Survey Research Operations

Monthly Project Report

Sponsored Data Collection Projects and Development Initiative

March 2023

Sponsored Data Collection Projects and Development Initiative Projects

(AFHS) American Family Health Study

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

(BFY) Baby's First Years

(BHM Library Project) Developing a Model of Black History Month Programming in Public Libraries

(CARE Military) Concussion Assessment, Research and Education (CARE) Consortium 2022 - Military

(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022

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

(DCUS) Daily Cannabis Use Study

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

(EDC-Endline) Every Dollar Counts Endline

(EDC-SS Phases 3-4) Every Dollar Counts Semi-Structured, Phases 3-4

(HCAP 2022) Healthy Cognitive Aging Project, 2022

(Health and Well Being in SE MI) Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan)

(HRS 2022 Panel & Baselines) Health and Retirement Study 2022 Main Interviews

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

(HRS2022-Screening) HRS 2022 - Screening

(IHDS3) India Human Development Survey Wave 3

(MI CReSS (Year 3)) Michigan COVID-19 Recovery Surveillance Cohort Study

(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027

(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027

(PR-PSID) Puerto Rico Panel Study of Income Dynamics

(PSID CDS 2023) PSID Childhood Development Supplement 2023

(PSID23) Panel Study of Income Dynamics Core 2023

(PSID23 Online Contact Update) Panel Study of Income Dynamics 2023 Online Contact Update

(QoL & Hearing Loss) Quality-of-Life for Amish Children with Hearing Loss

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

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

(TSME23-PIPPA) PIPPA 2.0 (425198) FY23

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

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

Sponsored Projects Dashboard

NonArchived Sponsored Projects

Project	Type	Phase	Project Lead	Jan	Feb	Mar
AFHS	Sponsored	Closing	Rebecca Gatward	🟢	🟢	🟢
AFHS-Additional work	Sponsored	Implementing	Rebecca Gatward	🟢	🟢	🟢
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	🟢	🟢	🟢
CRUSE - AHDFS	Sponsored	Implementing	Piotr Dworak	🟢	🟡	🟢
DCUS	Sponsored	Planning	Gary Hein	⬜	🟢	🟢
ECHO (Year 7)	Sponsored	Implementing	Shonda R Kruger-Ndiaye	🟢	🟢	🟢
EDC-Endline	Sponsored	Implementing	Karin Schneider	🟢	🟢	🟢
EDC-SS Phases 3-4	Sponsored	Closing	Karin Schneider	🟢	🟢	🟢
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 HOC	Sponsored	Planning	Gloria J Baker	🟢	🟢	🟢
HRS2022-Screening	Sponsored	Implementing	Evanthia Leissou	🟡	🟡	🟡
IHDS3	Sponsored	Implementing	Sarah Elisa Broumand	🟡	🟡	🟡
MI CReSS (Year 3)	Sponsored	Implementing	Sarah Elisa Broumand	🟢	🟢	🟢
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	Initiation	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.		

Description (continued):

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	Mar, 2023 (AFHS)	Closing
Risk Level	On Track	
Monthly Updates	March update Since last month the overspend on the main AFHS project decreased due to a refund for voided cheques. Current SRO focus: Work on the two additional components, AFHS Panel Feasibility Survey and AFHS non-response follow-up has been completed. Any hours spent on AFHS tasks (projected just for Me, Colette and Dean) are being charged to the AFHS Feasibility budget. These are reported on separately in MPR.	
Special Issues	The additional scope (panel feasibility and non-response follow-up) will be funded using sequestered funds (on a separate short code). The PI group have also agreed to fund the overspend on the main AFHS budget.	

Cost as of Apr 07, 2023		
Total Cost to Date (direct + indirect):		2,508,389.72
Est Cost at Completion (E$AC):		2,508,389.72
Total Budget:		2,490,133.00
Variance (Total Budget minus- E$AC):		-18,256.72
Reason for Variance:	March 2023 update - Since last month the overspend on the main AFHS project decreased by $240 due to a refund for uncashed cheques. This overspend will be funded using sequestering funds.	

Projections as of Apr 07, 2023		
Dollars Projected for Month:		0.00
Actual Dollars Used:		-218.40
Variance (Projected minus Actual):		218.40
Reason for Variance:	Any additional spend will be charged to the short code for the 'AFHS additional work' - the overspend from the main AFHS and the additional work are being funded by sequestering funds. The overspend is decreasing due to reversed respondent checks that were issued 12 months ago and not cashed.	

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

Other Measures

Project Name	**(AFHS-Additional work) American Family Health Study - additional work**		
Project Mode	Primary: Web Secondary: Mail Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 50,265.00	**Indirect Budget:** 0.00	**Total Budget:** 50,265.00
Principal Investigator/Clients	Brady West (SRC)		
Funding Agency	Internal UM sequestering funds		
IRB	**HUM#:** HUM00167171		**Period of Approval:**
Project Team	**Project Lead:** Rebecca Gatward		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lloyd Fate Hemingway		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	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	Mar, 2023 (AFHS-Additional work)	Implementing
Risk Level	On Track	
Monthly Updates	March updates SRO involvement is now minimal - responding to queries from a group of students working on data documentation and preparation of a data file to pass to ICPSR for review and further work (although an initial file will be 'launched' at the PAA conference in April. This work includes creating a draft codebook and merging 'IsVisited' data so missing values are appropriately assigned as 'refusal' or 'does not apply' for question and computed variables. The PI group are expecting to submit a new research proposal for the AFHS Panel in July 2023 and a state level project in October 2023. SRO is awaiting design decisions by the PI group to proceed further with the budget.	
Special Issues		
Cost as of Apr 07, 2023	*Total Cost to Date (direct + indirect):*	57,279.22
	Est Cost at Completion (E$AC):	63,214.56
	Total Budget:	50,265.00
	Variance (Total Budget minus- E$AC):	-12,949.56
	Reason for Variance:	AFHS Feasibility Pilot Estimate – Expanded SRO # 22-0037R01 (Estimated costs at $47,000 - $53,000 direct costs. This estimate assumes that funding would be provided from UM internal sequestering funds and includes no indirect costs). The total cost at completion for the feasibility work is still within the budgeted estimate ($47k-$53k). Hours for Colette and I have been added to provide minimal support (up to 6hrs/mth) until Sept'23 which raises the amount to be covered by sequestering funds by an additional ~$7,000. An updated summary of costs to be funded by sequestering funds is attached.
Projections as of Apr 07, 2023	*Dollars Projected for Month:*	986.13
	Actual Dollars Used:	3,032.92
	Variance (Projected minus Actual):	-2,046.79
	Reason for Variance:	Colette and I have up 6 hrs projected a month between now and September 2023 for any adhoc requests and meeting attendance (me)

- we will only use these hours as needed and hours used will vary by month. In March Since last month the overspend on the main AFHS project decreased from $11,844 to $11,704 due to a refund of $240 for uncashed check.

The overall spend across both projects (main and feasibility) funded by the sequestering funds is now $74,918. The main costs charged to the feasibility account in March were some hours used by Jenna Tyson to design materials for the PAA booth and a check that had to be reissued to DataForce (because an attempt was made to fraudulently cash the original check).

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

Other Measures

Project Name	(BFY) Baby's First Years		
Project Mode	Primary: Face to Face Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 5,056,486.00	**Indirect Budget:** 1,930,263.73	**Total Budget:** 6,986,749.73
Principal	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	Mar, 2023 (BFY)	Implementing
Risk Level	On Track	
Monthly Updates	Project updates:	

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 continue conducting the Age3 + 3-month, +6-month, and +10-month check-in calls or visits to confirm and update contact information and invite respondent to a lab visit conducted by the PI research teams at Age 4. At Age 3 + 10-month we handing the cases off to the local lab research teams. The process continues to run smoothly; as of 2/17 we have handed off 743 of 1,000 cases.

PIs confirmed they will require U-M Interviewers assistance through the end of the Age 4 which they are planning to extend through July 31, 2023. PIs have also reached out to project SPA to discuss ongoing assistance with locating in Ages 5 through 8.
 The details of this engagement are being worked out but will require retaining the current data collection staff at the current fraction to support this effort in the next 4 years.

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 ~ 50 cases so far with a goal to find and invite to the lab and will ingest more around the holidays.

The goal is to confirm contact information with at least 95% of cases. So far...

@ 3 month check-in 96% were confirmed
@ 6 month 92% were confirmed
@ 10 month 96% were confirmed and 844 cases were delivered to the lab

We are currently preparing for a locating trip to NOLA to assist the site which is struggling the most in reaching the lab cooperation goals.

Age 3 Staffing:
12 iwers in total
NE: 1 OS + 1 NH (Trained 9/15)
MN: 2
NY: 4 OS (1 consolidated in October 2022)
NOLA: 1 (1 June resignation)
TLs: 1 (- 1 has gone to HRS)

Technical system:
All tech systems are working as needed.

Finances:
A notification was sent to the PIs on 1/20 estimating the total expected underrun may reach ~ $300K. PIs are working on extending the PG end date to allow for spending the total funding and considering how to allocate the money.

Special Issues

Cost as of Apr 17, 2023	Total Cost to Date (direct + indirect):		6,486,304.41
	Est Cost at Completion (E$AC):		6,687,749.47
	Total Budget:		6,986,749.73
	Variance (Total Budget minus- E$AC):		299,000.26
	Reason for Variance:	In January, we have adjusted the budget to realize all potential sources of underrun given the current scope and communicated underrun nearing ~ $300K to the PIs. This resulted in extending the Valhalla funding period through 12/31/2023 allowing potential extension of U-M involvement with the project. However, the decision about how to use the underrun still rests with the PIs.	
Projections as of Apr 17, 2023	Dollars Projected for Month:		57,385.85
	Actual Dollars Used:		39,216.02
	Variance (Projected minus Actual):		18,169.83
	Reason for Variance:	Production is decreasing towards the end of the wave as seen in lower iwer hours and we continue to have savings in the project management time.	

Measures

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

Other Measures

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

Milestones		
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	Mar, 2023 (BHM Library Project)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Some difficulty in getting concrete decisions from research team on sample exclusions. Difficulty thinking through how current climate may impact outreach to libraries, especially in states with hostility to BHM and related efforts to recognize minority cultures.		
Special Issues	See above.		
Cost as of Apr 17, 2023	*Total Cost to Date (direct + indirect):*		7,047.10
	Est Cost at Completion (E$AC):		197,127.00
	Total Budget:		197,671.00
	Variance (Total Budget minus- E$AC):		544.00
	Reason for Variance:	NA	
Projections as of Apr 17, 2023	*Dollars Projected for Month:*		19,277.52
	Actual Dollars Used:		3,073.00

| | Variance (Projected minus Actual): | | | 16,204.52 |
| | Reason for Variance: | Over-projected effort for this month. Raphael did not really charge anything. All projections are moved forward. Just delayed in getting decisions on sampling and outreach design from PI. | | |

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:			

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	Mar, 2023 (CARE Military) Implementing
Risk Level	On Track
Monthly Updates	1. Project Management: SRO is expecting to receive additional fund $260K total to continue military data collection beyond May 2023. The

Sample size will not be increased per the initial agreement with the additional funding.
Donnalee continues the dialogue with UM PI to discuss endgame strategies and to plan for the next round of data collection.
We also continue to discuss the locating reports with the Locating Team for its accuracy.

2. Care SMS system update:
SRO continues to encounter and resolve system related issues brought by respondents and interviewers and locating team.
SRO continues coordinating ISR System testing with QG to prepare the upcoming production period.

3. Questionnaire Development:
SRO is going to test the modified surveys as soon as they are ready.

4. Production:
SRO has reached the goal of 3000 completed interviews before the schedule.
A plan to extend the effort of sending the emails to respondents by using UM Gmail by all interviewers is in the work.
Production managers and TLs continue to conduct biweekly field calls for additional training as needed.
Production Stats as of 03/31/2023: Goal 3000
12786 Released: Total Comp Iws-3050-24% (Web-3007 -23.6%, CATI-43 -0.3%)

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

6. DMSS:
SRO continues to resolve inaccurate reports from Datalys since January 2023.
SRO started data clean up conversation with Datalys and requested more guideline for the codebook.

7. Locating:
The Locating team continues to use the full spectrum of messages approved by IRB to communicate with the respondents.
Military find rate: 528 found/ 1135(ever Loc) = 46.52%

Special Issues

Cost as of Mar 31, 2023	*Total Cost to Date (direct + indirect):*		1,212,430.66
	Est Cost at Completion (E$AC):		1,358,047.03
	Total Budget:		1,426,001.00
	Variance (Total Budget minus- E$AC):		67,953.97
	Reason for Variance:	A lot of work on military have not been reflected to the current cost report. We have been making adjustment to reduce the underrun through the next few months.	
Projections as of Mar 31, 2023	*Dollars Projected for Month:*		142,663.76
	Actual Dollars Used:		143,128.09
	Variance (Projected minus Actual):		-464.33
	Reason for Variance:		

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

Other Measures

Project Name	**(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022**
Project Mode	Primary: Telephone Secondary: Web Total of Modes: 2
Project Type	Sponsored Projects
Budget	**Direct Budget**: 3,718,978.00 **Indirect Budget:** 966,936.00 **Total Budget:** 4,685,914.00
Principal	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	Mar, 2023 (CARE SALTOS MTEC)	Implementing
Risk Level	On Track	

Monthly Updates	1. Project Management: SRO continues to prioritize specific target groups to reach the goals of production. Donnalee continues the dialogue with UM PI to discuss endgame strategies and to plan for the next round of data collection. Donnalee is still waiting for QG to deliver the data on Social Media platforms performance in order to evaluate the efficiency of using them. SRO continues to discuss the locating reports with the Locating Team for its accuracy. SRO is working with the CARE team on managing sample transferring situation in order to maintain sample accuracy. 2. Care SMS system update: A decision of a downtime (break) between the current wave and the next wave is two weeks instead of one month as previously proposed. SRO is working a plan to make the transition. SRO continues to work closely with QuesGen on system new features requesting, updating, modifying, and testing activities (such as the ability to see all the note data by using the hover feature) as well as finding ways to improve respondent Payment tab functionality in the system. In the meantime, SRO continues to encounter and resolve system related issues brought by respondents and interviewers and locating team. SRO continues coordinating ISR System testing with QG to prepare the upcoming production period. 3. Questionnaire Development: SRO is going to test the modified surveys as soon as they are ready. 4. Production: SRO continue to strategize towards the goal of 3200 civilian cases by the end of data collection in April 2023. SRO continue to find ways to launch more interviewer production challenges for the next few month. A plan to extend the effort of sending the emails to respondents by using UM Gmail by all interviewers is in the work. Production managers and TLs continue to conduct biweekly field calls for additional training as needed. Production Stats as of 03/31/2023: 13039 Released: Total Comp Iws-2930 – 22.6% (Web-2888 -22.2%, CATI-42-0.3%) 5. Hiring and Training: We start to prepare the remote Interviewer refresh training in May 2023 ((May 17 through May 19) that will focus on reinforcing field protocols and explaining system and survey questionnaire updates. 6. DMSS: SRO continues to resolve inaccurate reports from Datalys since January 2023. SRO started data clean up conversation with Datalys and requested more guideline for the codebook. 7. Locating: The Locating team continues to use the full spectrum of messages approved by IRB to communicate with the respondents. Civilian find rate: 302 found/ 695 (ever loc) = 43.45%

Special Issues

Cost as of Mar 31, 2023	*Total Cost to Date (direct + indirect):*	1,015,057.56
	Est Cost at Completion (E$AC):	4,515,167.57
	Total Budget:	4,685,914.00
	Variance (Total Budget minus- E$AC):	170,746.43
	Reason for Variance:	
Projections as of Mar 31, 2023	*Dollars Projected for Month:*	78,057.31
	Actual Dollars Used:	45,007.92
	Variance (Projected minus Actual):	33,049.39
	Reason for Variance:	

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

Other Measures

Project Name	(CRUSE - AHDFS) Survey on Crypto-Asset Adoption and Use / American Household Digital Finance Survey		
Project Mode	Primary: Web Secondary: Focus Group Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 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	Mar, 2023 (CRUSE - AHDFS)	Implementing
Risk Level	On Track	
Monthly Updates		

Crypto had exceeded the goal after adding sample. We currently have 1,764 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 Apr 17, 2023	*Total Cost to Date (direct + indirect):*		442,471.27
	Est Cost at Completion (E$AC):		517,055.12
	Total Budget:		606,052.00
	Variance (Total Budget minus- E$AC):		88,996.88
	Reason for Variance:	Underrun is mostly due to savings in management and tech costs as well as not reaching the projected iwer hours. Lower actual hours allowed us to extend the lab involvement through mid-March and fund additional sample required to meet the goal.	
Projections as of Apr 17, 2023	*Dollars Projected for Month:*		105,539.72
	Actual Dollars Used:		39,449.38
	Variance (Projected minus Actual):		66,090.34
	Reason for Variance:	Additional PO for the vendor was added March but will be paid in April. We are also not using the full extent of the budgeted SSL and Tech hours and PM hours.	

Measures

	Units at Complete	RR	HPI
Current Goal:	1529	14.9%	
Goal at Completion:	1529	14.9%	
Current Actual:	1764	14.7%	
Estimate at Complete:	1764	14.9%	
Variance:			

Other Measures

Project Name	(DCUS) Daily Cannabis Use Study		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 41,311.46	**Indirect Budget:** 0.00	**Total Budget:** 41,311.46
Principal	Brady West (ISR)		
Investigator/Clients	Sean McCabe (ISR)		
Funding Agency	National Institutes of Health (NIH)		
IRB	**HUM#:** HUM00229404		**Period of Approval:** Pending
Project Team	**Project Lead:** Gary Hein		
	Budget Analyst: David Kellermeyer		
	Production Manager:		
	Senior Project Advisor: Rebecca Gatward		
	Production Manager 1: Rebecca Loomis		
	Production Manager 2:		
Proposal #	no data		
Description	This study aims to decipher the daily motives for cannabis use among light and heavy cannabis users, and their associations for longer-term use behaviors. We will recruit 50 cannabis users via the 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:**	
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	Mar, 2023 (DCUS)		Planning
Risk Level	On Track		
Monthly Updates	All hours in March spent in pre-production working on: 1- Writing and submitting requested IRB revisions. 2- Meeting with PIs and SRO team to discuss the project design based on IRB requested revisions 3- Project team meetings. Discussed reporting and data management plan. 4- Programming. Programmed screener survey.		
Special Issues			
Cost as of Apr 19, 2023	**Total Cost to Date (direct + indirect):**		4,126.92
	Est Cost at Completion (E$AC):		26,593.95

	Total Budget:	41,311.46	
	Variance (Total Budget minus- E$AC):	22,597.51	
	Reason for Variance:	Differences in between proposed and projected scope:	

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 Apr 19, 2023	**Dollars Projected for Month:**	3,618.06
	Actual Dollars Used:	3,618.06
	Variance (Projected minus Actual):	0.00
	Reason for Variance:	None

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	50	75%	N/A
	Goal at Completion:	50	75%	N/A
	Current Actual:	N/A	N/A	N/A
	Estimate at Complete:	50	75%	N/A
	Variance:	0	0%	N/A

Other Measures

Project Name	**(ECHO (Year 7)) Environmental Influences on Child Health Outcomes**		
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 384,033.00	**Indirect Budget:** 215,058.00	**Total Budget:** 599,091.00
Principal	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	Mar, 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 4/41/23

[Phase 2: 3-Month Data Collection]

   3-month sample released: 1039
   3-month interviews completed: 754
Average attempts / Iw: 7.6
  Iw length: 36 min
  Response Rate: 73%
  3-month biospecimen collected: 428

[Phase 3: Age 4 REDCap Survey]

  Age-4 sample released: 349
  REDCap surveys completed: 240
  Response Rate: 69%

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

  Age-4 IPV sample released: 191
  In-person visits completed: 58

Special Issues	SRO is still working with MSU to define close out procedures for each component. MSU doesn't yet know if it will receive funding to continue any aspect of data collection beyond August. Regardless, any continuation would be without SRO.

Cost as of Apr 20, 2023	*Total Cost to Date (direct + indirect):*	253,256.99
	Est Cost at Completion (E$AC):	524,549.58
	Total Budget:	599,091.00
	Variance (Total Budget minus- E$AC):	74,541.42
	Reason for Variance:	The biggest driver of our projected underrun is management, which is reflective of staffing constraints in PDMG and the lean/distributed leadership model we adopted. Several non-sal categories also came in low. The largest of these was hosting due to our canceled iwer training.

As of 4/21 we and the PI agreed to transfer $47,125 (dir) to the U-M lab doing the bloodspot analysis. We'll continue monthly cost review and raise warnings if costs are coming in high. In the event that SRO actuals exceed costs, the U-M PI has agreed to cover up to $5,000.

Projections as of Apr 20, 2023	Dollars Projected for Month:			41,367.26
	Actual Dollars Used:			40,606.54
	Variance (Projected minus Actual):			760.72
	Reason for Variance:	Trivial monthly variance		

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	Mar, 2023 (EDC-Endline)	Implementing
Risk Level	On Track	
Monthly Updates	Training complete, although we did lost some interviewers during training, 29 field staff started production interviewing at the very end of the month.	
Special Issues	Still no update on NIH funding.	

Cost as of Apr 17, 2023	*Total Cost to Date (direct + indirect):*	358,523.11
	Est Cost at Completion (E$AC):	1,632,877.16
	Total Budget:	3,097,511.00
	Variance (Total Budget minus- E$AC):	1,464,633.84
	Reason for Variance:	See previous months' reports -- we added to the underrun somewhat this month.

Projections as of Apr 17, 2023	*Dollars Projected for Month:*	137,555.54
	Actual Dollars Used:	108,128.01
	Variance (Projected minus Actual):	29,427.53
	Reason for Variance:	Hourly: We over-projected staff when they did not have as much availability to charge the project (Anna Fuqua-Smith was the exception as she was working both on training and on questionnaire translation). • Ashanti was 89 hours under projections • Survey Specialist Senior hours were 83 hours under overall • Admin Asst time was 47 hours under projections • Anna Fuqua-Smith was 75 hours over projections Hours variance for the month was 114.94 hours under projections. Non Salary was mixed, we did overrun some monthly projections (but do not anticipate overruning the duplicating or freight charges for the project): • Telephone Admin fees: Projections aren't in place until April so this started a month earlier than we were expecting. $1,604.17 • Freight: $1,141.07 over projections • Duplicating/Printing/Reproduction was $500 over projections.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	2905	95	3.0
	Goal at Completion:	2905	95	3.0
	Current Actual:			3.1
	Estimate at Complete:			
	Variance:			

Other Measures

Project Name	**(EDC-SS Phases 3-4) Every Dollar Counts Semi-Structured, Phases 3-4**		
Project Mode	Primary: Telephone Secondary: Face to Face Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 314,566.00	**Indirect Budget:** 94,369.00	**Total Budget:** 408,935.00
Principal	Jessica Wiederspan (OpenResearchLab)		
Investigator/Clients	Elizabeth Rhodes (OpenResearchLab)		
Funding Agency	OpenResearchLab		
IRB	*HUM#:* HUM00164105		*Period of Approval:* 1/1/2022-12/31/2022
Project Team	*Project Lead:* Karin Schneider		
	Budget Analyst: Megan Gomez-Mesquita		
	Production Manager: Barbara Aghababian-Homburg		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	Semi-Structured (Qualitative) interviews of a panel of respondents to the larger EDC Baseline/Midline studies. The same respondents are asked to do six qualitative interviews over the course of the three-year EDC program (1-1.5 hour iws). Phases 3 and 4 are separated by eight months. Phase 3 conducted by phone from November 2021 - January 2022. Phase 4 is planned as in-person starting in August 2022 and running through the end of the calendar year. SRO sample is 129 cases. 122 were successfully interviewed for Phase 3 (two cases are presently being confirmed by the ORL (PI) team as incarcerated or deceased). Kirsten Alcser was SPA for Phase 3.		
SRO Project Period	10/2021 - 01/2023		
Data Col Period	11/2021 - 12/2022		
Security Plan	NA		

Milestones	*Pre Production Start:*	*Pretest Start:*
	Pretest End:	*Recruitment Start:*
	Staffing Complete:	*GIT Start:*
	SS Train Start:	*SS Train End:*
	DC Start:	*DC End:* 01/31/2023

Other Project Team Members	Ashwin Dey, Becky Loomis, Andrea Pearce, Marsha Skoman, Peter Sparks, Stephanie Windisch	
Other Project Name	"Phase 3/4" is often referred to as "Round 3/4"	
Sample Mgmt System	SurveyTrak	
Data Col Tool	Blaise 4.8	
Hardware	Laptop; [UM cell] Phone	
DE Software	N/A	
QC Recording Tool	DRI-CXM	
Incentive	Yes, R	
Administration	SRO Group	
Payment Type	NA	
Payment Method	Check through other system (API through STrak to PI's payment system)	

Report Period	Mar, 2023 (EDC-SS Phases 3-4)	Closing
Risk Level	On Track	
Monthly Updates	Will archive project	
Special Issues		
Cost as of Apr 17, 2023	*Total Cost to Date (direct + indirect):*	316,308.03
	Est Cost at Completion (E$AC):	316,188.99
	Total Budget:	408,935.00
	Variance (Total Budget minus- E$AC):	92,746.01
	Reason for Variance: No charges this month.	
Projections as of Apr 17, 2023	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	197.72

		Variance (Projected minus Actual):		-197.72

	Reason for Variance:	No charges this month, just an adjustment for a mis-coded charge.

Measures

		Units at Complete	RR	HPI
	Current Goal:	117	95	
	Goal at Completion:	117	95	
	Current Actual:			
	Estimate at Complete:			
	Variance:			

Other Measures

		Variance (Projected minus Actual):		-197.72

	Reason for Variance:	No charges this month, just an adjustment for a mis-coded charge.

Measures

		Units at Complete	RR	HPI
	Current Goal:	117	95	
	Goal at Completion:	117	95	
	Current Actual:			
	Estimate at Complete:			

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:* 08/31/2023

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	Mar, 2023 (HCAP 2022)	Implementing
Risk Level	Some Concerns	
Monthly Updates	HCAP production has been underway for 39 weeks. As of this morning, 3,019 interviews have been completed, including 1,651 R and 1,368 Inf. There are currently 265 appts (179 R, 86 Inf). The overall HPI is 4.83. 217 Spanish interviews have been completed (125 R, 92 Inf). There are currently 27 interviewers on staff. 843 more R sample lines were released to Iwers on April 3.	
	We shared 3 cost to close scenarios with the PI, showing effort and RRs of the 3 sample groups, and estimated yield and cost. The PI chose Scenario 2 with a 71% RR. CRS was updated to reflect updated costs. Field goals were updated as well. It seems that HRS is completing at a slower rate than originally anticipated, and it seems at this point that HCAP sample size will be closer to 4,300 rather than 4,600. As a result, a 4th scenario has been created in which we assume sample continues to come to HCAP at the rate it has been. We will continue to monitor this closely so that we can project the most accurate yield and cost to close as possible.	
	The PI has shared that it is possible for the project to identify an additional 100k to help boost production. We are recommending another small Iwer training (5-8 Iwers), as well as extending to at least end of Sept. HCAP was originally ending end of August, but since HRS is collecting data through the end of July we will need a little more	

time to work the HRS sample toward the end. The PI is reviewing these updated estimates and suggestions.
The IRB amendment to allow verbal phone consent for informants has been approved. Systems have been updated to reflect the verbal consent in Blaise, as well as record of Iwers mailing the newly approved Informant brochure to Infs whose iws are not completed immediately after the R interview. The brochures are currently at the printer and will be mailed to Iwers hopefully by the beginning of next week. Once Iwers receive the brochures, the new pbd and data model will be released to the field.

The HRS WBD PI has requested to add a new sample type to the WBD verbal consent process, Proxies with no cognitive impairment. The tech team has discussed this and we believe the least intrusive way to introduce this is for this to be a manual process since numbers are very small. These sample will be identified in Surveytrak, and at the end of the HCAP iw the Iwer will ask them for verbal WBD consent. HCAP will provide the SID to HRS for follow-up scheduling with ExamOne. The IRB Amendment for this was submitted this morning.

Special Issues	Production training and production launch were postponed to Summer, 2022 due global pandemic. We are projecting an overrun due to the factors outlined in the 'Monthly Updates' section.
Cost as of Apr 16, 2023	***Total Cost to Date (direct + indirect):***	2,803,951.99
	Est Cost at Completion (E$AC):	4,719,013.70
	Total Budget:	4,488,000.00
	Variance (Total Budget minus- E$AC):	-231,013.70
	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.
Projections as of Apr 16, 2023	***Dollars Projected for Month:***	286,827.02
	Actual Dollars Used:	260,629.53
	Variance (Projected minus Actual):	26,197.49
	Reason for Variance:	Iwer hours were lower than projected. Staff ooto has been updated to the best of our knowledge.

Measures		Units at Complete	RR	HPI
	Current Goal:		71%	4.8
	Goal at Completion:	6338	71%	
	Current Actual:	3019	48%	4.82
	Estimate at Complete:		71%	
	Variance:			
Other Measures	Goals and actuals include R + Inf iws.			

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

Milestones			
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	Mar, 2023 (Health and Well Being in SE MI)	Implementing
Risk Level	Attention!	
Monthly Updates	During March 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 • Procurement o Conducted procurement for study supplies for both D-Amp and SRS. Supplies were purchased for kitting and shipped to the kitting vendor. o Supplies for interviewer duffle bags were procured and shipped to Ann Arbor. • Technical systems & Questionnaires o Developed specifications for the education and employment sections of the questionnaire – presented to the	

research team. Worked to finalize specifications for the main questionnaire, clarify skip patterns.
o Finalized updates to the informant questionnaire and observations programming specifications.
o Began updates to the Arabic informant questionnaire, QxQs and respondent booklet.
o Finalized initial Blaise specifications for programmers. Updated the respondent booklets and QxQ programming specifications.
o Conducted rounds of testing on the screener application.
• Training preparation
o Reviewed and revised study-specific training agenda.
o Began drafting project management chapters.

Task 2: Sampling
• Reviewing potential dashboard designs.
• Began preparation of the D-Amp and SRS sample.

Task 3: Questionnaire Development
• See Task 1 for activities completed by the management team

Task 4: CAI Programming
• Programmed combined screener, fixed bugs.
• Programmed initial changes to informant interview.
• Began programming the Main survey, physical measures & biomarkers, and cognition sections.

Task 5: Systems Programming
• Finalized updates to the 2020 D-Amp sample management systems to update to the most current version of SurveyTrak.
• Began programming updates to the SurveyTrak screener project to allow it to create sample lines for both D-Amp and SRS.
• Began programming changes to SurveyTrak Main D-Amp project.

Tasks 6, 7: Interviewer Recruitment & Hiring, Training
• Facilities
o Contacted sites to obtain bids for July training space. Re-issued RFP
• Interviewer recruitment
o Processed hiring paperwork for Team Leaders and Production Coordinator
o Updated flyers for new hire postings
o Conducted outreach to local organizations to post flyers
o Evaluated applications, conducted 1st and second interviews for candidates
o Assessed and certified bilingual interviewers

Task 8: Main Data Collection
• See Task 1 for procurement activities

Task 9: Post Collection Processing
• No activity this month

Task 10: Weighting
• No activity this month

Task 11: Final Data Deliverables
• No activity this month

Special Issues	Areas Needing Special Attention
	Schedule
	o The project is well-behind schedule for programming, testing and other study preparation tasks due to low staffing at the study start up, which delayed completion of specifications and other items. Documentation for training (such as a project manual) will likely not be ready for training. Instruments were not received for testing until 4/20/2023.
	Programming is running behind schedule due to the complexity of the specification changes, issues with SurveyTrak complexity, and issues with capacity.
	? 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. These items are necessary for training.
	? 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.
	• Financial:
	o Although not reflected in March financials, hours charged in April indicate that Blaise programming will be over budget 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.
	o Although not reflected in March financials, hours charged in April indicate that SurveyTrak programming will likely be over budget due to the unexpected complexity of the screener project programming, which generates sample lines for two studies. It was also more difficult that expected to resurrect programming from 2019/2020 and update to the most current version of SurveyTrak.
	o SRO is carefully monitoring programming progress and cost. At this time, some line items currently have slack (such as project management & supplies) that will be able to absorb modest overruns on other line items.

Cost as of Apr 17, 2023	*Total Cost to Date (direct + indirect):*	1,123,948.95
	Est Cost at Completion (E$AC):	3,755,172.43
	Total Budget:	3,758,127.00
	Variance (Total Budget minus- E$AC):	2,954.57

	Reason for Variance:	The variance is insignificant at this time.
Projections as of Apr 17, 2023	*Dollars Projected for Month:*	93,738.42
	Actual Dollars Used:	66,879.06
	Variance (Projected minus Actual):	26,859.36
	Reason for Variance:	Most of the staff on the project did not charge projected hours due to work on other projects. A majority of the work is being done by exempt staff working over 40 hours. Orders for study supplies were submitted late due to lack of staffing for this work.

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:			
	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:* 9/8/2021 to 9/7/2022
Project Team	*Project Lead:* Evanthia Leissou		
	Budget Analyst: Richard Warren Krause		
	Production Manager: Andrea Sims		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Deborah Zivan		
	Production Manager 2: Jennifer C Arrieta		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.		
SRO Project Period	01/2021 - 09/2023		
Data Col Period	03/2022 - 07/2023		
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:* 07/29/2024

Other Project Team Members	Derek Dubuque (Production Manager), Andrea Sims (Production Manager), Theresa Camello (Production Manager), Taghreid Lovell (Production Manager), Milagros Hierro (Production Manager), Deborah Zivan (Project Manager), Andrew Hupp (Project Manager), Gary Hein (Project Manager), Erin McSpadden (Project Manager), Daniah Buageila (Project Manager), Janet McBride (Project Assistant), Paul Burton (Stats/Sampling), Vanessa Clarke (Project Assistant), Jeannie Baker (Project Manager), Melissa Luker (Project Assistant), Anthony Romanowski (Project Manager), Megan Hromco (Project Assistant). Kristen Cross (Project Assistant), Austin De Spirito (Project Assistant)
	Tech Team: Karl Dinkelmann, Jeff Smith, Jim Rodgers, Laura Yoder, Marsha Skoman, Ashwin Dey, Pam Swanson, David Bolt, Deb Wilson, Jennie Williams, Rose Zybdel, Stephanie Windisch, Holly Ackerman, Shane Empie, Kelly Chatain, Brianna Sabol
	Coding Lead: Carolyn Vieira-Martinez

Other Project Name	HRS 2022 Main Iws
Sample Mgmt System	SurveyTrak; MSMS
Data Col Tool	Blaise 5
Hardware	Laptop; [UM cell] Phone; Paper and Pencil
DE Software	Other (Blaise 5 Coding Application); External vendor (DataForce Scanning SAQs)
QC Recording Tool	Camtasia
Incentive	Yes, R; Yes, INF
Administration	NA
Payment Type	Check, prepaid (80.00); Check, post ($50 (WBD), $20 (SAQ))
Payment Method	Check through STrak RPay System; Check through other system (Rpay system set up for MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (Rpay system set up for MSMS); Imprest Cash Fund from ISR Business Office (Rpay system set up for MSMS)

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

- Minimal technical updates made to SurveyTrak, Weblog, WebTrak, MSMS, and reports.
- Limited effort protocol continues with minimal impact to the field staff (651 SIDs pulled from field as of 4/17/23).
- Onboarding and home study for April training concluded. As of 4/17, 112 trainees are scheduled to attend (original goal was 147)
- Priority/Increased token flagging of Panel and EgenX sample and non-priority Panel eFTF mode switch protocols continued. As of 4/17/23, 15% of the 3006 high priority cases have completed an interview; 6% of the 1,381 Panel eFTF mode switch cases have completed an interview.

*As of 4/17/23, the "measures" table reflects both Panel and Baseline interviews combined.

Special Issues	- Concerns about meeting Panel interviewing goals even with the additional three months of field time due to current interviewer count and balancing effort with new cohort screening/baseline iws. Project team is working with client on responsive design options to implement to help alleviate this concern. - Multiple Blaise issues that have impacted STrak and MSMS throughout data collection.
Cost as of Apr 17, 2023	**Total Cost to Date (direct + indirect):** 14,439,688.52
	Est Cost at Completion (E$AC): 18,849,608.05
	Total Budget: 19,016,630.00
	Variance (Total Budget minus- E$AC): 167,021.95
	Reason for Variance: CRS is projecting the contingent fringe benefits with the newly approved 10.4% rate to accommodate ACA costs, the $400 signing bonus for field staff, Field interviewer and SurveyTech base rate increase, an extra day added to February production training, the increase in per mile reimbursement for travel. CRS is now using the actual 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 rat. The additional interviewer hours needed to reach panel interview goals have been applied to CRS.
Projections as of Apr 17, 2023	**Dollars Projected for Month:** 768,329.46
	Actual Dollars Used: 739,335.27
	Variance (Projected minus Actual): 28,994.19
	Reason for Variance: March salary costs were below projections by 12% (total hours under by 2.5%). Non-salary costs were significantly under projections due to unused costs for respondent payments, hosting and advertising. The majority of unused costs were pushed forward to future months.

Measures

	Units at Complete	RR	HPI
Current Goal:	13,328	51%	8.6
Goal at Completion:	22,661	62%	8.2
Current Actual:	13,463	51.4%	9.8
Estimate at Complete:	22,661	62%	11.7
Variance:	0	0	3.5

Other Measures

Panel: Goal RR: 74%, Current RR: 57.9%

2022 Baselines generated from screener: Goal RR: 44%, Current RR: 17.6%

2019 EGenX baselines: Goal RR: 70%, Current RR: 60.7%

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	Mar, 2023 (HRS HOC)	Planning
Risk Level	On Track	
Monthly Updates	During the month of March, - Jeannie participated in meetings with the PI and budget analyst. - Coordinated meetings and communication between HRS and PIs to keep progress moving forward in order to have coding activities begin late spring 2023. - Project is moving forward as expected.	
Special Issues	- Delay of original coding work scope to now begin in late Spring 2023 - PI with the most coding experience/knowledge left the organization shortly after start of project - SRO's staff member with the most HRS coding experience/knowledge informed project team in mid-January that he will be retiring the first week of February allowing for a very short transition of knowledge to the newly assigned coding lead.	
Cost as of Apr 17, 2023	*Total Cost to Date (direct + indirect):*	18,018.63
	Est Cost at Completion (E$AC):	85,395.13
	Total Budget:	92,157.06
	Variance (Total Budget minus- E$AC):	6,761.93
	Reason for Variance:	Variance is due salary as a result of moving Stan Hasper's hours to

Projections as of Apr 17, 2023	*Dollars Projected for Month:*			2,050.26
	Actual Dollars Used:			1,380.20
	Variance (Projected minus Actual):			670.06
	Reason for Variance:	Not as much project management that was projected has been needed at this point. Due to initial project delay, coding hours have not been utilized.		

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	Mar, 2023 (HRS2022-Screening)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Batch 4 sample continues to be released on a flow basis. The endgame strategy was approved by the PIs. It is in the process of being submitted to the IRB. We anticipate being able to begin that in May. We will also be returning cases to the field for additional effort to either be completed or reach the eligibility for the endgame strategy.	
	Those who remain from the February training (about half) are doing well at screening. They have been meeting goals to-date. SSL staff continuing calling Batch 1-3 cases with phone numbers.	
	A larger training of ~110 is happening in April. SRO and sampling team have been working together on the sample design. We will subsample MOC strata as we are doing well with MOC recruitment. We are working to determine how much sample is needed and if we will need to release any of the reserve sample that needs addresses sorted and possibly some listing done.	
	We have had discussions with the PIs about how many baseline interviewers we need to have done by the end of calendar year 2023. The goal is to have 50% (or more) of the EGENX goal (4,500-5,200), and most/all of the MOC	

goal (2,000).

Special Issues

Cost as of Apr 14, 2023	*Total Cost to Date (direct + indirect):*	9,699,012.94
	Est Cost at Completion (E$AC):	28,949,756.65
	Total Budget:	28,919,242.00
	Variance (Total Budget minus- E$AC):	-30,514.65
	Reason for Variance:	Project staff is aware of the current projected overrun. Added projections for increased number of new hires for the April training (100 ->130), increased the number of days (6->8), and added additional time for DCS training group for the April training.
Projections as of Apr 14, 2023	*Dollars Projected for Month:*	946,531.46
	Actual Dollars Used:	732,734.54
	Variance (Projected minus Actual):	213,796.92
	Reason for Variance:	The largest contributors to the variance were spending less in recruitment advertising, unused respondent payments, overall hours (~1,000) and overestimating on hosting from the February training. Most of those costs were pushed forward.

Measures

	Units at Complete	**RR**	**HPI**
Current Goal:	3,600/1,500 HHs	73%	3.0
Goal at Completion:			
Current Actual:	1,223/1,223	26.5%	4.52
Estimate at Complete:			
Variance:			

Other Measures

Project Name	(IHDS3) India Human Development Survey Wave 3		
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 358,900.61	**Indirect Budget:** 200,983.92	**Total Budget:** 559,884.53
Principal	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	Mar, 2023 (IHDS3)	Implementing

Risk Level	Some Concerns
Monthly Updates	March was a busy month
	Prepared Production project for A06. Had to jump in to deal with testing data models that made it into production. We continue to push along releasing new languages and fixes to the Migrant data model and preload process as issues arise. System issues still remain a short list, we continue to get 2 or 3 items a week where lines don't spawn for some reason or another. Due to the value of lines that properly spawn, we attribute this user error.
Special Issues	

Cost as of Apr 17, 2023	*Total Cost to Date (direct + indirect):*	558,879.01
	Est Cost at Completion (E$AC):	577,356.99
	Total Budget:	559,884.53
	Variance (Total Budget minus- E$AC):	-17,472.46
	Reason for Variance:	Our overrun has increased by $1K, however the previous month we were underrun by about the same amount, so the net is about the same.
Projections as of Apr 17, 2023	*Dollars Projected for Month:*	10,475.29
	Actual Dollars Used:	11,871.27
	Variance (Projected minus Actual):	-1,395.98
	Reason for Variance:	unforeseen issues came up that needed extra attention. WE continue to monitor hours very carefully.

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

Project Name	**(MI CReSS (Year 3)) Michigan COVID-19 Recovery Surveillance Cohort Study**			
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2			
Project Type	Sponsored Projects			
Budget	**Direct Budget**: 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:** Sarah Elisa Broumand			
	Budget Analyst: William Lokers			
	Production Manager: Ruth B Philippou			
	Senior Project Advisor: Nicole G Kirgis			
	Production Manager 1:			
	Production Manager 2:			
Proposal #	no data			
Description	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	Mar, 2023 (MI CReSS (Year 3))	Implementing
Risk Level	On Track	
Monthly Updates	Sample replicate 14 was released as planned. Release 10 extended reminder calling for a few weeks due to a low response rate that we suspect was affected by technical issues with Arealink (discovered back in October that	

messages were not sent out). However we were able to finally reach an 80% response rate and finish Release 11 on time, first time in several months.

The project lost a few field staff that had to join PSID, so we then had to hire and train 2 additional staff.

One goal of the project was to achieve a 60/40% breakdown of Web versus CATI Iws. We currently have a 70/30% breakdown for releases 1 through 14 so far. For the next two releases, 15 and 16, we will be experimenting delaying Reminder Calling for about 3 weeks to hopefully improve HPI's and the Web/CATI Iws breakdown even further.

Special Issues		
Cost as of Apr 17, 2023	*Total Cost to Date (direct + indirect):*	252,398.84
	Est Cost at Completion (E$AC):	750,826.80
	Total Budget:	841,375.00
	Variance (Total Budget minus- E$AC):	90,548.20
	Reason for Variance:	New funding was just added and still need to work with financial analyst to balance out the hours.

Projections as of Apr 17, 2023	*Dollars Projected for Month:*	54,118.04
	Actual Dollars Used:	45,503.04
	Variance (Projected minus Actual):	8,615.00
	Reason for Variance:	New funding was just added and still need to work with financial analyst to balance out the hours.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	4,309 (Rel 1-14)	80% (60%-Web/40%Tel)	2.25
	Goal at Completion:		80% (60%-Web/40%Tel)	
	Current Actual:	3,336	78% (70%-Web/30% Tel	4.79
	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	Mar, 2023 (MTF Base Year 2022_27)	Implementing
Risk Level	On Track	
Monthly Updates	March 2023 - To date (4/7) the survey has been administered in 127 schools and 13,631 students have completed the survey - RR 85%. Interviewers visited 115 of these schools to proctor in person. Surveys in the remaining schools (n=12)	

were coordinated by the interviewer without visiting the school.
- The number of recruited schools passed to SRO interviewers to conduct the survey administration protocol is lower than in previous years (271 compared to 349 in 2022 - in 2019 the number of schools was closer to 400). Recruiters are finding it much more difficult to recruit and then complete all the administrative steps they need to before the school is passed to interviewers. Interviewers are being asked to make FTF visits (and other contact attempts) to help gather the details they need to. Both the callers and interviewers are also making FTF visits to schools in order to recruit the schools (the process that begins during the later summer in the previous year) - these are schools who have not responded to initial letters asking for their participation.

Special Issues	Illume has been the Computer Assisted Self-Interviewing (CASI) software used for production on MTF Panel since 2017 and Base Year since 2021.
	The company, DatStat, which own and support Illume recently became part of R1 RCM Inc. (Revenue Cycle Management Company). In late January, we learned that this new parent company would be ending product support for Illume. Apparently, the Illume software is no longer an important part of their portfolio.
	Following some negotiations, we have now received notification that SRC's official end date for support will be May 31st 2023. We also received a draft contract for a no cost perpetual license to use the software with no support (along with the source code). The license, and platform, would be provided "as is, with all faults" and would be unsupported. We are responsible for hosting our own instance of the Illume platform. The contract has been reviewed by Marcus Blough (CMT) and is currently being reviewed by UM procurement. We expect to be given the go ahead to sign the contract.
	As we are self-hosted and self-sufficient in supporting Illume Marcus Blough feels that it is safe to continue using the software until the end of this calendar year but that we should begin looking for a new platform for 2024 data collection.
	We are currently working on reviewing Blaise and Qualtrics capabilities against the functional requirements for MTF (base year and panel).

Cost as of Apr 07, 2023	Total Cost to Date (direct + indirect):	1,165,480.53
	Est Cost at Completion (E$AC):	8,185,440.73
	Total Budget:	9,778,060.00
	Variance (Total Budget minus- E$AC):	1,592,619.27

	Reason for Variance:	Current projections result in an underspend of $1,592,619.27 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. Also described below - the number of schools recruited that could potentially be passed to SRO is ~240 - much lower than previous year (~390). Pressure on schools are even greater, they are still dealing with staffing challenges but in addition pressure for parents to influence school activities is also more prevalent this year.
		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 Apr 07, 2023	Dollars Projected for Month:	234,782.66
	Actual Dollars Used:	234,782.66
	Variance (Projected minus Actual):	41,585.71
	Reason for Variance:	Variance - The majority of the variance is from salary costs (specifically IWER II hours). Hours per IW (school) have reduced over the past month. Projections used the actual rate from last month as an estimate.

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	Mar, 2023 (MTF Panel 2022-27)	Implementing
Risk Level	On Track	
Monthly Updates	1. Management - Working with MTF staff to prepare the 2023 data collection - Continues testing the survey in Illume 2. System - Completed setting up system for production - Putting final touches on the refinement of the RLM system. - Transitioning and training a new DM - Lab SMS testing application has been set up. - Continue to work on Web SMS for 2023 production - Provided updated email templates to MTF staff - Provided updated project timeline to MTF staff 3. Data Collection - N/A	

Special Issues

Cost as of Mar 31, 2023	Total Cost to Date (direct + indirect):		711,857.72
	Est Cost at Completion (E$AC):		3,861,853.95
	Total Budget:		3,895,217.00
	Variance (Total Budget minus- E$AC):		33,363.05
	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 Mar 31, 2023	Dollars Projected for Month:		20,027.23
	Actual Dollars Used:		18,428.23
	Variance (Projected minus Actual):		1,599.00
	Reason for Variance:	The total project amount includes MTF Web Illume as well as Non-Response Calling and Winter Location project. The overrun amount is MTF Panel 2022-2027 that was the combination of MTF Panel 2017-2022 and MTF Web Illume. Project team will revisit and streamline projections for future months.	

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

Other Measures

Project Name	(PR-PSID) Puerto Rico Panel Study of Income Dynamics		
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 828,581.00	**Indirect Budget:** 464,004.00	**Total Budget:** 1,292,585.00
Principal	Narayan Sastry (University of Michigan)		
Investigator/Clients	Elizabeth Fussel (Brown University)		
Funding Agency	NICHD, with supplemental funding being sought from NIA		
IRB	*HUM#:* HUM00197300		*Period of Approval:* 4/5/2022-3/22/24
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	Mar, 2023 (PR-PSID)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Listing: Close to finishing the listing process. Currently, there are two outstanding segments, which were inaccessible and required replacement. SRO coordinated with PR to clean preload list for the replacement segments, and SRO is working to create the new maps. PR has started shipping back laptops -- first batch was received. Hired two temps to help with testing the Spanish instrument. Temps will be trained and will initially test the Core instrument, until PR-PSID instrument is programmed. Contract with ETI still not in place. SRO provided PIs with list of Key Assumptions by phase. Contract finalized on April 10th. Contract with translation company (Atabex) finalized. Held meeting to kick off translation work in late March -- SRO delivered first batch of materials in early April.	

Main Blaise programming work to begin in late April at the earliest.

Targeting pretesting in late July/early August, instead of June.

Special Issues	Timeline concerns: ETI coordination, including hardware procurement, was delayed while we waited for the contract the be finalized. Translation work began later than expected. Still unsure of how quickly the translators will be able to turn around materials. Instrument development has not yet begun. SRO awaits the spec of PI content from the PIs and Core, Spanish instrument development is still ongoing.		
Cost as of Apr 18, 2023	*Total Cost to Date (direct + indirect):*		246,486.25
	Est Cost at Completion (E$AC):		1,289,061.25
	Total Budget:		1,292,585.00
	Variance (Total Budget minus- E$AC):		3,523.75
	Reason for Variance:	Trivial: currently projected at 0.3% of budget.	
Projections as of Apr 18, 2023	*Dollars Projected for Month:*		54,543.01
	Actual Dollars Used:		15,862.41
	Variance (Projected minus Actual):		38,680.60
	Reason for Variance:	This underrun was mainly due to underruns in tech categories such as app programmer sr, database analyst, & to SSI.	

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	Mar, 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 will start with sample recruitment in early May. A brief 4 hour training is scheduled for May 9th. Pretest training is scheduled for June 13 - 16 following PSID Core Training 2.
	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. However, we are still finalizing the

IVR contract working with the vendor and the U-M procurement. Phase 1 is scheduled for October - May 2024.

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
- B4.8 recruitment, Preload builder instrument is programmed and ready

SurveyTrak programming:
- Integration Pretest project is being tested
- ST + B5 project for younger children programmed and tested

MSMS Programming:
-- Awaiting pretest version of INT3
-- 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 procurement approval.

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

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

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

Other Measures

Project Name	(PSID23 Online Contact Update) Panel Study of Income Dynamics 2023 Online Contact Update		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 47,456.00	**Indirect Budget:** 0.00	**Total Budget:** 47,456.00
Principal 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	Mar, 2023 (PSID23 Online Contact Update)	Closing
Risk Level	On Track	
Monthly Updates	Project ended on December 15.	
Special Issues		
Cost as of Apr 13, 2023	*Total Cost to Date (direct + indirect):*	45,946.49
	Est Cost at Completion (E$AC):	46,920.26
	Total Budget:	47,456.00

				535.74
	Variance (Total Budget minus- E$AC):			535.74
	Reason for Variance:	Minimal change. No projections until project archiving in May.		
Projections as of Apr 13, 2023	*Dollars Projected for Month:*			182.17
	Actual Dollars Used:			205.11
	Variance (Projected minus Actual):			-22.94
	Reason for Variance:	Monthly overrun due to fringe rate fluctuation.		

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

Other Measures

Project Name	(PSID23) Panel Study of Income Dynamics Core 2023		
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 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:** 3/22/22-3/21/23
Project Team	**Project Lead:** Rachel Anne Orlowski		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager: Stacy Quisenberry		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Daric Thorne		
	Production Manager 2: Shonda R Kruger-Ndiaye		
Proposal #	no data		
Description	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 saliva collection effort has its own proposal number, budget, and MPR entry.		
	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 - 03/2024		
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 & Darnell Christian; Self Scheduler Programmer - Peter Sparks; Help Desk Support - Andrea Pierce; Production Tech Support - Sarah Elisa Broumand; Testing Coordinator - Camila Kendall; Project/Production Support - Mark Nathin, Janet McBride, & Xiomara Lorenzo-Guerra; Reporting, Mapping, & Sample Assignment - Ji Qi & Wen Chang
Other Project Name	PSID Core 2023
Sample Mgmt System	MSMS
Data Col Tool	Blaise 5
Hardware	Laptop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	Camtasia
Incentive	Yes, R; Yes, Other (Locator, Proxy)
Administration	ISR Group (PSID)
Payment Type	Check, post (Varies); Cash, post (Varies); Other (electronic, post--JP Morgan)
Payment Method	Check through other system (PSID will handle check & e-payment via RAPS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (PSID will handle check & e-payment via RAPS)

Report Period	Mar, 2023 (PSID23)			Implementing
Risk Level	Some Concerns			

Monthly Updates	Summary of March 2023 Activities
	Production: Launched English interview data collection on March 23 by inviting 50 web cases. Invited CATI cases and more web cases on 3/27. Additional web sample was invited on 3/29. Interviewer outbound effort began on 3/29 by calling CATI cases.
	Tech: The second Prod Data Test ran from 3/2 – 3/7. A showstopper was found on 3/9, and a new data model was posted to the integration project on 3/10 and signed off there. From 3/13 – 3/16, prepared the production project.
	Days before production launch, it was discovered that test SIDs in the production project matched real production SIDs. The MSMS Core development team determined a way to "remove" the test records from the production project, but this caused launch to be delayed by a few days.
	At the start of production, it was discovered that Blaise was not kicking out respondents who entered the wrong date of birth. The bug was immediately fixed and a new data model was posted. All other Blaise bugs did not need urgent fixes and will be implemented when the data model with Spanish is ready.
	Spanish CATI programming continued and Spanish web programming began. Efforts continued to streamline PQT for TL and management use. Report development continued. Continued work on Team Locating within the 68ID Site. Self scheduler and verification still awaiting sign off.
	IRB: Amendment with changes for 2023 wave approved on 3/10.
	Training: Trained eight field leaders and seven PSID21-experienced interviewers on 3/8 - 3/10 and 3/13 - 3/15 (Training 1A). Opened Training 1 (T1) home study on 3/15. Held T1 Train the Trainer on 3/17. Held Team Leader Training on 3/21 – 3/23. For T1, trained 30 interviewers from 3/27 – 3/30; T1 continued into April.
	Staffing: Started new hire recruitment. Experienced higher than anticipated levels of on-staffer attrition.
	Saliva: Development paused as interview launch preparations were underway. On 3/12, PIs agreed to SRO's recommendation that interview and saliva funds be set up as one a multi-funder project, after consultation with SRC Leadership. PIs signed off on revised rebudget bottom-line on 3/27.

Special Issues	Unable to staff as many on-staff interviewer hours as budgeted -- planning for many shared agreements. Need more new hires than anticipated, which has a sizable negative impact on the budget and proposes a risk to data collection.

Cost as of Apr 24, 2023	*Total Cost to Date (direct + indirect):*	973,220.83
	Est Cost at Completion (E$AC):	6,050,275.34
	Total Budget:	6,235,802.00
	Variance (Total Budget minus- E$AC):	185,526.66
	Reason for Variance:	Still need to combine the PSID23 main iw budget and saliva budget in CRS. Currently CRS only has the main iw budget loaded. Still in the process of projecting the total main iw and saliva costs in CRS. This report reflects projections as of 4/24/23. All calculations for this report are done outside of CRS in order to combine the main iw and saliva budgets and actuals to date. Note: Unable to separate Core IDC costs from Contact Update IDC costs. Cost values only reflect Direct Costs.

Projections as of Apr 24, 2023	*Dollars Projected for Month:*	394,851.41
	Actual Dollars Used:	265,109.52
	Variance (Projected minus Actual):	129,741.89
	Reason for Variance:	Production managers, data managers, training support, administrative assistants, and recruitment staff charged less time than projected. Interviewer effort was grossly over projected, as minimal training and no data collection costs hit in March. Not all postage and printing costs hit in March. Note: Unable to separate Core IDC costs from Contact Update IDC costs. Cost values only reflect Direct Costs.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:			
	Goal at Completion:			
	Current Actual:	162	6%	1.0
	Estimate at Complete:			
	Variance:			

Other Measures	Notes for Measures Above: Units and RR from 4/1/23 FPR; Units = 162 iws (8 CATI, 154 web). HPI through 4/1/23 from Dashboard.

Still need to develop a goal chart. March had less than two weeks of production.

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	Mar, 2023 (QoL & Hearing Loss)	Implementing
Risk Level	On Track	
Monthly Updates	On March 1, Lisa Van Havermaet and Margaret Hudson traveled to rural Michigan (near the Indiana border) to conduct cognitive interviews with parents of children in the Amish community. Michigan Medicine Audiology holds quarterly community clinics and the SRO cognitive interviewing team was part of the team onsite that day (U-M audiology and occupational therapy, county health department, community dental services. We were conducting cognitive interviews with parents of children aged 7-12. We were able to complete 3 cognitive interviews (out of an expected 11). Turn out at the clinic was low this quarter and many families cancelled their visits and/or did not show up for appointments. The clinic occurred just after an ice storm that prevented county outreach workers from traveling to homes to remind families of appointments/encourage attendance. We will make a few changes to our instrument and participate in the June clinic to gather more data, due to the small number of interviews we were able to complete.	
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

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:			

Other Measures

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	Mar, 2023 (SAME)	Implementing
Risk Level	On Track	
Monthly Updates	Project Management:	

- Continue to provide updates to the SRO Admin team.
- Made projection adjustments with the TSG supervisors
- Continue to coordinate with the technical team staff for programming and testing.
- Checked in with the PI team on pre-production progress including project timeline, proposed e-Research submission timeline and
  related documents.
- Continue to monitor costs with the financial analyst.
- Preparing kickoff meeting for April 7, 2023.

Technical System Development and Testing:
- Completed Form A images work
- Completed Blaise 4.8 Form A programming
- Completed initials SurveyTrak setup
- Blaise Standalone testing is in progress

Interviewer Hiring
- Staff recruitment is in progress.

Training
- Zoom tech training section is scheduled on 5/19/2023
- Plan to train from May 22 through May 31 (4 hours per day excluding Memorial Day holiday weekend 05/26-5/29)

Special Issues

Cost as of Mar 31, 2023	**Total Cost to Date (direct + indirect):**	36,043.28
	Est Cost at Completion (E$AC):	314,871.38
	Total Budget:	302,327.00
	Variance (Total Budget minus- E$AC):	-12,544.38
	Reason for Variance:	The overrun amount was due to several cost drivers that were not in the budget, such as more expensive of WJ Assessment Materials, more expensive tablets, increasing hours for app programmer intermediate, app programmer Seniors, and general programmer intermediate categories. These facts led to us to closely monitor the costs throughout the production period.
Projections as of Mar 31, 2023	**Dollars Projected for Month:**	29,254.16
	Actual Dollars Used:	17,699.74
	Variance (Projected minus Actual):	11,554.42
	Reason for Variance:	

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	Mar, 2023 (SCA 2023)	Initiation
Risk Level	On Track	
Monthly Updates	SCA March 2023 began as scheduled on Wednesday, FEB 22 and ended as scheduled on Monday, MAR 27. We completed 600 IWs (320 RDD/180 RECON/100 R12) meeting our monthly IW goals, at an HPI 2.93 (.07 lower than our 3.0 monthly target).	
Special Issues		
Cost as of Apr 17, 2023	**Total Cost to Date (direct + indirect):**	290,682.68
	Est Cost at Completion (E$AC):	1,236,496.16
	Total Budget:	1,332,352.00
	Variance (Total Budget minus- E$AC):	95,855.84
	Reason for Variance:	The variance is largely due to a reduction in projected Interviewer II and III hours offset only partially by the corresponding increase in Survey Tech I and II hours in addition to lower than budgeted

Programmer salaries, as well as lower than budgeted Survey Tech I and II salaries due in part to a lower than budgeted HPI. HPI is regularly lower than the budgeted 3.2 though this trend may not continue as attrition returns to pre-pandemic levels necessitating the staffing of more new hires (ST Is) whose salaries are lower than are those of veteran ST IIs.

Projections as of Apr 17, 2023	Dollars Projected for Month:			101,266.52
	Actual Dollars Used:			94,106.62
	Variance (Projected minus Actual):			7,159.90
	Reason for Variance:	The variance is largely due to the reduction in projected Interviewer II and III hours offset only partially by the corresponding increase in Survey Tech I and II hours.		

Measures		Units at Complete	RR	HPI
	Current Goal:	600		3.0
	Goal at Completion:	600		3.0
	Current Actual:	600		2.93
	Estimate at Complete:	600		2.93
	Variance:	0		-.07

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	Mar, 2023 (SRS 2021)	Implementing
Risk Level	Attention!	
Monthly Updates	During March 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 • Procurement o Conducted procurement for study supplies for both D-Amp and SRS. Supplies were purchased for kitting and shipped to the kitting vendor. o Supplies for interviewer duffle bags were procured and shipped to Ann Arbor. • Technical systems & Questionnaires	

o Developed specifications for the education and employment sections of the questionnaire – presented to the research team. Worked to finalize specifications for the main questionnaire, clarify skip patterns.
o Finalized updates to the informant questionnaire and observations programming specifications.
o Began updates to the Arabic informant questionnaire, QxQs and respondent booklet.
o Finalized initial Blaise specifications for programmers. Updated the respondent booklets and QxQ programming specifications.
o Conducted rounds of testing on the screener application.
• Training preparation
o Reviewed and revised study-specific training agenda.
o Began drafting project management chapters.

Task 2: Sampling
• Reviewing potential dashboard designs.
• Began preparation of the D-Amp and SRS sample.

Task 3: Questionnaire Development
• See Task 1 for activities completed by the management team

Task 4: CAI Programming
• Programmed combined screener, fixed bugs.
• Programmed initial changes to informant interview.
• Began programming the Main survey, physical measures & biomarkers, and cognition sections.

Task 5: Systems Programming
• Finalized updates to the 2020 D-Amp sample management systems to update to the most current version of SurveyTrak.
• Began programming updates to the SurveyTrak screener project to allow it to create sample lines for both D-Amp and SRS.
• Began programming changes to SurveyTrak Main D-Amp project.

Tasks 6, 7: Interviewer Recruitment & Hiring, Training
• Facilities
o Contacted sites to obtain bids for July training space. Re-issued RFP
• Interviewer recruitment
o Processed hiring paperwork for Team Leaders and Production Coordinator
o Updated flyers for new hire postings
o Conducted outreach to local organizations to post flyers
o Evaluated applications, conducted 1st and second interviews for candidates
o Assessed and certified bilingual interviewers

Task 8: Main Data Collection
• See Task 1 for procurement activities

Task 9: Post Collection Processing
• No activity this month

Task 10: Weighting
• No activity this month

Task 11: Final Data Deliverables
• No activity this month

Special Issues	Areas Needing Special Attention

Schedule
o The project is well-behind schedule for programming, testing and other study preparation tasks due to low staffing at the study start up, which delayed completion of specifications and other items.
Documentation for training (such as a project manual) will likely not be ready for training. Instruments were not received for testing until 4/20/2023.

Programming is running behind schedule due to the complexity of the specification changes, issues with SurveyTrak complexity, and issues with capacity.
? 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. These items are necessary for training.
? 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.

• Financial:
o Although not reflected in March financials, hours charged in April indicate that Blaise programming will be over budget 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.
o Although not reflected in March financials, hours charged in April indicate that SurveyTrak programming will likely be over budget due to the unexpected complexity of the screener project programming, which generates sample lines for two studies. It was also more difficult that expected to resurrect programming from 2019/2020 and update to the most current version of SurveyTrak.
o SRO is carefully monitoring programming progress and cost. At this time, some line items currently have slack (such as project management & supplies) that will be able to absorb modest overruns on other line items.

Cost as of Apr 17, 2023	*Total Cost to Date (direct + indirect):*	163,081.59
	Est Cost at Completion (E$AC):	5,873,145.04
	Total Budget:	5,876,610.11
	Variance (Total Budget minus- E$AC):	3,465.07

	Reason for Variance:	The variance is insignificant.	
Projections as of Apr 17, 2023	*Dollars Projected for Month:*		85,775.29
	Actual Dollars Used:		65,648.00
	Variance (Projected minus Actual):		20,127.29
	Reason for Variance:	The majority of the underrun is in labor. Staff have not been charging budgeted hours due to work on other projects, and a majority of the labor is being completed by exempt staff working over 40 hours. Recruitment advertising charges have not yet hit the project financials.	

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

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

Project Name	(STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study		
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 8,196,521.00	**Indirect Budget:** 4,590,892.00	**Total Budget:** 12,809,390.00
Principal	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, Andrew Piskorowski, Rose Zdybel, Ji Qi, Paul Burton, Makenna Harrison, Lamont Manley, Lisa Van Havermaet, Stephanie Windisch, Youhong Liu, Peter Sparks. Pam Swanson, Jim Rodgers, Marcus Blough, Nick Hinkle-DeGroot, Pete Westhead

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

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

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

Monthly Updates

Project Management and Planning:
? SRO leadership attended the first quarterly GSC meeting on March 30.
? 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 communicated to USUHS our preference to have the ~$80k biosample flags budget combined with the Year 4 funds (as opposed to having a separate agreement).
? IRB:
o We submitted the Continuing Review for the STARRS-LS Waves 3 and 4 protocol on March 9. The U-M IRB approved it and we sent it to USUHS for secondary review on April 6.
o We started work on the amendment for the biosample flag/administrative data/inventory document public release.
? STARRS-affiliated, but not STARRS funded, work:
o VA/HEARTH project:
? We awaited the sub-award from Harvard. We talked with Harvard about starting our work, in particular the IRB, sooner than anticipated (U-M SRO involvement was specified as starting June 2023 in the proposal).
? We established that Margaret Hudson will be the manager for the HEARTH project. She is available to start working on the project as early as mid-April.

Enclave and User Support:
? Annual Security Controls Review: Additional vulnerability scans were sent to AAG per their request. We are currently awaiting the 2022 approval letter.
? Annual Security Training Renewal 2023: The last two renewals were completed in March. The 2023 renewal process is complete.
? The annual update to the SSN-LinkageID list was transferred to AAG on March 15.
? An analyst found an instance of a death reported in the 2020 NDI file that had administrative data after the date of death. The U-M team investigated and determined the case should not have been reported as a death although it was indicated as a "true death" in the NDI matching files. We began reviewing our process to see if there are others like this and will be making corrections to remove such cases from the NDI deliverable files.
? 2023 repeat NDI search: Dr. Ursano received access to the CDC NDI electronic application form and Meredith transferred the STARRS-LS NDI application to the electronic system. She encountered a technical bug in the form and reached out to their help desk for assistance. They said entering the information on behalf of Dr. Ursano was not permitted and they suspended his account. Dr. Ursano's assistant, Aaron Weingrad, became involved to request the account be reinstated. However, the CDC NDI office will only entertain direct communications from the PI and only the PI himself can enter information into the online form. Aaron continued work on this through the end of the month. Meredith provided background information on the process as requested/needed.
? 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 The Enclave team QCed and processed an additional high priority administrative construct files from Harvard (via AAG) and posted these to the Enclave on March 17.
o A complex R object (ranger model) was successfully reviewed and moved off the Enclave on March 20.
o R packages, mediation and bnlearn, were installed on the UM-STARRS Data Enclave (Linux and Windows).
o One user was onboarded to the Enclave after a delay in the fingerprinting/ background check process was resolved.
o Work on additional requests related to the blood sample counts [by survey data collection (i.e. AAS, NSS, PPDS, SHOS-A, LS1, LS2) for the Army STARRS participants, the STARRS-LS cohort and respondents with data at ICPSR] for Dr. Ursano was on hold due to other deadlines.
? There were no biomarker group requests needing assistance in March.

Wave 3 Data Deliverable
? STARRS-LSW3 final survey data was loaded to the Enclave on March 8.
? Updates to the NO_ADMIN_LINK and YES_ADMIN_LINK tables were loaded to the Enclave on March 8.
? Work began on producing the User Guide and Crosswalk for public use deliverables.
? Work began on the Paradata and Consent deliverables to the Enclave.

Public Use Data:
? Biosample flags, administrative variables, and inventory document:
o We awaited funding for this work (~$80k budget will be combined with the Year 4 funds).
o IRB amendment language was drafted.
? 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 April 7, 2023, are as follows:
o Replicates released: 5 of 14 released with 5,134 sample lines.
o Completed interviews: 3,046 (2,867 web; 179 phone).
o Replicate 3 ended production on March 27 with a final response rate of 76.3%, which is 2.7 percentage points higher than Replicate 2 and 6.2 higher than Replicate 1. This raised the overall response rate for completed replicates to 73.9% (from 72.0%).
o Replicate 4 continued in Phase 3 through April 7. The response rate is currently 58.3% and currently trending slightly below (~1.5 pp) the trajectory of the Replicate 3 response rate.
o Replicate 5 was released on March 27. By April 7, it was in Phase 2 and respondents were receiving emails. The Rep 5 response rate is currently 24.3% and tracking with the average rate.
o The response rate for completed replicates (Reps 1-3) is 73.9%.

Safety Plan Results:

? The first quarterly safety plan tables for Wave 4 were sent to USUHS for the GSC on March 14.
? The Wave 4 Safety Plan rate is 11.3% as of April 7

Special Issues	Our areas of risk and mitigation strategies continue to be the same as reflected in previous months. Description of the following area was slightly updated this month: ? Throughout Wave 3, we received more anecdotal reports of respondents saying the token of appreciation isn't enough to make participation in the survey worth their while. Some are individuals who received $100 last time, and are still in phases offering $50. For others, the dollars are not enough for the time involved. We are mindful that Wave 4 response rates may be negatively affected by respondents' experience with the longer Wave 3 survey. The first two replicates in Wave 4 produced lower response rates. Replicate 3 yielded a higher response rate than Replicates 1 and 2, and Replicate 4 has followed the Replicate 3 trajectory to date. If the response rates for the next replicates of Wave 4 yield lower than expected response rates, we may propose considering whether to implement an incentive experiment of, most likely, $75 and $150 dollars for approximately three replicates. We will want to explore whether an incentive increase is merited (especially if there are further waves of data collection).

Cost as of Feb 28, 2023	*Total Cost to Date (direct + indirect):*	7,136,548.51
	Est Cost at Completion (E$AC):	12,855,903.42
	Total Budget:	12,809,390.00
	Variance (Total Budget minus- E$AC):	-46,513.42
	Reason for Variance:	We spent a total of $269,148 in February. Our projected deficit for the total five-year project is about the same at $46,513 (compared to $44,688 in January). We will continue to review project expenses and update our projections based on realized costs and our experiences to date.
Projections as of Feb 28, 2023	*Dollars Projected for Month:*	297,228.45
	Actual Dollars Used:	269,147.67
	Variance (Projected minus Actual):	28,080.78
	Reason for Variance:	We underspent in a few task areas in February, primarily in Main Data Collection - fewer interviewer hours were charged than projected (also around $3K direct less in RPay than projected). The current Wave 4 MDC projections assume an instrument length similar to that of Wave 3. So far, the Wave 4 survey is running about 7-8 minutes shorter than Wave 3, so our projections are conservative, at least in terms of CATI administration times, so we are typically underrunning interviewer projections. After completing two or three Wave 4 replicates, we will have updated production statistics that can be used to update the Wave 4 projected hours/costs. These updates will be made in the next month.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	10,800	75	10.2
	Goal at Completion:	10,800	75	10.2
	Current Actual:	1,561	73.9 (Reps 1-3)	11
	Estimate at Complete:	10,640	74	11
	Variance:			

Other Measures

Developmental/Initiative Projects Dashboard

NonArchived Development Initiative and No-DataCol Projects

Project	Type	Phase	Project Lead	Jan	Feb	Mar
TSME SRO SYS MAINTENANCE-GENERAL(483910)	Initiatives	Implementing	Jeffrey L Smith	🟢	🟢	🟢
TSME23 DCO Tech System Support FY2023	Initiatives	Initiation	Vivienne Y Outlaw	🟡	🟡	🟡
TSME23-PIPPA	Initiatives	Implementing	Mark Simonson	🟢	🟢	🟢
TSME23-QC-Systems (483249)	Initiatives	Implementing	Sarah Elisa Broumand	🟢	🟢	🟢
TSME23-SelfSchedUI (483424)	Initiatives	Implementing	Andrew L Hupp	🟢	🟢	🟢

Project Name	**(TSME SRO SYS MAINTENANCE-GENERAL(483910)) TSME SRO SYS 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	Mar, 2023 (TSME SRO SYS MAINTENANCE-GENERAL(483910))	Implementing
Risk Level	On Track	
Monthly Updates	Survey Trak Build team meetings New Builds changes released to field Monthly setup of SCA in the SurveyTrak environment STTM released to Prod	

Special Issues		
Cost as of Mar 31, 2023	*Total Cost to Date (direct + indirect):*	30,451.35
	Est Cost at Completion (E$AC):	35,446.36

	Total Budget:			20,000.00
	Variance (Total Budget minus- E$AC):			-15,446.36
	Reason for Variance:	See monthly updates		
Projections as of Mar 31, 2023	Dollars Projected for Month:			2,243.15
	Actual Dollars Used:			3,012.17
	Variance (Projected minus Actual):			-769.02
	Reason for Variance:	See monthly updates		

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

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

Milestones	*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	Mar, 2023 (TSME23 DCO Tech System Support FY2023)	Initiation
Risk Level	Some Concerns	

Monthly Updates	1. Enhance batch update page by adding Start-Date field. 2. Separate Closed assignment and Open assignment records to 2 tabs for Batch Update 3. Add Training date for query on Batch Update list 4. Reorganize column display of the Batch Update page 5. Test all the DCO systems (Fred, Recruitment Websites, DCSR, etc) for the SQL Server (SRODbPrd02) upgrade in the test environment with DBA 6. Add Role Change Special function (to make it consistent with the management team assignment constraint) 7. Attended the vendor presentations for the Applicant Tracking System for DCO

Special Issues		
Cost as of Apr 17, 2023	*Total Cost to Date (direct + indirect):*	50,916.15
	Est Cost at Completion (E$AC):	57,513.02
	Total Budget:	35,000.00
	Variance (Total Budget minus- E$AC):	-22,513.02
	Reason for Variance: funding did not cover support needed	
Projections as of Apr 17, 2023	*Dollars Projected for Month:*	0.00

	Actual Dollars Used:			4,203.87
	Variance (Projected minus Actual):			-4,203.87
	Reason for Variance:	x		

Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures	funding insufficient to cover support needed			

Project Name	**(TSME23-PIPPA) PIPPA 2.0 (425198) FY23**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 10,000.00	**Indirect Budget:** 0.00	**Total Budget:** 10,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Mark Simonson		
	Budget Analyst:		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	PIPPA application on the ODS Server		
SRO Project Period	01/1996 - 01/1996		
Data Col Period			
Security Plan	NA		

Milestones	*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	Mar, 2023 (TSME23-PIPPA)		Implementing
Risk Level	On Track		
Monthly Updates	Finished programming and validating HRS ranking/scoring computations against the specification document. Compared interviewer summary and weekly metrics to existing Web Log PIPPA computations to confirm computation differences and verify that new computations meet current specifications. Renamed ranking/scoring columns to better reflect the meaning of such variables.		
Special Issues			
Cost as of Apr 17, 2023	*Total Cost to Date (direct + indirect):*		15,663.15
	Est Cost at Completion (E$AC):		16,309.01
	Total Budget:		10,000.00
	Variance (Total Budget minus- E$AC):		-6,309.01
	Reason for Variance:	Additional feature specification	
Projections as of Apr 17, 2023	*Dollars Projected for Month:*		356.47
	Actual Dollars Used:		1,024.81
	Variance (Projected minus Actual):		-668.34
	Reason for Variance:	Additional feature specification	

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-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	Mar, 2023 (TSME23-QC-Systems	Implementing
Risk Level	On Track	
Monthly Updates	Overall, OLIVE remains actively used and has remained stable for a few years now. The month of March was mostly used just to attend meetings and troubleshooting minor issues. NO major development in progress for the remainder of the fiscal year.	

Special Issues			
Cost as of Apr 17, 2023	*Total Cost to Date (direct + indirect):*		25,358.22
	Est Cost at Completion (E$AC):		29,780.73
	Total Budget:		30,000.00
	Variance (Total Budget minus- E$AC):		219.27
	Reason for Variance:	Small variance.	
Projections as of Apr 17, 2023	*Dollars Projected for Month:*		1,474.17
	Actual Dollars Used:		1,307.62
	Variance (Projected minus Actual):		166.55
	Reason for Variance:	Small 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:			

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	Mar, 2023 (TSME23-SelfSchedUI (483424))	Implementing
Risk Level	On Track	
Monthly Updates	Time spent during this period was primarily related to the API work, and a few items that came up when promoting to production for PSID. The team did a project review to give SRO Admin an update. The few remaining projections are to potentially add some additional ways to specify the open and close variables 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.	
Special Issues		
Cost as of Apr 11, 2023	*Total Cost to Date (direct + indirect):*	13,953.18
	Est Cost at Completion (E$AC):	14,659.08

	Total Budget:			10,000.00
	Variance (Total Budget minus- E$AC):			-4,659.08
	Reason for Variance:	Additional work on the API programming. I've spoken with Gregg about overrunning the budget and it was okayed.		
Projections as of Apr 11, 2023	Dollars Projected for Month:			4,173.81
	Actual Dollars Used:			3,994.53
	Variance (Projected minus Actual):			179.28
	Reason for Variance:	Underrun is mainly due to fringe rate fluctuation.		

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

Other Measures