Other Project Name	
Sample Mgmt System	SurveyTrak; MSMS; Other ((Blaise) Case Management App (CMA))
Data Col Tool	Blaise 5
Hardware	Laptop; [UM cell] Phone; Paper and Pencil
DE Software	Other (Blaise 5 web instrument); N/A
QC Recording Tool	Camtasia; N/A
Incentive	Yes, R; Yes, INF
Administration	SRO Group
Payment Type	Check, post; Cash, prepaid ($2); Cash, post
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office

----

Report Period	June, 2023 (HRS2022-Screening)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Batch 5 sample were sent their web invitations on 07/07. The limited access/safety/work permit cases from the first four batches were sent an endgame letter on 06/28. To-date only 1.1% of cases completed a web screener (we can't have interviewer follow-up with these cases. Implementation of the endgame strategy for cases based on effort is on hold for the moment. The PIs want to change the amount of effort to be eligible for the endgame on the pre-ID cases. The want twelve in-person attempts for pre-id cases. The fresh sample will remain at six in-person attempts.

The focus of the majority of time for most staff is on completing the panel. Panel work has been extended through August which will slow screening considerably until the fall. We have begun returning cases to the field for additional effort to either be completed or reach the eligibility for the endgame strategy. We have also returned some endgame cases in a few areas to keep screening staff with sample.

We have been hitting the production goals for several weeks now. We've lowered the goals given the reduction in screening hours and are currently still meeting the goals. | |

SRO and sampling team have been working together on the sample design. The MOC strata were subsampled for the Batch 5 release as we are doing well with MOC recruitment. After a discussion with the sampling team and the PIs we will be sorting addresses (and possibly listing) ~350 segments in the reserve sample. We will do that work later in the fall.

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

Special Issues		
Cost as of Jul 19, 2023	*Total Cost to Date (direct + indirect):*	13,254,596.29
	Est Cost at Completion (E$AC):	27,243,068.20
	Total Budget:	28,919,242.00
	Variance (Total Budget minus- E$AC):	1,676,173.80
	Reason for Variance:	Projections are in the process of being updated.
Projections as of Jul 19, 2023	*Dollars Projected for Month:*	1,740,388.83
	Actual Dollars Used:	1,549,466.84
	Variance (Projected minus Actual):	190,921.99
	Reason for Variance:	The largest contributors to the variance were salary (unused hours), and spending less in unused respondent payments. These costs were pushed forward.

Measures		Units at Complete	RR	HPI
	Current Goal:	3,600/1,500 HHs	73%	3.0
	Goal at Completion:			
	Current Actual:	2,029/2,100	35.6%	4.25
	Estimate at Complete:			
	Variance:			

Other Measures

Project Name	**(IHDS3) India Human Development Survey Wave 3**
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects
Budget	**Direct Budget**: 437,285.61 **Indirect Budget:** 208,822.92 **Total Budget:** 646,108.53
Principal	Sonalde Desai (University of Maryland)
Investigator/Clients	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		
Pre Production Start:		***Pretest Start:***
Pretest End:		***Recruitment Start:***
Staffing Complete:		***GIT Start:***
SS Train Start:		***SS Train End:***
DC Start:		***DC End:***

Other Project Team Members	Project Management Team Stephanie Chardoul -- Senior Project Advisor (SPA) Sarah Broumand - Project Manager Programming Team Collette Keyser - Blaise Marsha Skoman - SurveyTrak Holly Ackerman - WebTrak Cheng Zhou - Sync HelpDesk Team Emmanuel Ellis John Data Manager Team Sarah E Jennie
Other Project Name	
Sample Mgmt System	Other (SurveyTrak INTL)
Data Col Tool	Blaise 5
Hardware	Laptop; Other (NCAER Phone (In India))
DE Software	Other (TBD)
QC Recording Tool	DRI-CARI
Incentive	Yes, Other (TBD)
Administration	Other (TBD)
Payment Type	Other (TBD)
Payment Method	Other (TBD)

Report Period	June, 2023 (IHDS3) Implementing

Risk Level	On Track

Monthly Updates	New funding for May through November has finally been approved and received. NCAER has decided to launch multiple trainings in parallel to accelerate the process. This has required the data manager to have to create up to TWO TRAIN and PROD projects for both HH and COMM projects almost monthly. The plan to not update all agencies with the latest data models has helped reduce the time SRO needs to setup merge migrations for all those data models. SRO is also in the process of preparing an estimate for additional support after November. NCAER thinks they may only need support until end of January and possibly more. Overall for the volume of data models (21 per project) and projects (21 to date), the instances of surveytrak issues and data recovery are very small. This is a testament of good planning and extensive testing that was done prior to production by both NCAER and SRO staff.

Special Issues	Wave 3 funding balance ended at -$18,833.61 direct and indirect costs (-$12,072.53 Direct))

Cost as of Jul 21, 2023	*Total Cost to Date (direct + indirect):*	587,181.64
	Est Cost at Completion (E$AC):	661,870.03
	Total Budget:	646,108.53
	Variance (Total Budget minus- E$AC):	-15,761.50
	Reason for Variance:	This variance is from the previous proposal where SRO agreed to pay the overdraft. Current proposal is on target.

Projections as of Jul 21, 2023	*Dollars Projected for Month:*	10,788.31
	Actual Dollars Used:	8,480.13
	Variance (Projected minus Actual):	2,308.18
	Reason for Variance:	Hour estimated include unexpected problems, so these may vary month to month. The dollars will be carried forward for the next MPR period.

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

Other Measures	

Project Name	**(LHMS 2023 Spring) Life History Mail Study Spring 2023**		
Project Mode	Primary: Mail Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget:** 293,540.00	**Indirect Budget:** 164,382.00	**Total Budget:** 457,922.00
Principal	David Weir (SRC)		
Investigator/Clients	Jaqui Smith (SRC)		
Funding Agency	NIH		
IRB	**HUM#:** HUM00229404		**Period of Approval:** 11/4/2022-11/3/2023
Project Team	**Project Lead:** Gary Hein		
	Budget Analyst: Cindy Tsao		
	Production Manager: William Keating		
	Senior Project Advisor: Evanthia Leissou		
	Production Manager 1: Deborah Zivan		
	Production Manager 2: William Keating		
Proposal #	no data		
Description	The HRS Life History Mail Survey (LHMS) is part of the Health and Retirement Study. The goal of LHMS is to collect retrospective life histories of HRS participants to address multidisciplinary need for information about events, residential location, and education over the entire life course. Information like this allows researchers to understand how individuals' pasts shape their health and economic situations today. A paper questionnaire will be mailed to a sample of approximately 2,288 HRS Respondents. From this sample, approximately 1,242 completed surveys are expected (54% response rate). For the reminder protocol, 495 respondents have been designated to receive a reminder by postcard. The remaining 1,793 respondents will receive reminders by phone to complete the questionnaire. When a respondent is reached by phone, SRO will attempt to complete the 60-minute interview by telephone. Thank you postcards will be mailed to respondents who return a completed questionnaire.		
SRO Project Period	04/2023 - 12/2023		
Data Col Period	06/2023 - 09/2023		
Security Plan	NA		

Milestones			
Pre Production Start: 04/01/2023		**Pretest Start:**	
Pretest End:		**Recruitment Start:**	
Staffing Complete:		**GIT Start:**	
SS Train Start: 07/11/2023		**SS Train End:** 07/11/2023	
DC Start: 06/20/2023		**DC End:** 09/02/2023	

Other Project Team Members	Gary Hein/Debbie Zivan: Project Leads Cindy Tsao: Budget Analyst Vanessa Clarke: Project Assistant Carolyn Viera Martinez: Coding Lead
Other Project Name	LHMS Spring
Sample Mgmt System	SMS
Data Col Tool	SAQ; Other (Blaise SMS)
Hardware	Desktop; [UM cell] Phone; Paper and Pencil
DE Software	Other (Weblog)
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, prepaid ($25)
Payment Method	Check through STrak RPay System

Report Period	June, 2023 (LHMS 2023 Spring)	Implementing
Risk Level	On Track	
Monthly Updates	-LHMS Spring Amendment Approved -Cover letters and sample file sent to DataForce -Set up LHMS Spring 2023 SMS TEST project for reminder calling and began testing -Data proofs and proofs of mailing packets received and approved -Conducted final sample review -Packets mailed to respondents 6/20 -Logging of returned packets will commence in early July -Preparations began for reminder calling training on 7/11/2023	

Special Issues	-SAQ printing error identified the day prior to the July SSL reminder calling training. New SAQs being printed by DataForce for respondents who request an SAQ be remailed to them.	
Cost as of Jul 21, 2023	*Total Cost to Date (direct + indirect):*	103,789.65
	Est Cost at Completion (E$AC):	309,678.95
	Total Budget:	457,922.00
	Variance (Total Budget minus- E$AC):	148,243.05
	Reason for Variance:	Actual sample of 1955 is lower than budgeted sample of 2288, resulting in generally lower costs across all resources.
Projections as of Jul 21, 2023	*Dollars Projected for Month:*	120,961.51
	Actual Dollars Used:	16,960.50
	Variance (Projected minus Actual):	104,001.01
	Reason for Variance:	Over 50K in respondent TOAs hit in May but were projected for June. Nearly 10k in dataforce charges projected in June will hit in next three ensuing months instead. Project staff hours overprojected this month. Future projections in CRS will be updated accordingly.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	1055	54%	
	Goal at Completion:	1055	54%	
	Current Actual:	N/A	N/A	
	Estimate at Complete:	1055	54%	
	Variance:			

Other Measures

Project Name	**(MI CReSS (Year 3)) Michigan COVID-19 Recovery Surveillance Cohort Study**		
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 667,755.00	**Indirect Budget:** 173,620.00	**Total Budget:** 841,375.00
Principal			
Investigator/Clients			
Funding Agency			
IRB	***HUM#:*** HUM00181068		***Period of Approval:*** Exempt
Project Team	***Project Lead:*** Timothy Prand		
	Budget Analyst: William Lokers		
	Production Manager: Ruth B Philippou		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Lisa J Carn		
	Production Manager 2:		
Proposal #	no data		
Description	MI CReSS is a partnership between the University of Michigan School of Public Health (SPH) and the Michigan Department of Health and Human Services. It is a public health surveillance study to learn about Michiganders' experiences with COVID-19 using a representative sample of confirmed cases within the state. Using survey data, they plan to document sociodemographic inequities in COVID-19 testing, treatment, and recovery.		
	SRO's involvement includes the administration of a Follow-up survey for respondents that completed a Baseline survey with the SPH team. Based on the sample information provided, we will be re-contacting approximately 3,995 respondents who have already completed (or are estimated) to complete the Baseline survey to administer the Follow-up survey.		
	The Follow-up survey is estimated to be 45 minutes in length, and Respondents will be encouraged to complete the survey by web. However, SRO Interviewers will contact non-responders and conduct the interview over the telephone if the Respondents do not want to complete the survey on the web.		
SRO Project Period	08/2021 - 09/2023		
Data Col Period	01/2022 - 07/2023		
Security Plan	NA		

Milestones	***Pre Production Start:***	***Pretest Start:***	
	Pretest End:	***Recruitment Start:*** 09/16/2021	
	Staffing Complete:	***GIT Start:***	
	SS Train Start: 11/29/2021	***SS Train End:*** 12/02/2021	
	DC Start: 01/26/2022	***DC End:*** 07/07/2023	

Other Project Team Members	Bill Lokers: Financial Analyst Megan Hromco: Production Assistant Hueichun Peng: Technical Lead / WSMS db Programmer Peter Sparks: CAI Programmer (Blaise 5) Cheng Zhou: Web Component, ADT, Reports LihShwu Ke: DBA Architecture & Data Security Sarah Broumand: Data Manager Deb Wilson: Help Desk		
Other Project Name			
Sample Mgmt System	Web SMS		
Data Col Tool	Blaise 5		
Hardware	Laptop; Desktop		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Check, post ($25)		
Payment Method	NA		

Report Period	June, 2023 (MI CReSS (Year 3))	Implementing
Risk Level	On Track	
Monthly Updates	Sample replicate 16 was released as planned. Release 14 reached 80% early due to adjusting the sorting of sample in WSMS to call it more efficiently and has	

our highest completion rate of any of the previous releases.

Continued to focus on pre-production work and planning for Follow on cohort 2

Recruiting and Training was delayed for Follow on 2... until mid Aug.

Special Issues	Nancy (PI) raised a concern around the complete ratio for Spanish interviews for Follow-On 1
	- English – 79%, Arabic – 87%, Spanish – 48%
	- Initial investigations are inconclusive when looking overall
	   - Overall call attempts actually show a higher number of attempts for Spanish
	     - English-8.1 , Arabic-7.4 , Spanish-12.8
	
	Follow-On 2 has delayed its start in field from July 6 to Aug 17 due to IRB approvals (UofM & MDHHS)

Cost as of Jul 19, 2023	**Total Cost to Date (direct + indirect):**	429,512.18
	Est Cost at Completion (E$AC):	654,911.45
	Total Budget:	841,375.00
	Variance (Total Budget minus- E$AC):	186,463.55
	Reason for Variance:	New funding was added. Working with Bill and Nicole to see if we can extend the budget past 9/30. Expect to be significantly under.

Projections as of Jul 19, 2023	**Dollars Projected for Month:**	119,055.62
	Actual Dollars Used:	80,354.42
	Variance (Projected minus Actual):	38,701.20
	Reason for Variance:	Programming and Project Management hours could not be spent due to other project immediate needs. On the final 2 releases and are starting to run out of sample lines which means there will be a larger variance. Plus FO2 has not started on time.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	5,142 (Rel 1-16)	80% (60%-Web/40%Tel)	2.25
	Goal at Completion:		80% (60%-Web/40%Tel)	
	Current Actual:	4020	78% (71%-Web/29% Tel	4.84
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	**(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027**		
Project Mode	Primary: Class SAQ Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 6,267,988.00	**Indirect Budget:** 3,510,072.00	**Total Budget:** 9,778,060.00
Principal Investigator/Clients	Richard Miech (SRC)		
Funding Agency	National Institute on Drug Abuse, one of the National Institutes of Health.		
IRB	**HUM#:** 00217920		**Period of Approval:** from 7/20/22 No CR
Project Team	**Project Lead:** Rebecca Gatward		
	Budget Analyst: Dean E Stevens		
	Production Manager: Margaret Lavanger		
	Senior Project Advisor: Gregg Peterson		
	Production Manager 1: James Koopman		
	Production Manager 2:		
Proposal #	no data		
Description	Since 1975 the MTF survey has measured drug and alcohol use and related attitudes among adolescent students nationwide. A nationally representative sample of survey participants report their drug use behaviors across three time periods: lifetime, past year, and past month. The survey is funded by the NIDA, a component of the National Institutes of Health (NIH), and conducted by the University of Michigan. It is based on two interconnected series of surveys using nationally representative samples: (a) self-administered annual in-school surveys of 8th, 10th, and 12th graders (~45,000) in 400 schools. Proctors (SRO interviewers) coordinate and administer the data collection in schools (either FTF or remotely without visiting the schools). (b) panels of high school graduates aged 19-30, 35, 40,45, 50, 55, and 60 (now primarily surveyed by web). Panel members aged 19-30 are invited to participate every other year/asked to complete a web survey and the older sample members are sent questionnaires (mail and web) at five-year interval. The MTF panel study has three parts - early in the year a newsletter is mailed to panel members. If the newsletter is returned (undelivered) locating effort targets these panel members and others who have not participated for X years. The web panel launches (web) in spring and in around June a telephone non-response effort begins for those invited to participate. The panel members are recruited from the 12th graders who participate in the base year study. Press releases and published results can be found here.. http://www.monitoringthefuture.org/		
SRO Project Period	04/2022 - 03/2027		
Data Col Period	04/2022 - 03/2027		
Security Plan	Yes		

Milestones	**Pre Production Start:**		**Pretest Start:**
	Pretest End:		**Recruitment Start:**
	Staffing Complete:		**GIT Start:**
	SS Train Start:		**SS Train End:**
	DC Start:		**DC End:**

Other Project Team Members	Hueichun Peng Technical Lead (WebSMS programmer) Brad Goodwin (+Ed Green) Data Management Ashwin Dey SurveyTrak, WebTrak and MTF specific Apps. Programmer Deborah Wilson and Brendon Carroll Help Desk/Tablet support
Other Project Name	
Sample Mgmt System	SurveyTrak; Web SMS; Illume
Data Col Tool	Illume
Hardware	Laptop; Tablet; [UM cell] Phone
DE Software	Illume
QC Recording Tool	N/A
Incentive	Yes, Other (Honorarium paid to school by MTF Research staff)
Administration	ISR Group
Payment Type	NA
Payment Method	Check through other system

Report Period	June, 2023 (MTF Base Year 2022_27)	Implementing
Risk Level	On Track	
Monthly Updates	June 2023 - The final school survey was conducted on 6/5. MTF was administered in 248 schools and 24,096 students completed the survey - RR 82%. Schools were fairly equally distributed by grade). Interviewers visited 227 of these	

schools to proctor in person (92%). Surveys in the remaining schools (n=21) were coordinated by the interviewer without visiting the school. Of the schools passed to SRO, 38 were later coded as a refusal or non-sample for another reason, this is slightly higher than last year (12% compared with 10%). Refusals are assigned by the MTF research team and the refusal is usually passive (Interviewer is not able to make contact) or via email from the school contact person. The SRO interviewers are not generally involved in following up with schools once they have sent an email refusing participation.
- The number of recruited schools passed to SRO interviewers to conduct the survey administration protocol is lower than in previous years (286 compared to 349 in 2022 - in 2019 the number of schools was closer to 400). Recruiters are finding it much more difficult to recruit and then complete all the administrative steps they need to before the school is passed to interviewers. Interviewers are being asked to make FTF visits (and other contact attempts) to help gather the details they need to. This year the callers and interviewers have made FTF visits to schools in order to recruit the schools (the process that begins during the later summer in the previous year). We expect that SRO interviewers will be asked to help with FTF recruitment in September/October in preparation for the 2024 wave.

Special Issues

Cost as of Jul 12, 2023	*Total Cost to Date (direct + indirect):*	1,611,383.56
	Est Cost at Completion (E$AC):	6,833,438.81
	Total Budget:	9,778,060.00
	Variance (Total Budget minus- E$AC):	2,944,621.19
	Reason for Variance:	Current projections result in a large underspend for the five year grant period. A client report (with notes) is provided to Nicholas Prieur every month so the MTF research staff are aware of projected cost to complete. In April I provided Nick with more details about interviewer costs and assumptions used for projections. The amount provided to SRO will probably decrease for future years to reflect the current scope of work (i.e. surveys completed in less schools and using the post pandemic protocols). I have adjusted the projections for 2024 onwards based on completing survey administrations in 325 schools (number was agreed with Nick) - rather than 400. This increases the underspend. *************\ Not changed since last month (January) - left for info. 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) - We have increased staff time (marginally) to prepare for the small pilot (six schools) to test methods to increase cooperation from 12th grade students to provide contact details. We may also add some hours and expenses for FTF school recruitment trips that SRO has been asked to help with (given the lower response than is usual at this point, it is hoped that FTF visits may boost recruitment).

Projections as of Jul 12, 2023	*Dollars Projected for Month:*	106,882.20
	Actual Dollars Used:	119,258.74
	Variance (Projected minus Actual):	-12,376.54
	Reason for Variance:	The majority of the variance was caused by non-salary costs - around $8,000 hotel and airfares paid for using a PCARD (DCO) for travel in May were not processed until June.

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

Other Measures

Project Name	(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027		
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 2,496,935.00	**Indirect Budget:** 1,398,282.00	**Total Budget:** 3,895,217.00
Principal	John Schulenberg (UM-SRC)		
Investigator/Clients	Megan Patrick (UM-SRC)		
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Donnalee Ann Grey-Farquharson		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lloyd Fate Hemingway		
	Senior Project Advisor: Rebecca Gatward		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	This project is a continuation of MTF Illume Web 2021. PI staff will edit and test 12 survey versions, all previously programmed in Illume by SRO. SRO will further test the surveys as part of the systems integration process. All 12 surveys will be launched in 2021. After testing is complete, SRO will launch the 2021 Web survey data collection with an estimated sample size of 20,000 cases identified by the Principal Investigator who will deliver the contact information including e-mail address to SRO. The Web survey data collection will replace aspects of the standard mail-based data collection. Both the separately funded Winter Location calling effort and Non-Response follow-up calling will include this sample – with the calling effort being integrated with the standard MTF activities.		
SRO Project Period	01/2022 - 03/2027		
Data Col Period	04/2022 - 10/2026		
Security Plan	NA		

Milestones		
Pre Production Start:		*Pretest Start:*
Pretest End:		*Recruitment Start:*
Staffing Complete:		*GIT Start:*
SS Train Start:		*SS Train End:*
DC Start:		*DC End:*

Other Project Team Members	Rebecca Gatward (SPA), Donnalee Grey-Farquharson, Lloyd Hemingway, Hueichun Peng, Shaowei Sun, Peter Sparks, Ashwin Dey, Hongyu Johnson, Minako Edgar, Brad Goodwin
Other Project Name	MTF
Sample Mgmt System	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	June, 2023 (MTF Panel 2022-27)	Implementing
Risk Level	On Track	
Monthly Updates	1. Management - started the conversation with the study team on moving survey to Qualtrics in 2024 production. - Discuss timeline to deliver timing data to MTF staff 2. System - Continues to monitor the production on Web SMS, RLM, LabSMS systems 3. Data Collection - As of 06/30/2023 -Total Released Sample = 18727 -Total Completes = 8177 - RR = 43.66% 4. Data Delivery: Initial data delivery specs for 2023 received. DM and programmer will soon meet with study team to discuss the details		

5. NR - training went well, secured SSL project staff, Production moving at a good pace

6. RLM: finishing the last few items in the Enhancement/Development list.

Special Issues

Cost as of Jun 30, 2023	*Total Cost to Date (direct + indirect):*		946,314.98
	Est Cost at Completion (E$AC):		3,862,024.13
	Total Budget:		3,895,217.00
	Variance (Total Budget minus- E$AC):		33,192.87
	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 Jun 30, 2023	*Dollars Projected for Month:*		151,372.77
	Actual Dollars Used:		153,684.66
	Variance (Projected minus Actual):		-2,311.89
	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:* 4/5/2022-3/22/24
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 Start:*	
Pretest End:		*Recruitment Start:*	
Staffing Complete:		*GIT Start:*	
SS Train Start:		*SS Train End:*	
DC Start:		*DC End:*	

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	June, 2023 (PR-PSID)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Atabex continued working on Instrument Development Spreadsheets. Received first invoice from Atabex for Translation -- Invoice accounted for 1/3 of translation budget, but not 1/3 of the total work scope. Project explored other options for translation - decided to hire an additional Temp through Brown. ETI purchased laptops for pretest. SRO working with ETI to create the ghost image. SRO provided ETI guidance on cost monitoring reports -- monthly cost monitoring meetings scheduled to begin. PIs provided ETI with the parameters for the Pretest convenience sample recruitment. ETI is planning to program a questionnaire to collect this demographic information for pretest. Pretest training delayed from August until October. Dates TBD. IRB approved of the Human Subjects Training plan.	

PIs considering delaying main data collection from January 2024 to April 2025. PIs planning for NIA proposal resubmission in Nov 23.

HD created three testing laptops, PR temp created test address preload. PR Module was programmed in Spanish and loaded into CTT. Working to determine how much technical training ETI will need, and in what mode (whether training will need to be in-person).

Special Issues	Timeline concerns: unsure how long translations will take and whether pretesting in October is feasible. Cost of translation has ben significantly higher than budgeted.	
Cost as of Jul 19, 2023	*Total Cost to Date (direct + indirect):*	334,966.59
	Est Cost at Completion (E$AC):	1,232,502.12
	Total Budget:	1,292,585.00
	Variance (Total Budget minus- E$AC):	60,082.88
	Reason for Variance:	Projected cost to complete decreased by $8.9K between May and June. Biggest driver is decreasing Data Management hours.
Projections as of Jul 19, 2023	*Dollars Projected for Month:*	54,210.53
	Actual Dollars Used:	32,905.84
	Variance (Projected minus Actual):	21,304.69
	Reason for Variance:	Actuals for tech categories were lower than projections.

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

Other Measures

Project Name	**(PSID CDS 2023) PSID Childhood Development Supplement 2023**
Project Mode	Primary: Mixed Secondary: Face to Face Total of Modes: 4
Project Type	Sponsored Projects
Budget	**Direct Budget**: 0.10 **Indirect Budget:** 0.10 **Total Budget:** 0.20
Principal Investigator/Clients	Narayan Sastry (SRC)
Funding Agency	
IRB	**HUM#:** HUM00166316 **Period of Approval:**
Project Team	**Project Lead:** Piotr Dworak
	Budget Analyst: Ivanna Iavorska-Em
	Production Manager: Sarah Crane
	Senior Project Advisor: Stephanie A Chardoul
	Production Manager 1:
	Production Manager 2:
Proposal #	no data
Description	A 2023 wave of the Childhood Development Supplement (CDS) is going to be conducted in two phases. Phase 1: from September 2023 – May 2024 and Phase 2: from June 2024 - January 2025. The sample for CDS is comprised of the PSID-eligible children (ages 0 -17) from the Core 2023 families we interview and their primary caregivers. Approximately 3,700 families will be included, with some Core families containing several CDS children. As part of the CDS Phase 1, families are asked to complete phone coverscreen and PCG interviews followed by mixed Adolescent 12 - 17 phone/web interview (including an IVR component in phone mode). In Phase 2 families will be visited in person (where possible) and asked to complete Child 8 - 11 interviews (via Video if out of area), provide physical measurements, educational assessments, saliva collection, time diaries, school and birth record linkage forms. CDS interviewing will be conducted by a mix of SSL and Field interviewers. Coverscreen and PCG interviews will be handled by SurveyTrak and Blaise 4.8, Adolescent interviews will be handled by MSMS and Blaise 5.
SRO Project Period	08/2022 - 01/2025
Data Col Period	09/2023 - 01/2025
Security Plan	NA

Milestones			
Pre Production Start: 10/01/2022		**Pretest Start:** 04/24/2023	
Pretest End: 05/14/2023		**Recruitment Start:** 07/01/2023	
Staffing Complete: 08/01/2023		**GIT Start:** 09/05/2023	
SS Train Start: 09/07/2023		**SS Train End:** 09/12/2023	
DC Start: 09/14/2023		**DC End:** 01/01/2025	

Other Project Team Members	
Other Project Name	
Sample Mgmt System	SurveyTrak; MSMS; Other (WSMS)
Data Col Tool	Blaise 4.8; Blaise 5; Other (IVR)
Hardware	Laptop; Desktop; [UM cell] Phone; Paper and Pencil
DE Software	Other (Time Diary Coding)
QC Recording Tool	DRI-CARI; Camtasia
Incentive	Yes, R; Yes, INF; Yes, Other (PCG)
Administration	SRO Group
Payment Type	Check, post (75 + interventions); Other (ePay)
Payment Method	Check through other system (PSID RAPS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (PSID RAPS)

Report Period	June, 2023 (PSID CDS 2023)	Initiation
Risk Level	On Track	
Monthly Updates	CDS 2023 has not yet received the 2023 - 2025 funding from NIHCD, however, PIs found $178K to cover some of the cost accrued under the contingency account.	
	PIs asked us to continue development and preparations for the pretest and we are on track with technical development for those dates.	
	CDS 2023 Pretest is scheduled to start on 7/8 following training on 6/26 -29. We currently recruited 21 of the 30+ families needed for the pretest. We are going to tap into PeachJar as our next recruitment strategy.	
	Pretest components will cover Phase 1 of the CDS 2023 data collection protocol including remote administration of phone coverscreen, and a primary care-giver interview followed by a web-phone interviews with adolescents 12-17. Phase 1 will also include a transfer from CATI to IVR to ask sensitive questions. We are still finalizing the last part	

of the IVR contract - Enghouse needs to sing a data protection agreement to be authorized by U-M for human subject data collection.

In recent discussions, due to delay in securing funding, there is a growing consensus that Phase 1 of CDS should be re-scheduled from October - May 2024 to start later in January 2024. Preparations, and estimations are conducted to determine the implications of this change.

Phase 2 of CDS data collection will include home visits with Saliva, Woodcock-Johnson, Time Diaries, and younger child (8-11) interviews. Phase 2 is tentatively scheduled to start in Summer or Fall of 2024 through January 2025.

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
- ST + B5 project for younger children programmed and tested

MSMS Programming:
-- INT 4 tested
-- Copy procedure for Child lines from ST to MSMS has been implemented and is being refined

New IVR system: Enghouse / Survox sole source is awaiting the last part of the contract (DPA)

Special Issues	Budget: Contingency budget has been established through October '22 but as of February, we don't have a clear expectation for when the funding will be awarded. SRO is communicating regularly with the PI and the SRC Director's office to monitor the contingency account. PIs are able to cover $178K. Tech systems: CDS development is ceding programming time to allow some programmers to focus on PSID-Core launch. This led to some delays on the MSMS side of our development.

Cost as of	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	0.20
	Variance (Total Budget minus- E$AC):	0.00
	Reason for Variance:	CDS is under contingency funding awaiting funding decision from NIH. We spent $342K direct through February.
Projections as of	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	0.00
	Variance (Projected minus Actual):	0.00
	Reason for Variance:	In February, we projected spending $51K but spent $47K.

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

Other Measures

Project Name	**(PSID23 Online Contact Update) Panel Study of Income Dynamics 2023 Online Contact Update**
Project Mode	Primary: Web Total of Modes: 1
Project Type	Sponsored Projects
Budget	**Direct Budget**: 47,456.00 **Indirect Budget:** 0.00 **Total Budget:** 47,456.00
Principal Investigator/Clients	Katherine McGonagle (PSID)
Funding Agency	NSF, NIA, NICHD, The Office of the Assistant Secretary for Planning and Evaluation of the United States, DHHS, The Economic Research Service of the United States Department of Agriculture, HUD, DOL, The Center on Philanthropy at the Indiana University-Purdue University
IRB	***HUM#:*** HUM00062417 **Period of Approval:** 3/22/22-3/21/23
Project Team	***Project Lead:*** Camila Kendall
	Budget Analyst: Ivanna Iavorska-Em
	Production Manager:
	Senior Project Advisor: Stephanie A Chardoul
	Production Manager 1:
	Production Manager 2:
Proposal #	no data
Description	SRO will write technical specifications, program and test a Blaise 5 web instrument and web portal with authentication that will allow PSID and TAS respondents to confirm or update their contact information via an online survey. SRO will provide PSID will authenticated QR codes that will be embedded in a mailing sent to respondents. SRO will also send the respondents one email reminder with an authenticated link. This project is under the PSID Core IRB.
SRO Project Period	04/2022 - 12/2022
Data Col Period	06/2022 - 12/2022
Security Plan	NA

Milestones			
Pre Production Start: 04/01/2022		***Pretest Start:***	
Pretest End:		***Recruitment Start:***	
Staffing Complete:		***GIT Start:***	
SS Train Start:		***SS Train End:***	
DC Start: 07/01/2022		***DC End:*** 11/30/2022	

Other Project Team Members	Rachel Orlowski -- PSID Core Lead Karl Dinkelmann -- TSG Lead and Blaise Programming Support Marsha Skoman -- Blaise Programmer Daric Thorne -- MSMS Spec Lead Kyle Goodman -- MSMS Set up Programmer Jim Rodgers -- MSMS Lead Rose Zybel -- Data Manager
Other Project Name	
Sample Mgmt System	MSMS
Data Col Tool	Blaise 5
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, R
Administration	ISR Group (PSID)
Payment Type	Check, post ($10); Other (electronic, post--JP Morgan)
Payment Method	Check through other system (PSID staff will handle check & e-payment via RAPS)

Report Period	June, 2023 (PSID23 Online Contact Update)	Closing
Risk Level	On Track	
Monthly Updates	Final cost report. All archiving work finished in May. Final projections hit the project in June.	
Special Issues		
Cost as of Jul 12, 2023	***Total Cost to Date (direct + indirect):***	46,842.45
	Est Cost at Completion (E$AC):	46,842.45
	Total Budget:	47,456.00

	Variance (Total Budget minus- E$AC):			613.55
	Reason for Variance:	Overall underrun increased by ~$164.		
Projections as of Jul 12, 2023	Dollars Projected for Month:			0.00
	Actual Dollars Used:			0.00
	Variance (Projected minus Actual):			0.00
	Reason for Variance:	App Programmer Intermediate completed archiving work. Projections were for an App Programmer Sr.		

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

Project Name	(PSID23) Panel Study of Income Dynamics Core 2023		
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 6,235,802.00	**Indirect Budget:** 0.00	**Total Budget:** 6,235,802.00
Principal	Katherine McGonagle (UM-SRC-PSID)		
Investigator/Clients	Narayan Sastry (UM-SRC-PSID)		
	Esther Friedman (UM-SRC-PSID)		
Funding Agency			
IRB	*HUM#:* HUM00062417		*Period of Approval:* 3/22/22-3/21/24
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	The Panel Study of Income Dynamics (PSID--also known to Respondents as the Family Economics Study or FES) is a longitudinal survey of several thousand individuals and their families, carried out since 1968 and conducted every two years. The sample is comprised of respondents from the 4,800 original families as well as new (immigrant) sample added in 1997/1999 and 2017/2019. The total 2023 sample size will be approx. 11,200, with approx. 9,650 completed interviews expected. Most of the information collected is about family composition and changes (marriages, divorces, births, deaths, people moving in and out); income sources and amounts; employment and pensions; and wealth. There are also questions about housing; education; vehicles; health; fertility; COVID-19; and money spent on food, healthcare, and school. The main focus is on how these family composition and financial factors interact with each other and how they change over time. The survey will be administered via web and telephone, with the expectation that more surveys will be completed via web than telephone (which will be a first for the study). During the 2023 wave, saliva samples will be collected for the first time on PSID Core. The Core interview must be completed to be eligible for saliva collection. Saliva sample participants that are eligible for collection during Core are adults related to Child Development Supplement (CDS) children but do not live with them. Interviewers will be trained on both the interview and saliva collection protocols. Both data collection efforts will be managed in the same MSMS project. The 2023 waves of CDS and the Transition into Adulthood (TAS) will follow PSID Core data collection. CDS and TAS eligibility is dependent upon completion of PSID Core.		
SRO Project Period	03/2022 - 05/2024		
Data Col Period	03/2023 - 02/2024		
Security Plan	NA		

Milestones				
Pre Production Start: 03/01/2022			*Pretest Start:* 10/11/2022	
Pretest End: 10/31/2022			*Recruitment Start:* 09/19/2022	
Staffing Complete: 04/21/2023			*GIT Start:* 06/05/2023	
SS Train Start: 03/08/2023			*SS Train End:* 06/11/2023	
DC Start: 03/23/2023			*DC End:* 02/28/2024	

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; Self Scheduler Programmer - Peter Sparks; Help Desk Support - Andrea Pierce; Production Tech Support - Sarah 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	June, 2023 (PSID23)		Implementing

Risk Level	Some Concerns

Monthly Updates	Summary of June 2023 Activities
	Training: Training 2 at Novi Sheraton. GIT/TTT/TL/Bridge Training held June 5 – 6. Study-specific Training was June 7 – 11. Trained 65 new hires and 12 on-staffers. 10 new hires did not certify or resigned at training. Some interviewers required remote retraining. Continued training all T2 on team calls. Reshuffled sample assignment on June 14.
	Production: Release 6 (containing Roadrunner experiment) was invited during the week of June 19. We initiated the Web Special Offer intervention for Release 5 during the week of June 26.
	Spanish: Spanish CATI testing concluded. Spanish web testing began. More Spanish web fixes needed than anticipated, so PIs agreed to change sample release plans. All Spanish sample will start with CATI as the only mode. After Spanish web is ready, some will be offered web as non-response follow-up. PIs are considering full review of Spanish CATI and web translations for PSID 2025. Spanish text and email template testing underway.
	Saliva: Testing saliva line generation, rules, and DCA layout. Training, Respondent material, and report development underway. Purchasing supplies.
	Tech: Reclassified text and email templates to better monitor interviewers' adherence to the contact protocol. Updated PQT, TL Toolkit, and reports to meet the needs of the field leadership. Conducted two rounds of Prod Data testing of splitoffs. Testing self scheduler system and text and email templates. Addressed bugs with 68ID Site Team Locating.

Special Issues	Unable to staff as many on-staff interviewer hours as budgeted -- many shared agreements. Experiencing higher than anticipated levels of on-staffer attrition. Need more new hires than anticipated, which has a sizable negative impact on the budget and proposes a risk to data collection. Interview aspects of the project taking more effort than anticipated, which has led to less effort being spent on the saliva portion of the project.

Cost as of Jul 21, 2023	*Total Cost to Date (direct + indirect):*	2,140,648.43
	Est Cost at Completion (E$AC):	6,212,517.12
	Total Budget:	6,235,802.00
	Variance (Total Budget minus- E$AC):	23,284.88
	Reason for Variance:	June CRS is not yet final - additional projects are needed. CRS has the main iw and saliva budgets loaded. Rates for staff working on the project are higher than budgeted rates. More new hires are needed than what was budgeted. Note: Unable to separate Core IDC costs from Contact Update IDC costs. Cost values only reflect Direct Costs.

Projections as of Jul 21, 2023	*Dollars Projected for Month:*	1,015,473.19
	Actual Dollars Used:	317,928.11
	Variance (Projected minus Actual):	697,545.08
	Reason for Variance:	June CRS is not yet final - additional projects are needed. Managers, help desk, data managers, survey techs, training support, and recruitment staff charged less time than projected. Hosting and recruitment advertising cost less than projected. 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:	9646	89%	6.58
	Current Actual:	4435	45%	2.1
	Estimate at Complete:			
	Variance:			

Other Measures	Notes for Measures Above: From Dashboard through 7/1/23. Units Completed = 4435 iws (531 CATI--12%, 3904 web--88%). Sample Invited = 9820. Still need to develop a goal chart. 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	*Pre Production Start:*	*Pretest Start:*
	Pretest End:	*Recruitment Start:*
	Staffing Complete:	*GIT Start:*
	SS Train Start:	*SS Train End:*
	DC Start:	*DC End:*

Other Project Team Members	
Other Project Name	Amish study
Sample Mgmt System	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	Not used
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	June, 2023 (QoL & Hearing Loss)	Implementing
Risk Level	On Track	
Monthly Updates	On Wednesday, June 7, Margaret Hudson and Lisa Van Havermaet conducted 5 additional cognitive interviews for this study at the field clinic meeting our goal. Notes from interviews were reviewed and final report prepared and delivered to the research team on June 29 recommending a few changes to the questionnaire and noting some additional things to consider for future data collection.	
Special Issues		
Cost as of	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	8,200.00
	Variance (Total Budget minus- E$AC):	0.00
	Reason for Variance:	
Projections as of	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	0.00
	Variance (Projected minus Actual):	0.00
	Reason for Variance:	

Measures

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

Other Measures

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

Project Name	**(SAME) Skills Assessments Mode Evaluation Study**
Project Mode	Primary: Telephone Secondary: Face to Face Total of Modes: 2
Project Type	Sponsored Projects
Budget	**Direct Budget**: 193,800.00 **Indirect Budget:** 108,527.00 **Total Budget:** 302,327.00
Principal	Paula Fomby (U Penn/UM/ISR/SRC)
Investigator/Clients	Narayan Sastry (UM/ISR/SRC)
Funding Agency	
IRB	*HUM#:* *Period of Approval:*
Project Team	*Project Lead:* Hongyu Johnson
	Budget Analyst: Ivanna Iavorska-Em
	Production Manager: Sarah Crane
	Senior Project Advisor: Stephanie A Chardoul
	Production Manager 1:
	Production Manager 2:
Proposal #	no data
Description	The WJ-RAP is the continuation study from the WJ-Pilot of 2021. The goal of this project is to complete Woodcock Johnson Tests of Cognitive Abilities both remotely and in person, during two separate interviews, from 80 families with an average of 1.5 children aged 5-17 per family. SRO will recruit a convenience sample of 90 families in order to obtain a completed remote and in-person interview from 80 families. For the remote administration interview, a tablet computer will be sent to respondents and used to electronically display the pages of the Woodcock Johnson assessment tool while an SRO interviewer communicates via a video link on a laptop. The Respondent will return the tablet in a postage paid mailer. For the in-person interview, an SRO interviewer will travel to meet respondents in person and conduct another version of the Woodcock Johnson assessment using Woodcock Johnson easels. This project will take place from January 2023 to September 2023.
SRO Project Period	02/2023 - 12/2023
Data Col Period	06/2023 - 08/2023
Security Plan	NA

Milestones		
Pre Production Start:		*Pretest Start:*
Pretest End:		*Recruitment Start:*
Staffing Complete:		*GIT Start:*
SS Train Start:		*SS Train End:*
DC Start:		*DC End:*

Other Project Team Members	Stephanie Chardoul - SRO SPA Sarah Crane - Survey Director (Project Consultant) and Production Manager Helen (Hongyu) Johnson - Lead Project Manager Mari Haft- SRO staff Youhong Liu - Blaise Programmer Kelly Lieske - Blaise Programmer Edward Green - Data Manager Laura Yoder - Data Operations Supervisor Jeff Smith - Data Operations Supervisor John Gawlas - HelpDesk staff David Bolt - HelpDesk Supervisor Russ Stark - DCO Staff Tyler Davis-Kean - DCO Assistant (temp)
Other Project Name	Woodcock-Johnson Remote Administration Project
Sample Mgmt System	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop; Desktop; Tablet; [UM cell] Phone; Other (external monitor)
DE Software	NA
QC Recording Tool	Camtasia
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post ($100)
Payment Method	Check through STrak RPay System

Report Period	June, 2023 (SAME)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Project Management:	

- Regularly provide updates to the SRO Admin team.
- Continued to closely monitor the costs and adjust projections with the financial analyst.
- Continued to prepare for 2 additional trainings
- Closely monitor recruitment efforts
- Coordinated with other project lead to submit Snowball Recruitment Outreach inquiries to IRB.
- Purchased supplies for production
- Secured SSA support on tablet shipment tasks and coordinated the specific task training with HelpDesk staff

Technical System Development and Testing/Training:
- Continue to coordinate with the technical team staff to monitor tech issues during training
- Coordinate HD for training and production support
- Worked closely with tech team to resolve issues during the Release 1 production.

Interviewer Hiring & Training
- 2 additional trainings completed in June (total of 4 iwers)

Production:
-We have been recruiting participants during the month of June and extend through July.
- Production Release 1 (42 families with 58 children) has been launched during the last week of June as well as extending production to Sept.30, 2023
- We started setting up appointments.

Special Issues	working on opportunities for cost savings, and are developing plans for assessment scoring within SRO and PSID project team			
Cost as of Jun 30, 2023	**Total Cost to Date (direct + indirect):**			133,373.19
	Est Cost at Completion (E$AC):			319,735.95
	Total Budget:			302,327.00
	Variance (Total Budget minus- E$AC):			-17,408.95
	Reason for Variance:	The overrun was caused by readjusting the estimated projections across the board to the end of September 2023		
Projections as of Jun 30, 2023	**Dollars Projected for Month:**			61,268.20
	Actual Dollars Used:			34,795.08
	Variance (Projected minus Actual):			26,473.12
	Reason for Variance:	Application programmers, HelpDesk staff and field staff used less hours than we projected in June overall.		

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

Other Measures

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	The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations. The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 600 interviews.		
SRO Project Period	01/2023 - 12/2023		
Data Col Period	12/2022 - 12/2023		
Security Plan	NA		

Milestones	*Pre Production Start:*	*Pretest Start:*
	Pretest End:	*Recruitment Start:*
	Staffing Complete:	*GIT Start:*
	SS Train Start:	*SS Train End:*
	DC Start: 12/27/2022	*DC End:* 12/20/2023

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

Report Period	June, 2023 (SCA 2023)	Implementing
Risk Level	On Track	
Monthly Updates	SCA June 23 began as scheduled on WED 5/24/23, and ended 1 day ahead of schedule on SAT 6/24/23. We completed 600 IWs (320 RDD/180 RECON/100 R12) exactly meeting goals at a cumulative HPI of 2.85 (.35 below the budgeted HPI of 3.2 as well as below the targeted HPI of 3.0.	
Special Issues	No special issues to report.	

Cost as of Jul 19, 2023	*Total Cost to Date (direct + indirect):*	636,990.54
	Est Cost at Completion (E$AC):	1,286,574.12
	Total Budget:	1,332,352.00
	Variance (Total Budget minus- E$AC):	45,777.88
	Reason for Variance:	A lower than budgeted HPI combined with a reduction in hours for Production Manager Keating (due to assignment to LHMS) and Project Manager Camelo (due to 2 weeks vacation, as well as lower than

budgeted training costs account for the increase in the projected underrun for June 2023.

Projections as of Jul 19, 2023	Dollars Projected for Month:	139,008.63
	Actual Dollars Used:	122,724.49
	Variance (Projected minus Actual):	16,284.14
	Reason for Variance:	A lower than budgeted HPI combined with a reduction in hours for Production Manager Keating (due to assignment to LHMS) and Project Manager Camelo (due to 2 weeks vacation, as well as lower than budgeted training costs account for the increase in the projected underrun for FY 2023.

Measures		Units at Complete	RR	HPI
	Current Goal:	600		3.0
	Goal at Completion:	600		3.0
	Current Actual:	600		2.85
	Estimate at Complete:	600		2.85
	Variance:	0		-.15

Other Measures

Project Name	**(SRS 2021) Social Relations 2023**		
Project Mode	Primary: Face to Face Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 3,767,057.11	**Indirect Budget:** 2,109,553.00	**Total Budget:** 5,876,610.11
Principal	Toni Antonucci (ISR)		
Investigator/Clients	Kristine Ajrouch (ISR)		
	Laura Zahodne (ISR)		
Funding Agency	NIH		
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Taghreid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 3400 interviews with respondents aged 35 years or older residing in the tri-county area of Southeast Michigan (Wayne, Oakland and Macomb counties) and 244 interviews with original Social Relations panel sample members aged younger than 65 years of age. The project involves screening up to 6900 new sample lines., with one selected respondent per household. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements (height, weight, blood pressure, grip strength) and saliva collection. The SRS 2023 project will use the same instrument programmed for the D-Amp project, with the only new programming being that for a screener. The screener will be translated into Arabic. No informant or proxy interview is included in the project scope. Interviews will be conducted in English or Arabic.		
SRO Project Period	09/2021 - 05/2023		
Data Col Period	05/2023 - 04/2024		
Security Plan	NA		

Milestones	*Pre Production Start:* 09/01/2022	*Pretest Start:*
	Pretest End:	*Recruitment Start:* 02/01/2023
	Staffing Complete: 04/10/2023	*GIT Start:* 05/16/2023
	SS Train Start: 05/18/2023	*SS Train End:* 05/25/2023
	DC Start: 05/30/2023	*DC End:* 04/30/2023

Other Project Team Members	Taghreid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall
Other Project Name	Social Relations 2022, DAWN, Social Relations 2023
Sample Mgmt System	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop; [UM cell] Phone; Paper and Pencil
DE Software	Other (Weblog)
QC Recording Tool	DRI-CARI
Incentive	Yes, R
Administration	SRO Group
Payment Type	Cash, prepaid ($75 respondent, $25 informant); Other ($2 screener incentive)
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)

Report Period	June, 2023 (SRS 2021)	Implementing
Risk Level	Some Concerns	
Monthly Updates	During June 2023, SRC activities on the DAWN projects included the following: Task 1: Management, Budget and Work Plan • Held meetings with the DAWN research team to discuss study planning, budget, scope and schedule for D-Amp and SRS. • Financial o Prepared cost reports and reviewed monthly expenses. o Finalized projections and entered them into the cost reporting system • Technical systems & Questionnaires o Updated and finalized Arabic main questionnaire and respondent booklet, Arabic Informant questionnaire and respondent booklet. ? Reviewed translation items, provided feedback to the research team. ? Re-created the Arabic QxQ for the Informant questionnaire to resolve formatting/display issues.	

? Updated Arabic Informant Respondent Booklet
o Conducted repeated rounds of testing on all instruments and on the sample management systems
o Finalized specification to the screener application to incorporate UMTRI 65+ flag.
o Continued updates to English Proxy questionnaire specification. Began updating Arabic proxy questionnaire specification.
• July Training preparation
o Modified study-specific training agenda for team leader training, train-the-trainer, and interviewer training.
o Updated powerpoint presentations.
o Began updates to project manual.
• Production preparation
o Inventoried supplies remaining from May training.
o Order supplies for July interviewer training.

Task 2: Sampling
• Reviewed revised specification for screener
• Programmed dashboards for production monitoring
• Provided release 2 address files to production management team.

Task 3: Questionnaire Development
• See Task 1 for activities completed by the management team
• Conducted repeated rounds of testing on all instruments

Task 4: CAI Programming
• Began programming on Arabic instruments.

Task 5: Systems Programming
• Conducted continued rounds of testing/bug fixes to all sample management instruments
• Began preparation of systems for quality control. Fixed bugs in quality control systems preventing sample from loading into the quality control system. Updated data.
• Programmed, tested and finalized field progress reports.

Tasks 6, 7: Interviewer Recruitment & Hiring, Training
• Facilities
o Finalized contract for July training
o Conducted outreach to facility to update specifications for audio visual equipment for July training
• Processed personnel paperwork for interviewers who left from (resigned from) the May training cohort
• Interviewer recruitment for July
o Evaluated applications, conducted 1st, 2nd interviews for interviewer positions; conducted bilingual certification interviews
o Made offers to selected candidates, processed hiring paperwork and requested background checks.
? 46 interviewers hired for July, including 4 certified bilinguals (2 additional not yet certified).
• Training
o Conducted debriefing on May training
o Began work to review the July training agenda

Task 8: Main Data Collection
• Responded to incoming email from respondents, logged returned mail
• Logged/checked returned cognition packages
• Fulfilled supply requests from field
• Through June 30, 2023:
o Screener Completions:

	High MENA	Low MENA
Selected for D-Amp	24	0
Selected for SRS	12	106
Eligible, Not Selected	188	0
Not Eligible	10	19
Non-Sample	0	9

o D-AMP – 2 completed main interviews, 1 completed informant interview
o Social Relations – 45 completed interviews

Task 9: Post Collection Processing
• No activity this month

Task 10: Weighting
• No activity this month

Task 11: Final Data Deliverables
• No activity this month

Special Issues	Areas Needing Special Attention

We are not getting enough hours or production effort from interviewers to move production forward. High attrition has also hurt the production effort. The current recruitment and training in July 2023 has also experienced very high attrition. A third training will likely be needed.

• Production Interviewing – production screening and interviewing is proceeding more slowly than anticipated due to a lower number of interviewers completing training and lower than anticipated hours from interviewers. Hours per screener, hours per interview are currently higher than budgeted.
o The production management team is actively working with interviewers to ensure they work the required number of hours and work sample lines efficiently and effectively
o Participation in saliva collection is higher than anticipated. While it is still too early to make predictions about the entire study, this is an area to watch as it could result in higher costs due to the need to order more supplies, and on the research side, pay for more samples to be processed.
• Financial:
o SRO is carefully monitoring programming progress and cost. Some line items currently have slack that will be able to absorb modest overruns on other line items.
? Blaise programming will be higher than budgeted due to the complexity of launching the electronic consent forms, addition of the consent process programming, and changes to the questionnaire which involved re-working a majority of the skip patterns and respondent booklet references.
? SurveyTrak programming will be higher than budgeted due to the unexpected complexity of the screener project programming, which generates sample lines for two studies. It has also been more difficult than anticipated to resurrect programming from 2019/2020 and update to the most current version of SurveyTrak.
• Interviewer Attrition
o The project hired 28 interviewers for the May training, but is experiencing substantial attrition prior to and during training. This level of attrition is similar to that being experienced by other SRO projects and also by other survey research firms. Reasons for attrition include finding full-time employment with benefits, family or personal emergencies, or unexplained drops. 15 interviewers were fully certified, and 2 were certified for screening only. One interviewer resigned before production started on May 30, leaving 14 certified interviewers with two screening interviewers.
• Schedule
o Programming is running behind schedule due to issues noted above.
? Priority is being given to launching the screener (English & Arabic), and the main survey, physical measures and cognition sections in English, as well as the informant questionnaire in English.
? The Arabic version of the main questionnaire, informant interview and the proxy questionnaire (English & Arabic) will not be ready for the May 30 study launch. We will advise as soon as feasible on a possible launch date.

Cost as of	Total Cost to Date (direct + indirect):	417,239.19
	Est Cost at Completion (E$AC):	5,869,966.23
	Total Budget:	5,876,610.11
	Variance (Total Budget minus- E$AC):	6,643.88
	Reason for Variance:	The variance is insignificant at this time, and can be attributed to lower interviewer costs due to the use of all new hire interviewers. Production is very slow, and does not yet allow interviewing cost projections for the full project period. We do anticipate that the underrun will disappear due to higher travel and interviewing costs.
Projections as of	Dollars Projected for Month:	164,885.87
	Actual Dollars Used:	111,913.26
	Variance (Projected minus Actual):	52,972.61
	Reason for Variance:	Training travel was not expensed as projected during May. Labor on several line items came in substantially lower than anticipated, likely due to staff splitting their time across a number of project assignments. Interviewer hours were lower than anticipated during to high attrition before and during training. In addition, Survey Tech hours were projected, however the team did not start work until June 18 due to technical issues.

Measures		Units at Complete	RR	HPI
	Current Goal:	3644	varies	10.5
	Goal at Completion:	3644	varies	10.5
	Current Actual:	45		18.39
	Estimate at Complete:	3644		
	Variance:			
Other Measures	80% screener cooperation rate on new sample, 65% panel sample response rate			
	8.5 budgeted hpi without screening for new sample and panel sample; new sample HPI budgeted at 10.5 with screening			

Project Name	(STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study		
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 8,196,521.00	**Indirect Budget:** 4,590,892.00	**Total Budget:** 12,809,390.00
Principal	James Wagner (University of Michigan)		
Investigator/Clients	Robert Ursano (Uniformed Services University of the Health Scienc)		
	Murray Stein / Ron Kessler (University of California San Diego / Harvard)		
Funding Agency	Department of Defense		
IRB	**HUM#:** HUM00180765		**Period of Approval:** 4/21/22 - 4/20/23
Project Team	**Project Lead:** Meredith A House		
	Budget Analyst: William Lokers		
	Production Manager: Ruth B Philippou		
	Senior Project Advisor: Lisa S Holland		
	Production Manager 1: Jeffrey Albrecht Jr		
	Production Manager 2: Lisa M Lewandowski-Romps		
Proposal #	no data		
Description	This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.		
	For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data.		
	To date, we have completed 2 waves of STARRS-LS interviewing. During Wave 1, we attempted to contact 50,000 individuals and completed approximately 14,500 full interviews. All Wave 1 participants that completed a full Wave 1 interview were asked to participate in Wave 2. Waves 3 and 4, which are covered in this application, will include the full STARRS-LS Wave 2 sample, regardless of whether they completed the interview.		
	In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys).		
SRO Project Period	05/2020 - 04/2025		
Data Col Period	11/2022 - 04/2024		
Security Plan	Yes		

Milestones	**Pre Production Start:** 04/01/2022	**Pretest Start:**
	Pretest End:	**Recruitment Start:** 07/23/2022
	Staffing Complete: 10/01/2022	**GIT Start:**
	SS Train Start: 11/14/2022	**SS Train End:** 11/17/2022
	DC Start: 11/07/2022	**DC End:** 04/15/2024

Other Project Team Members	Ryan Yoder, Keith Liebetreu, Becky Loomis, Steven Sonoras, Jaleesa Rosario Turner, Andrew Piskorowski, Rose Zdybel, Ji Qi, Makenna Harrison, Lamont Manley, Lisa Van Havermaet, Stephanie Windisch, Youhong Liu, Peter Sparks. Pam Swanson, Jim Rodgers, Marcus Blough, Nick Hinkle-DeGroot, Pete Westhead

Other Project Name	STARRS-LS Continuation
Sample Mgmt System	MSMS
Data Col Tool	Blaise 5
Hardware	Laptop; Desktop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	Other (Blaise CARI)
Incentive	Yes, R

Administration	SRO Group
Payment Type	Check, post ($50-$100)
Payment Method	Check through other system (MSMS)

Report Period	June, 2023 (STARRS-LS Waves 3 & 4)	Implementing
Risk Level	On Track	
Monthly Updates	Project Management and Planning:	

Monthly Updates

Project Management and Planning:
? James attended the senior leader IPR on June 27.
? Quarterly safety plan tables were sent to USUHS for M&RA/GSC on June 5.
? We sent weekly production updates to the PIs, and reported on progress on the call with the Army/M&RA.
? Meredith created the agenda/notes and facilitated the weekly meeting with the STARRS project managers.
? We carried out bi-weekly meetings with M&RA to coordinate Safety Plan and respondent locating activities.
? We awaited the actual Year 4 sub-award. In April, we had asked if HJF could provide a statement with the Year 4 sub-award that it does not identify Controlled Unclassified Information (CUI) and that CUI will not be passed between HJF and U-M. We hope to avoid unexpected issues like last year, where language about required CUI handling was included in the sub-award language and it significantly delayed award processing until a clarification statement about the CUI could be provided.
o As of the end of June, we were still spending down the Year 3 award.
? IRB:
o IRB amendments for the biosample flag/administrative data/inventory document public release were approved by the USUHS IRB on June 16.
o The IRB amendment for adding the open-end question and heads-up message experiment was approved by the USUHS IRB on June 23.
? STARRS-affiliated, but not STARRS funded, work:
o VA/HEARTH project:
? IRB approval with one contingency for obtaining a Certificate of Confidentiality (CoC) was received June 21. The CoC from NIH was received June 28 and submitted to the IRB. They removed the contingency and provided full approval on June 29. We sent the approved IRB and materials to Harvard for secondary review on June 29.
? Nancy, Katherine, Margaret and Meredith met June 28 about the interviewer hiring posting, coordination on sample prep, interviewer access to coversheets, and other matters.
? U-M ORSP received the sub-award from Harvard on June 15. They began processing steps and we responded to a question about the sub-contract details on June 30.

Enclave and User Support:
? We continued work on necessary corrections and changes to our processing code related to the 12 NDI non-death records. As we worked on removing the 12 records from NDI deliverables, we provided the 12 MasterIDs to Harvard so they can exclude them from their NDI analyses.
? 2023 repeat NDI search:
o Enclave staff completed the submission file for the annual search.
o We awaited the issue of payment to be resolved by M&RA and HJF/USUHS.
? Standard Enclave activities continued. These include maintaining security requirements; processing background checks and Great Lakes Cluster user access requests, drop box requests, ID swap and data transfer requests; managing software acquisition and updates; and providing user support as needed. Of particular note this month:
o Background check processing took place for a new U-M security analyst.
o Work was completed on the 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. We delivered an updated set of tables which include:
? Unique blood samples across NSS, PPDS, SHOS-A.
? Unique Soldier participation across A-STARRS cohort and case-control studies.
? A note to describe how the number of collected NSS surveys was derived.
? There were no biomarker group requests for assistance in June.

Public Use Data:
? Wave 3:
o Members of the team met with ICPSR on June 2 to review the LSW3 public release timeline and status of tasks/materials.
o We prepared the final dataset including disclosure analysis and discovered that the response categories for the question about the respondent's rank in the Army contain more detail than when last asked during PPDS.
? We reached out to ICPSR to ask if they would recommend collapsing them. They recommended collapsing given STARRS has the data available via secure download in addition to the Virtual Data Enclave (VDE).
? We discussed with Harvard and determined the rank variable should be collapsed the same way as previous public deliverables.
o The LSW3 dataset is on track for delivery to ICPSR in early July.
? Biosample flags, administrative variables, and inventory document:
o IRB approval was received from USUHS. The Enclave team will shift attention to this public deliverable after the LSW3 public deliverable is settled and in ICPSR's hands.
? We awaited decisions from the Army/GSC on producing the genetic and bioassay files for public use and placing data in the NIH National Data Archive and Public use release for GWAS.

Wave 4 Production Updates:
? Wave 4 production statistics, as of July 3, 2023, are as follows:
o Replicates released: 7 of 14 released with 7,327 sample lines.
o Completed interviews: 5,127 (4,836 web; 291 phone).
o Replicate 6 transitioned to Phase 4 on Saturday, June 17. The response rate is currently 71.6% and trending with the average response rate.
o Replicate 7 moved to Phase 3 on June 29 and started receiving phone calls. The response rate is currently 45.9% and also tracking with the average response rate.
o The response rate for completed replicates (Reps 1-5) is 74.9%.

Safety Plan Results:
? The Wave 4 Safety Plan rate is 11.1% as of July 3, as shown in Table 3.

Special Issues	The only change in June was that we removed from consideration the implementation of a Wave 4 incentive experiment. The Wave 4 response rates have improved since Replicates 1 and 2 and are matching our expectations. If there are further waves of data collection, we will want to strongly consider whether an incentive increase is merited.
Cost as of May 31, 2023	*Total Cost to Date (direct + indirect):*
	Est Cost at Completion (E$AC):
	Total Budget:
	Variance (Total Budget minus- E$AC):
	Reason for Variance:

Cost as of May 31, 2023		
Total Cost to Date (direct + indirect):		7,957,245.85
Est Cost at Completion (E$AC):		12,854,229.54
Total Budget:		12,809,390.00
Variance (Total Budget minus- E$AC):		-44,839.54
Reason for Variance:	We spent a total of $248,343 in May. Our projected deficit for the total five-year project is slightly lower at $44,840 (compared to $54,558 in April). We will continue to review project expenses and update our projections based on realized costs and our experiences to date.	

Projections as of May 31, 2023		
Dollars Projected for Month:		327,691.00
Actual Dollars Used:		248,342.60
Variance (Projected minus Actual):		79,348.40
Reason for Variance:	Staff hours were less in many areas, particularly for the May attrition training. In addition, there was an unexpected credit of $24,146 direct ($36,555 total) that appeared as a non-salary "transfer" on the SRO public use task. Bill projected a reversal for that credit and is looking into what this is and whether it will stay as a credit. We also projected some additional management salary in year 5 for reporting.	

Measures		Units at Complete	RR	HPI
	Current Goal:	10,800	75	10.2
	Goal at Completion:	10,800	75	10.2
	Current Actual:	5,127	74.9 (Reps 1-5)	11.7
	Estimate at Complete:	10,800	75	11
	Variance:			

Other Measures

Developmental/Initiative Projects Dashboard

NonArchived Development Initiative and No-DataCol Projects

Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr	May	Jun
TSME 23-Web Portal Documentation/Updates (423463)	Initiatives	Closing	Karl A Dinkelmann	☐	☐	☐	🟢	🟢	🟢
TSME SRO SYS MAINTENANCE-GENERAL(483910)	Initiatives	Implementing	Jeffrey L Smith	🟢	🟢	🟢	🟢	🟢	🟢
TSME23 DCO Tech System Support (483248) FY2023	Initiatives	Implementing	Vivienne Y Outlaw	🟡	🟡	🟡	🟡	🟡	🟡
TSME23 SRO Web Admin Migration (483257)	Initiatives	Initiation	Hueichun Peng	☐	☐	🟡	🟢	🟢	☐
TSME23-PIPPA (425198)	Initiatives	Implementing	Mark Simonson	🟢	🟢	🟢	🟢	🟡	🟡
TSME23-QC-Systems (483249)	Initiatives	Closing	Sarah Elisa Broumand	🟢	🟢	🟢	🟢	🟢	🟢
TSME23-SelfSchedUI (483424)	Initiatives	Closing	Andrew L Hupp	🟢	🟢	🟢	🟢	🟢	🟢
TSME23-Update Report Portal	Initiatives	Implementing	Mark Simonson	☐	☐	☐	🟡	🟡	🟡

Project Name	(TSME 23-Web Portal Documentation/Updates (423463)) TSME 23-Web Portal Documentation/Updates (423463)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 5,000.00	**Indirect Budget:** 0.00	**Total Budget:** 5,000.00
Principal			
Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Karl A Dinkelmann		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor: Gregg Peterson		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	This project's necessity came from a need for an easily maintainable and easily usable Blaise login portal for our web surveys. Each project has unique needs, but many of the portal's functions are similar and shared across all projects. This initiative aims to create a generic template that is easy to alter for project-specific needs; while creating a web portal that is easy to use and maintain so that any developer can apply with minimal effort; additionally, the updated Blaise portal includes standardized logging and documentation.		
SRO Project Period	01/2023 - 06/2023		
Data Col Period			
Security Plan	NA		

Milestones	*Pre Production Start:*	*Pretest Start:*
	Pretest End:	*Recruitment Start:*
	Staffing Complete:	*GIT Start:*
	SS Train Start:	*SS Train End:*
	DC Start:	*DC End:*

Other Project Team Members	Shane Empie, Jude Perillo, and Peter Sparks
Other Project Name	
Sample Mgmt System	NA
Data Col Tool	NA
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	June, 2023 (TSME 23-Web Portal Documentation/Updates (423463))	Closing
Risk Level	On Track	
Monthly Updates	There are no new updates; just updating this project's final cost report numbers. The final underrun was $48.38!	
Special Issues		
Cost as of Jul 19, 2023	*Total Cost to Date (direct + indirect):*	4,951.62
	Est Cost at Completion (E$AC):	4,951.62
	Total Budget:	5,000.00
	Variance (Total Budget minus- E$AC):	48.38
	Reason for Variance:	
Projections as of Jul 19, 2023	*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

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

Other Measures

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	*Pre Production Start:*	*Pretest Start:*
	Pretest End:	*Recruitment Start:*
	Staffing Complete:	*GIT Start:*
	SS Train Start:	*SS Train End:*
	DC Start:	*DC End:*

Other Project Team Members	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	June, 2023 (TSME SRO SYS MAINTENANCE-GENERAL(483910))	Implementing
Risk Level	On Track	
Monthly Updates	ST/PB Build Team meetings - Marsha, Pam, Ashwin, Jeff, Holly, and David Create new GIT projects Test new GIT projects SSL Termination Processing ST Employee Data Merge updates Project Rem Equip Return updates	

Special Issues

Cost as of Jul 12, 2023	Total Cost to Date (direct + indirect):				37,659.76
	Est Cost at Completion (E$AC):				37,659.76
	Total Budget:				20,000.00
	Variance (Total Budget minus- E$AC):				-17,659.76
	Reason for Variance:	See monthly updates			
Projections as of Jul 12, 2023	Dollars Projected for Month:				1,668.46
	Actual Dollars Used:				728.03
	Variance (Projected minus Actual):				940.43
	Reason for Variance:	See monthly updates			

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

Other Measures

Project Name	**(TSME23 DCO Tech System Support (483248) FY2023) TSME23-DCO Tech System Support (483248) 2023**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 35,000.00	**Indirect Budget:** 0.00	**Total Budget:** 35,000.00
Principal			
Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Vivienne Y Outlaw		
	Budget Analyst: Carl S Remmert		
	Production Manager:		
	Senior Project Advisor: Gregg Peterson		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	This includes all the support and development work for a suite of tech systems DCO uses, including Fred, Recruitment Website, Iwer Web Site, etc.		
SRO Project Period	07/2022 - 06/2023		
Data Col Period			
Security Plan	NA		

Milestones		
Pre Production Start:		*Pretest Start:*
Pretest End:		*Recruitment Start:*
Staffing Complete:		*GIT Start:*
SS Train Start:		*SS Train End:*
DC Start:		*DC End:*

Other Project Team Members	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	June, 2023 (TSME23 DCO Tech System	Implementing
Risk Level	Some Concerns	
Monthly Updates	- work on RWA FWA form upload module (collected from FOTY) - HomeArea censue data batch update - Change UM unique and UM email to be lower case (in the UM Download module)	

Special Issues		
Cost as of Jul 19, 2023	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	35,000.00
	Variance (Total Budget minus- E$AC):	35,000.00
	Reason for Variance:	budget insufficient to support department needs
Projections as of Jul 19, 2023	*Dollars Projected for Month:*	2,449.45
	Actual Dollars Used:	-62,871.37
	Variance (Projected minus Actual):	65,320.82

	Reason for Variance:	budget insufficient to support department needs	

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

Other Measures	budget insufficient to support department needs

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

Project Name	**(TSME23-PIPPA (425198)) 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	*Pre Production Start:* *Pretest Start:*
	Pretest End: *Recruitment Start:*
	Staffing Complete: *GIT Start:*
	SS Train Start: *SS Train End:*
	DC Start: *DC End:*
Other Project Team Members	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	June, 2023 (TSME23-PIPPA (425198)) Implementing
Risk Level	Some Concerns
Monthly Updates	Work started in June 2023:

Load ST projects ECHO3M,
HRS202, PSID2019

Load ST projects
 EDC, HCAP, DAWN

Finish adding ranking scoring computations for MSMS projects

Modify Timesheet Hours computation for current MSMS projects:
=>List of Productions hours listed in specs in this document
Add 2 new columns in Iwer Summary Report.
These are the total hours worked during each of the following periods per Iwer
6monthHours: Total sum of Production Hours from CURRENT REPORTING MONTH (MONTH JUST ENDING) to 6 months earlier
12monthHours: Total sum of Production Hours from CURRENT REPORTING MONTH/MONTH JUST ENDING to 12 months earlier

Special Issues

Cost as of Jul 19, 2023	Total Cost to Date (direct + indirect):		0.00
	Est Cost at Completion (E$AC):		0.00
	Total Budget:		10,000.00
	Variance (Total Budget minus- E$AC):		10,000.00
	Reason for Variance:	Unsure	
Projections as of Jul 19, 2023	Dollars Projected for Month:		215.68
	Actual Dollars Used:		-19,161.46
	Variance (Projected minus Actual):		19,377.14
	Reason for Variance:	Unsure	

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

Other Measures

Project Name	**(TSME23-QC-Systems (483249)) TSME23-QC-Systems (483249)**
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives
Budget	**Direct Budget**: 30,000.00 **Indirect Budget:** 0.00 **Total Budget:** 30,000.00
Principal Investigator/Clients	
Funding Agency	
IRB	*HUM#:* *Period of Approval:*
Project Team	*Project Lead:* Sarah Elisa Broumand
	Budget Analyst: Carl S Remmert
	Production Manager:
	Senior Project Advisor: Shonda R Kruger-Ndiaye
	Production Manager 1:
	Production Manager 2:
Proposal #	no data
Description	Project used to maintain and further develop Current QC systems such as OLIVE
SRO Project Period	07/2022 - 06/2023
Data Col Period	
Security Plan	NA

Milestones		
Pre Production Start:		*Pretest Start:*
Pretest End:		*Recruitment Start:*
Staffing Complete:		*GIT Start:*
SS Train Start:		*SS Train End:*
DC Start:		*DC End:*

Other Project Team Members	
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	June, 2023 (TSME23-QC-Systems (483249))	Closing
Risk Level	On Track	
Monthly Updates	June was used mostly to troubleshoot issues with set up for the DAWN suite project and investigating a few issues related to cases not loading into Olive. The issues were resolved. This concludes the year on this effort and went over by less than $300.	
Special Issues		
Cost as of Jul 19, 2023	*Total Cost to Date (direct + indirect):*	29,073.27
	Est Cost at Completion (E$AC):	30,246.27
	Total Budget:	30,000.00
	Variance (Total Budget minus- E$AC):	-246.27
	Reason for Variance: minimal variance	
Projections as of Jul 19, 2023	*Dollars Projected for Month:*	3,657.84
	Actual Dollars Used:	1,173.00
	Variance (Projected minus Actual):	2,484.84

	Reason for Variance:	Initially we anticipated a spike of work on the last month, but due to the technical requirements it was decided to not implement the task and go for a cheaper solution.

Measures

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

Other Measures

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

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	*Pre Production Start:*	*Pretest Start:*
	Pretest End:	*Recruitment Start:*
	Staffing Complete:	*GIT Start:*
	SS Train Start:	*SS Train End:*
	DC Start:	*DC End:*

Other Project Team Members	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	June, 2023 (TSME23-SelfSchedUI (483424))	Closing
Risk Level	On Track	
Monthly Updates	The few remaining projections are to change the way the open and close variables are specified to accommodate the different hours the SSL is open (rather than a generic setting). That work would be done by Andrew P (modifying the stored procedure that takes that information into account), and Cheng to modify the PQT interface to be able to specify open/close times by day. We will be setting this up in the SRC_Demo_2 project in MSMS to test and have a demonstration project when needed.	
Special Issues		
Cost as of Jul 14, 2023	*Total Cost to Date (direct + indirect):*	16,500.43
	Est Cost at Completion (E$AC):	16,500.43
	Total Budget:	10,000.00
	Variance (Total Budget minus- E$AC):	-6,500.43

	Reason for Variance:	Additional work on the API programming and modification to the scheduling parameter for the SSL. I've spoken with Gregg about overrunning the budget and it was okayed.
Projections as of Jul 14, 2023	*Dollars Projected for Month:*	707.21
	Actual Dollars Used:	2,103.70
	Variance (Projected minus Actual):	-1,396.49
	Reason for Variance:	Projected time for Andrew P. and Cheng to make modifications to open/close times to accommodate the SSL. Peter charged for time spent fixing items for PSID self-scheduling launch.

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

Other Measures

Project Name	**(TSME23-Update Report Portal) Update Report Portal (425201) FY23**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 15,000.00	**Indirect Budget:** 0.00	**Total Budget:** 15,000.00
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	Update Report Portal for MSMS and Olive on the ODS Server as part of the ODS Portal		
SRO Project Period	01/1996 - 01/1996		
Data Col Period			
Security Plan	NA		

Milestones	*Pre Production Start:*	*Pretest Start:*
	Pretest End:	*Recruitment Start:*
	Staffing Complete:	*GIT Start:*
	SS Train Start:	*SS Train End:*
	DC Start:	*DC End:*

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	June, 2023 (TSME23-Update Report Portal)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Discussions with project teams about new portal and testing of portal made available for all. Update on hold.	
Special Issues		

Cost as of Jul 19, 2023	*Total Cost to Date (direct + indirect):*		0.00
	Est Cost at Completion (E$AC):		0.00
	Total Budget:		15,000.00
	Variance (Total Budget minus- E$AC):		30,000.00
	Reason for Variance:	None	
Projections as of Jul 19, 2023	*Dollars Projected for Month:*		2,497.62
	Actual Dollars Used:		-23,936.50
	Variance (Projected minus Actual):		26,434.12
	Reason for Variance:	None	

Measures

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

Other Measures

Measures

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

Other Measures