
Survey Research Operations

Monthly Project Report

Sponsored Data Collection Projects and Development Initiative

May 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
(HART) Health, Aging, and Retirement in Thailand (HART) - SRO consultation (2023)
(HCAP 2022) Healthy Cognitive Aging Project, 2022
(Health and Well Being in SE MI) Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan)
(HRS 2022 Panel & Baselines) Health and Retirement Study 2022 Main Interviews
(HRS 2024) Health and Retirement Study 2024
(HRS HOC) Health and Retirement Study – Historical Occupation Coding
(HRS2022-Screening) HRS 2022 - Screening
(IHDS3) India Human Development Survey Wave 3
(LHMS 2023 Spring) Life History Mail Study Spring 2023
(MI CReSS (Year 3)) Michigan COVID-19 Recovery Surveillance Cohort Study
(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027
(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027
(PR-PSID) Puerto Rico Panel Study of Income Dynamics
(PSID CDS 2023) PSID Childhood Development Supplement 2023
(PSID23) Panel Study of Income Dynamics Core 2023
(PSID23 Online Contact Update) Panel Study of Income Dynamics 2023 Online Contact Update
(QoL & Hearing Loss) Quality-of-Life for Amish Children with Hearing Loss
(SAME) Skills Assessments Mode Evaluation Study
(SCA 2023) Surveys of Consumer Attitudes
(SRS 2021) Social Relations 2023
(STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study
(TSME 23-Web Portal Documentation/Updates (423463)) TSME 23-Web Portal Documentation/Updates (423463)
(TSME SRO SYS MAINTENANCE-GENERAL(483910)) TSME SRO SYS MAINTENANCE-GENERAL(483910)
(TSME23 DCO Tech System Support FY2023) TSME23-DCO Tech System Support (483248) 2023
(TSME23 SRO Web Admin Migration (483257)) TSME23 SRO Web Admin Server Migration (483257)
(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	Apr	May
<i>AFHS</i>	Sponsored	Closing	Rebecca Gatward	🟢	🟢	🟢	🟢	🟢
<i>AFHS-Additional work</i>	Sponsored	Implementing	Rebecca Gatward	🟢	🟢	🟢	🟢	🟢
<i>BFY</i>	Sponsored	Implementing	Piotr Dworak	🟢	🟢	🟢	🟢	🟢
<i>BHM Library Project</i>	Sponsored	Planning	Karin Schneider	🟢	🟢	🟡	🟡	🟡
<i>CARE Military</i>	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢	🟢
<i>CARE SALTOS MTEC</i>	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢	🟢
<i>CRUSE - AHDFS</i>	Sponsored	Closing	Piotr Dworak	🟢	🟡	🟢	🟢	🟢
<i>DCUS</i>	Sponsored	Planning	Gary Hein	🟡	🟢	🟢	🟢	🟢
<i>ECHO (Year 7)</i>	Sponsored	Implementing	Shonda R Kruger-Ndiaye	🟢	🟢	🟢	🟢	🟢
<i>EDC-Endline</i>	Sponsored	Implementing	Karin Schneider	🟢	🟢	🟢	🟢	🟢
<i>HART</i>	Sponsored	Implementing	Nicole G Kirgis	🟡	🟡	🟡	🟡	🟢
<i>HCAP 2022</i>	Sponsored	Implementing	Maureen Joan O'Brien	🟡	🟡	🟡	🟡	🟢
<i>Health and Well Being in SE MI</i>	Sponsored	Implementing	Barbara Lohr Ward	🔴	🔴	🔴	🔴	🟡
<i>HRS 2022 Panel & Baselines</i>	Sponsored	Implementing	Evanthia Leissou	🟡	🟡	🟡	🟡	🟡
<i>HRS 2024</i>	Sponsored	Initiation	Evanthia Leissou	🟡	🟡	🟡	🟡	🟢
<i>HRS HOC</i>	Sponsored	Planning	Gloria J Baker	🟢	🟢	🟢	🟢	🟢
<i>HRS2022-Screening</i>	Sponsored	Implementing	Evanthia Leissou	🟡	🟡	🟡	🟡	🟡
<i>IHDS3</i>	Sponsored	Implementing	Sarah Elisa Broumand	🟡	🟡	🟡	🟡	🟡
<i>LHMS 2023 Spring</i>	Sponsored	Initiation	Gary Hein	🟡	🟡	🟡	🟡	🟢
<i>MI CReSS (Year 3)</i>	Sponsored	Implementing	Timothy Prand	🟢	🟢	🟢	🟢	🟢
<i>MTF Base Year 2022_27</i>	Sponsored	Implementing	Rebecca Gatward	🟢	🟢	🟢	🟡	🟢
<i>MTF Panel 2022-27</i>	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢	🟢
<i>PR-PSID</i>	Sponsored	Implementing	Shonda R Kruger-Ndiaye	🟡	🟡	🟡	🟡	🟡
<i>PSID CDS 2023</i>	Sponsored	Initiation	Piotr Dworak	🟡	🟢	🟢	🟢	🟢
<i>PSID23</i>	Sponsored	Implementing	Rachel Anne Orlowski	🟡	🟡	🟡	🟡	🟡
<i>PSID23 Online Contact Update</i>	Sponsored	Closing	Camila Kendall	🟢	🟢	🟢	🟢	🟢
<i>QoL & Hearing Loss</i>	Sponsored	Implementing	Margaret Lee Hudson	🟢	🟢	🟢	🟢	🟢
<i>SAME</i>	Sponsored	Implementing	Hongyu Johnson	🟡	🟢	🟢	🟡	🟡
<i>SCA 2023</i>	Sponsored	Initiation	Theresa Camelo	🟢	🟢	🟢	🟢	🟢
<i>SRS 2021</i>	Sponsored	Implementing	Barbara Lohr Ward	🔴	🔴	🔴	🔴	🟡
<i>STARRS-LS Waves 3 & 4</i>	Sponsored	Implementing	Meredith A House	🟢	🟢	🟢	🟢	🟢

Project Name	(AFHS) American Family Health Study		
Project Mode	Primary: Web	Secondary: Mail	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 1,596,238.00	Indirect Budget: 893,895.00	Total Budget: 2,490,133.00
Principal	Brady West (Survey Research Center)		
Investigator/Clients	William Axinn, Mick Couper and James Wagner (Survey Research Center)		
Funding Agency	National Institutes of Health (NIH)		
IRB	HUM#: 00167171	Period of Approval:	
Project Team	Project Lead: Rebecca Gatward		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lloyd Fate Hemingway		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>The American Family Health Study is a methodological project which aims to evaluate the feasibility of collecting national family, fertility and reproductive health data on a nationally-representative sample using a self-administered mode that is comparable to data collected with an in-person (interviewer-administered) study.</p> <p>We plan to screen around 42,120 randomly selected U.S. households by mail and web to identify an eligible population (aged 18-49 years). The screening work will be divided across two successive nine month periods (n=21,060 per effort). Each 'replicate' is a fully representative sample of U.S. households. Eligible respondents will be invited to complete three modules of content (administered separately or one instrument), either online or a paper questionnaire. The plan is obtain at least one returned module from 4,000 respondents.</p> <p>There will be a two month gap between replicates. The first replicate will begin in September 2019 and the second in around July 2020.</p> <p>The sample (addresses) will be selected via Market Systems Group (MSG). The following response assumptions have been made: at the screening stage, we estimate a response rate of 50% (around 21,000). Of these we expect approximately 12,000 addresses to contain an eligible person. In households with more than one eligible person we will randomly select one person.</p> <p>The contact protocol for the screener and main data collection is designed to, initially, push completion by web. Addresses or selected participants will only be mailed a paper screener or questionnaire after reminders encouraging completion online. This is a recent change to the protocol and was made after the SRO budget proposal was provided to the PI.</p> <p>The main interview consists of three modules which will replicate almost all NSFG content. The PI group is leading the process of reviewing and translating the content to web format and will provide specifications for programming to SRO.</p> <p>The following revisions have been made to the study design as detailed in the latest budget proposal (SRO scope of work);</p> <ul style="list-style-type: none">o We will use an external vendor to scan returned paper screeners, rather than manual data entry. This vendor will also format the paper forms, print materials and be responsible for most of the respondent mailings.o The original study design did not include web as a mode of data collection for screening. Additional funding from SRC has been obtained by the Principal Investigator to cover the development of a web screener and associated data management and reporting costs.o Telephone reminder calls remains one of the steps in the non-response protocol for the main data collection. However, it is likely that this effort will be targeted to a subset of the selected sample, rather than across the entire sample.o The amount budgeted for the TOA for the screener was \$2 and \$5 – 50% of the sample to receive each amount. The TOA amount will now be \$2 for the full sample. We may provide an additional TOA of \$5 to a subset of the non-responders as part of one of the follow-up reminder mailings (depending on available budget).o The eligibility age range for the study has been changed from 15-49 to 18-49. This eliminates the need to contact to parents/guardians of all eligible respondents who have not reached the age of majority to gain consent to participate in the study. There are three states where the age of majority is above 18 years of age – in these states we will adjust the selection protocol as necessary.o A further change to the study protocol is around completion of the main modules. In some circumstances we will provide Respondents the option to move directly to complete the main modules after completing the screener without being sent an invite in the mail/email to do so. This will only happen if the selected R is also the person who completed the screener.o An experiment around completion of the modules has been introduced to the protocol. Twenty per cent of the selected eligible respondents will be invited to complete the full 60 minute survey as one instrument, rather than completing three separate modules.		
SRO Project Period	01/2019 - 03/2022		
Data Col Period	05/2020 - 04/2022		
Security Plan	NA		

Milestones	<div>Pre Production Start: 09/01/2018</div> <div>Pretest End:</div> <div>Staffing Complete:</div> <div>SS Train Start:</div> <div>DC Start: 04/21/2020</div>		<div>Pretest Start:</div> <div>Recruitment Start:</div> <div>GIT Start:</div> <div>SS Train End:</div> <div>DC End: 04/30/2022</div>	
Other Project Team Members	SRO Team: Andrew Hupp, Laura Yoder, Rose Zdybel, Lloyd F Hemingway, Jim Rodgers, Colette Keyser, Deb Wilson, Wen Chang			
Other Project Name	During the budget proposal stage this project was known as 'A More Efficient Web-Based Approach to Collecting National Family, Fertility and Reproductive Health Data'.			
Sample Mgmt System	MSMS			
Data Col Tool	Blaise 5			
Hardware	Desktop			
DE Software	Other (Blaise 5 (for Mail questionnaires)); External vendor (TBD)			
QC Recording Tool	N/A			
Incentive	Yes, R			
Administration	SRO Group			
Payment Type	Check, post (Modules 1 - \$20, Module 2 - \$20 and Module 3 - \$30); Cash, prepaid (Screener IW - \$2 Potentially \$5 for a subset during NR follow-up)			
Payment Method	Check through STrak RPay System; Check through other system (Info. from MSMS and transfer information via Excel spreadsheet); Imprest Cash Fund from ISR Business Office (Info. from MSMS and transfer information via Excel spreadsheet)			
Report Period	May, 2023 (AFHS)		Closing	
Risk Level	On Track			
Monthly Updates	<div>May update</div> <div>Since last month the overspend on the main AFHS project decreased due to a refund for voided cheques. There are two further uncashed cheques that could be credited to this project.</div> <div>Current SRO focus: Any hours spent on AFHS tasks (projected just for Me, Colette and Dean) are being charged to the AFHS Feasibility budget. These are reported on separately in MPR (AFHS -Panel Feasibility).</div>			
Special Issues	The additional scope (panel feasibility and non-response follow-up) will be funded using sequestered funds (on a separate short code). The PI group have also agreed to fund the overspend on the main AFHS budget.			
Cost as of Jun 15, 2023	Total Cost to Date (direct + indirect):		2,507,953.12	
	Est Cost at Completion (E\$AC):		2,507,953.12	
	Total Budget:		2,490,133.00	
	Variance (Total Budget minus- E\$AC):		-17,820.12	
	Reason for Variance:		May 2023 update - Since last month the overspend on the main AFHS project decreased from \$11,704 to \$11,494.21. This was due to a refund of \$210 for uncashed cheques. The overall spend across both projects funded by the sequestering funds has decreased, by \$630, to \$74,288.	
Projections as of Jun 15, 2023	Dollars Projected for Month:		0.00	
	Actual Dollars Used:		-109.20	
	Variance (Projected minus Actual):		109.20	
	Reason for Variance:		Any additional spend will be charged to the short code for the 'AFHS additional work' - the overspend from the main AFHS and the additional work are being funded by sequestering funds. The amount credited was for an uncashed cheque.	
Measures		Units at Complete	RR	HPI
	Current Goal:	2000 (main IWs)	33.3%	NA
	Goal at Completion:	4000	33.3%	NA
	Current Actual:	2369	64%	NA
	Estimate at Complete:	2369	64%	NA
	Variance:	1631	+21% (see below)	NA
Other Measures				

Project Name	(AFHS-Additional work) American Family Health Study - additional work		
Project Mode	Primary: Web	Secondary: Mail	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 50,265.00	Indirect Budget: 0.00	Total Budget: 50,265.00
Principal Investigator/Clients	Brady West (SRC)		
Funding Agency	Internal UM sequestering funds		
IRB	HUM#: HUM00167171	Period of Approval:	
Project Team	Project Lead: Rebecca Gatward		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lloyd Fate Hemingway		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		

Description	<p>The American Family Health Study is a methodological project which aims to evaluate the feasibility of collecting national family, fertility and reproductive health data on a nationally-representative sample using a self-administered mode that is comparable to data collected with an in-person (interviewer-administered) study. The research design for the AFHS has seven clear steps. The additional work covered by this funding is to conduct step 7 (below):</p> <p>Step 1: finalize the design of the national web-based survey, using as much National Survey of Family Growth (NSFG) content as possible.</p> <p>Step 2: field the national web-based sequential mixed-mode survey over a two-year period, with the goal of collecting 4,000 completed surveys from a nationally representative sample.</p> <p>Step 3: conduct statistical analyses providing full-sample comparisons of estimates between our survey and the corresponding public-use data files for the NSFG from a similar time period.</p> <p>Step 4: conduct statistical analyses comparing estimates within key socio-demographic subgroups of the population – gender, race, and age groups.</p> <p>Step 5: examine changes in the gap in estimates (between the NSFG and our national web survey) across phases of the sequential mixed-mode design protocol.</p> <p>Step 6: compare costs, response indicators, and measures of effort across socio-demographic subgroups for different data collection modes and modules of the web-based survey.</p> <p>Step 7: further methodological research involving AFHS participants and non-respondents to inform the design of a larger-scale AFHS (research proposal).</p> <p>*****AFHS Panel Feasibility Survey*****</p> <p>The first component of this step involves AFHS respondents from the second sample replicate (n=1370). These respondents will be invited to participate in a brief follow-up survey that aims to collect responses to a small number of additional questions (12) related to health, relationships, and finances, as well as gauge the interest of the respondent in becoming a panel member. These results will primarily be used to inform the design of a larger-scale AFHS study (research proposal); additional substantive analyses of the questions will also be conducted.</p> <p>All AFHS participants from the second sample replicate (n=1370) will be invited to participate in the panel feasibility follow-up survey. The initial invitation to participants will be by letter, which will be mailed along with a \$2 token of appreciation. We will use addresses sampled for sample replicate 2 from the GENESYS system of Marketing Systems Group (MSG) - unless we received an updated address from the participant. We will also send the invitation by email for those participants who have provided a valid email address (84%).</p> <p>Non-response contact protocol:</p> <p>7 days after the initial invitation is mailed, participants will be contacted again by email (if available).</p> <p>14 days - we will send a further reminder by email or text message.</p> <p>21 days - email sent.</p> <p>28 days - paper copy of the survey along with a \$5 cash token to remaining non-responding participants.</p> <p>42 days - depending on the response rate we will telephone the participant to invite them to complete the follow-up survey.</p> <p>Participants will be mailed a \$10 check after completing the survey.</p> <p>This additional survey has been added to the existing AFHS MSMS project as an additional task. The existing task rules have been updated to include this data collection task but the non-response contact protocol will not be driven by task rules. We will manually change the status of the mail, text, email tasks as needed for relevant cases.</p> <p>Status:</p> <ul style="list-style-type: none"> • Currently testing the full process from opening the survey link to data being updated in MSMS. • IRB amendment has been submitted and we have responded to requested changes following the first review. • Sample address file has been provided to DataForce who will print the paper surveys, mail the initial invites, scan any returned paper surveys, deliver data to SRO and mail the final reminder letter with paper survey. <p>*****AFHS Non-response Follow-up*****</p> <p>The second additional component is to gather information, using open-ended interviews, from AFHS non-respondents, to better understand why people did not participate in the study.</p> <p>We identified the sampled addresses in AFHS Replicate 2 that: 1) did not respond to the screening invitation, 2) were located in Census Block Groups with more than 10% African-American or Hispanics, and 3) were in the top quartile of predicted probabilities of having a Spanish-speaker present. Then, based on the locations of available in-person interviewing staff from our organization, we sub-selected around 40 addresses from this list.</p>		
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Initially, face-to-face attempts will be made to recruit a household member at each of these addresses to participate in a short non-response follow-up (an open-ended interview). If these face-to-face attempts are not successful, we may then make up to seven contact attempts by telephone (for addresses where a telephone number is available through database searches (for example, MSG and Experian)).

SRO Project Period	06/2022 - 09/2023		
Data Col Period	06/2022 - 08/2022		
Security Plan	NA		
Milestones	<div><div><div>Pre Production Start:</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start:</div></div><div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End:</div></div></div>		
Other Project Team Members	Grant Benson Senior Project Advisor Wen Chang DMSS (inc.Dashboard) Raphael Nishimura DMSS (sample selection and Weights) Rebecca Gatward Survey Director James Rodgers Technical lead/MSMS lead Lloyd Hemingway Production Manager Dean Stevens Financial Analyst Andrew Hupp MSMS and Web survey expertise Deborah Wilson Help Desk Colette Keyser Blaise programmer (inc. Portal) Laura Yoder and Rose Zydel Data Managers		
Other Project Name	'A More Efficient Web-Based Approach to Collecting National Family, Fertility and Reproductive Health Data.		
Sample Mgmt System	MSMS; Project specific system (For non-response follow-up we will just use Excel.)		
Data Col Tool	Blaise 5		
Hardware	Paper and Pencil		
DE Software	External vendor (Data Force)		
QC Recording Tool	N/A		
Incentive	Yes, R; Yes, Other (for non-response follow-up we will use a non-monetary incentive.)		
Administration	SRO Group		
Payment Type	Check, post (\$10); Other (Non-monetary incentive)		
Payment Method	Check through other system (RPay (MSMS))		
<div></div>			
Report Period	May, 2023 (AFHS-Additional work)	Implementing	
Risk Level	On Track		
Monthly Updates	May updates SRO involvement is now minimal - The PI group plan to submit a new research proposal for the AFHS Panel in July 2023 and a state level project in October 2023. 6/19 - SRO has provided an updated (and final) SRO budget to the PI group.		
Special Issues			
Cost as of Jun 15, 2023	Total Cost to Date (direct + indirect):	58,334.63	
	Est Cost at Completion (E\$AC):	62,300.03	
	Total Budget:	50,265.00	
	Variance (Total Budget minus- E\$AC):	-12,035.03	
	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/month) until Sept'23 which increases the amount to be covered by sequestering funds. May'23 - Since last month the overspend on the main AFHS project decreased from \$11,704 to \$11,494.21. This was due to a refund of \$210 for uncashed cheques. The overall spend across both projects funded by the sequestering funds has decreased, by \$630, to \$74,288.	
Projections as of Jun 15, 2023	Dollars Projected for Month:	986.72	
	Actual Dollars Used:	492.70	
	Variance (Projected minus Actual):	494.02	
	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. I charged a few hours - mostly for meetings, in May. We also received a further refund of \$210 for uncashed cheques.

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

Other Measures

Project Name	(BFY) Baby's First Years												
Project Mode	Primary: Face to Face Total of Modes: 1												
Project Type	Sponsored Projects												
Budget	Direct Budget: 5,843,681.00	Indirect Budget: 1,994,180.73	Total Budget: 7,837,861.73										
Principal Investigator/Clients	Dr. Greg Duncan (University of California - Irvine)												
	Dr. Kimberly Noble (Teachers College Columbia University)												
	Dr. Katherine Magnuson (University of Wisconsin)												
Funding Agency	National Institute of Child Health and Human Development (NICHD)												
IRB	HUM#: HUM00137963	Period of Approval:											
Project Team	Project Lead: Piotr Dworak												
	Budget Analyst: Janelle P Cramer												
	Production Manager: Veronica Connors-Burge												
	Senior Project Advisor: Stephanie A Chardoul												
	Production Manager 1: Margaret Lavanger												
	Production Manager 2: Michelle Smith												
Proposal #	no data												
Description	<p>University of Michigan Survey Research Center (U-M SRC) is contracted to recruit and interview participants for Baby's First Years -- a longitudinal randomized control trial study.</p> <p>The study's full name, listed on sub-contract documents, is Household Income and Child Development in Early Years. The study will draw on a convenience sample of mothers and their newborns in four US metropolitan areas: New York City; Omaha/Lincoln; New Orleans; and Minneapolis. One or two hospitals, listed in this application, will be used as recruiting sites in each area. The study uses a randomized control trial design in which low-income mothers and newborns will be randomly assigned to a treatment group that receives an unconditional income enhancement -- cash payments of \$333 per month—an amount roughly comparable to a variety of income assistance policies in the U.S. and shown to be associated with meaningful improvements for poor children in prior studies—or to a control condition that receives \$20 per month. In both groups, the payments will be made for the first 40 months of the child's life. To understand the impacts of added income on children's development, researchers will assess treatment/control group differences at ages 1, 2 and 3 on measures of cognitive, language, memory, self-regulation and socio-emotional development. Recruitment is scheduled to start in April of 2018, and each follow-up interview will be conducted 12 months later -- close in time to the child's 1st, 2nd, and 3rd birthday. The feasibility of the approach has been established in a one-year pilot conducted in 2014 at the New York Presbyterian Hospital/Columbia University Medical Center.</p> <p>The Principal Investigators are Dr. Greg Duncan from University of California Irvine (UCI), Dr. Kimberly Noble from Teacher's College Columbia University (TCCU), and Katherine Magnuson from University of Wisconsin-Madison (UWM). UCI (Dr. Duncan) and TCCU (Dr. Noble) are the institutions and signatories funding the U-M SRC subcontract from various sources including the National Institute for Child Health and Human Development (NICHD) and private foundations listed in this application. The study research team also includes co-investigators Lisa Gennetian (New York University), and Hiro Yoshikawa (New York University).</p> <p>SRO will be responsible for four interactions with the selected mothers/infants:</p> <ul style="list-style-type: none"> • Baseline will occur immediately (within 24-48 hours) after birth, in the hospital; • Wave 1 will be a telephone interview with the mother when the child is 12 months old; • Wave 2 will be an in-person interview in the family's home that includes survey, developmental assessment, biomarker collection, and video recorded behavioral interaction when the child is 24 months old; • Wave 3 will be an in-person survey done while the mother and child are visiting a lab for other clinical tests when the child is 36 months old. <p>Each data collection phase/wave will be a full 12 months, with Baseline starting in April 2018:</p> <p>Recruitment/Baseline: 04/01/2018 - 03/31/2019 Wave 1: 04/01/2019 - 03/31/2020 Wave 2: 04/01/2020 - 03/31/2021 Wave 3: 04/01/2021 - 03/31/2022</p>												
SRO Project Period	10/2017 - 12/2020												
Data Col Period	04/2018 - 12/2020												
Security Plan	NA												
Milestones	<table border="0"> <tr> <td>Pre Production Start: 10/01/2017</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start: 01/01/2018</td> </tr> <tr> <td>Staffing Complete: 02/07/2018</td> <td>GIT Start: 03/19/2018</td> </tr> <tr> <td>SS Train Start: 03/20/2018</td> <td>SS Train End: 03/22/2018</td> </tr> <tr> <td>DC Start: 05/07/2018</td> <td>DC End: 06/30/2022</td> </tr> </table>			Pre Production Start: 10/01/2017	Pretest Start:	Pretest End:	Recruitment Start: 01/01/2018	Staffing Complete: 02/07/2018	GIT Start: 03/19/2018	SS Train Start: 03/20/2018	SS Train End: 03/22/2018	DC Start: 05/07/2018	DC End: 06/30/2022
Pre Production Start: 10/01/2017	Pretest Start:												
Pretest End:	Recruitment Start: 01/01/2018												
Staffing Complete: 02/07/2018	GIT Start: 03/19/2018												
SS Train Start: 03/20/2018	SS Train End: 03/22/2018												
DC Start: 05/07/2018	DC End: 06/30/2022												

Other Project Team Members	Stephanie Chardoul (SPA) Piotr Dworak (Lead) Tony Romanowski (PM) Daric Thorne (PM/SSA) Barb Homburg (PM) Peggy Lavanger (PM) Jim McClure (DCS) Jeff Smith (tech lead) Jim Rodgers (MSMS consultant) Andrew Hupp (MSMS consultant) Pam Swanson (MSMS programmer) Kyle Kwaiser (Data Manager) Dave Dybicki (Blaise) Colette Keyser (Blaise) Tricia Blanchard (MSMS) Kyle Goodman (Help Desk)	
Other Project Name	HHICD Household Income and Childhood Development	
Sample Mgmt System	MSMS	
Data Col Tool	Blaise 5	
Hardware	Laptop; [UM cell] Phone	
DE Software	N/A	
QC Recording Tool	Other (to be specified)	
Incentive	Yes, R	
Administration	SRO Group	
Payment Type	Cash, prepaid (50)	
Payment Method	Check through other system (MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (MSMS)	
<hr/>		
Report Period	May, 2023 (BFY)	Implementing
Risk Level	On Track	
Monthly Updates	<p>BFY Age 5- 8:</p> <p>BFY has awarded SRO continuing work throughout Age 8 (August 2027). We are currently conducting a one-time Age5 Catch Up activity re-contacting all Rs who completed Age 4 Lab Visit but have not had their contact information updated since. In August 2023, we will switch to an ongoing follow up with respondents at 4, 8, then 12 months past their 4, 5, 6, and 7 year birthday.</p> <p>Age 0 - 4 Update:</p> <p>Note: BFY Age 3 main data collection has ended on June 30, 2022 with 922 completes exceeding the goal of 907 (and the proposal goal of n=860).</p> <p>Between July 2022 and April 2023 interviewers conducted the Age3 + 3-month, +6-month, and +10-month check-in calls or visits to confirm and update contact information and invite respondent to a lab visit conducted by the PI research teams at Age 4. At Age 3 + 10-month we handing the cases off to the local lab research teams.</p> <p>On 5/22/2023, we delivered the last batch of cases to the lab.</p> <p>However, interviewers still continue locating hard-to-reach cases through the end of Age 4 on July 31, 2023 in addition to the new scope mentioned above.</p> <p>We also continue to follow the plan outlined during the September BFY advisory board meeting wherein our SRC iwers help Lab teams achieve their response rate targets. We are conducting line-by-line reviews and guide RAs/Site Coordinators in strategies for those cases, providing in-service training similar to the training offered to our lwers (e.g., addressing R concerns, etc.), and directly reaching out to and locate some hard-to-reach Rs. We have worked on ~ 100 cases and part of that effort includes upcoming trips to NOLA in May and June.</p> <p>Age 4 Staffing: 12 iwers in total NE: 1 OS + 1 NH (Trained 9/15) MN: 2 NY: 4 OS (1 consolidated in October 2022) NOLA: 1 (1 June resignation) TLs: 1 (- 1 has gone to HRS)</p> <p>Technical system: All tech systems are working as needed.</p> <p>Finances: A notification was sent to the PIs on 1/20 estimating the total expected underrun may reach ~ \$300K. PIs are expected to apply this underrun to extending SRO involvement through Age 6 or 8.</p>	
Special Issues		
Cost as of Jun 15, 2023	Total Cost to Date (direct + indirect):	7,391,696.76

Est Cost at Completion (E\$AC):		7,482,218.51		
Total Budget:		7,837,861.73		
Variance (Total Budget minus- E\$AC):		355,643.22		
Reason for Variance:		We continue to extend underrun even after adjusting the budget to forecast all potential sources of underrun - mainly due to decreasing demand for SRO assistance with the current active cases and a delay in engaging SRO in the future contact update activities. However, Pls are on the cusp of formally extending SROs engagement through Age 8 of the focal child and part of that engagement will be funded from the current underrun.		
Projections as of Jun 15, 2023	Dollars Projected for Month:	62,719.42		
	Actual Dollars Used:	26,153.91		
	Variance (Projected minus Actual):	36,565.51		
	Reason for Variance:	Despite adjustments, we continue to see underrun due to lower iwer hours and savings in the project management time.		
Measures		Units at Complete	RR	HPI
	Current Goal:	907	91%	7.0
	Goal at Completion:	907	91%	7.0
	Current Actual:	921	92%	5.7
	Estimate at Complete:	926	92%	6.0
	Variance:			
Other Measures				

Project Name	(BHM Library Project) Developing a Model of Black History Month Programming in Public Libraries		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 126,712.00	Indirect Budget: 70,959.00	Total Budget: 197,671.00
Principal Investigator/Clients	Deborah Robinson (ISR)		
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Karin Schneider		
	Budget Analyst:		
	Production Manager:		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	SRO will support the project in the first year by working with you to design the sample. SRO will support the implementation of up to two pilot surveys and the larger national survey of libraries. We will provide consultation on scale development throughout the pilot phase and provide statistical support to finalize the scales and provide a working dataset (with weights to account for the stratified sample design). In total, the SRO period of performance will be approximately 24 months in duration, starting in February of 2023, with data collections for the pilots and national survey taking place over approximately 12 months, starting in late 2023.		
SRO Project Period	02/2023 - 02/2025		
Data Col Period	10/2023 - 09/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name	Developing a Model of Black History Month Programming in Public Libraries		
Sample Mgmt System	Web SMS		
Data Col Tool	Blaise 5		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Not used		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	May, 2023 (BHM Library Project)		Planning
Risk Level	Some Concerns		
Monthly Updates	No substantial progress to report this month. We are a bit closer to a pilot questionnaire, the comment period is now closed for the wider advisory panel on measures to include for the largest set of questions for the pilot.		
Special Issues	See above.		
Cost as of Jun 07, 2023	Total Cost to Date (direct + indirect):	11,829.41	
	Est Cost at Completion (E\$AC):	182,245.65	
	Total Budget:	197,671.00	
	Variance (Total Budget minus- E\$AC):	15,425.35	
	Reason for Variance:	NA	
Projections as of Jun 07, 2023	Dollars Projected for Month:	17,584.27	
	Actual Dollars Used:	2,422.37	

Reason for Variance: Continued lower activity than anticipated. Have not had more sampling tasks, still need some final decisions on inclusion of "close

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

Other Measures

Project Name	(CARE Military) Concussion Assessment, Research and Education (CARE) Consortium 2022 - Military		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 1,131,747.00	Indirect Budget: 294,254.00	Total Budget: 1,426,001.00
Principal Investigator/Clients	Dr. Steven Broglio (U of M Kinesiology) Dr. Micheal McCrea /Dr. Pasquina (Medical College of Wisconsin/Uniformed Services Un) Dr. Thomas McAllister (Indiana University School of Medicine)		
Funding Agency	NCAA and DoD		
IRB	HUM#: 00202691		Period of Approval: 7/23/2021 - open
Project Team	Project Lead: Donnalee Ann Grey-Farquharson Budget Analyst: Carl S Remmert Production Manager: Stacy Quisenberry Senior Project Advisor: Barbara Lohr Ward Production Manager 1: Hongyu Johnson Production Manager 2: Keith Liebetreu		
Proposal #	no data		
Description	<p>The project follows academy cadets post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure.</p> <p>This project has an overall SRO involvement period of 13 months, beginning March 2022, with data collection taking place over approximately 12 months starting mid-March 2022. SRO provides consultation, respondent locating activities and data collection for respondents in the uniformed services sample.</p> <p>The goal is to secure participation from approximately 3,200 unique past-CARE study participants. Participants will complete a study assessment once over the 13-month project period. SRO decentralized field interviewers locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct approximately 1,425 telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.</p> <p>The estimate total cost for the overall scope of work is \$1,426,001.00. This includes \$1,131,747.00 direct and \$294,254.00 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders).</p>		
SRO Project Period	02/2022 - 03/2023		
Data Col Period	03/2022 - 02/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Donnalee Grey-Farquharson, Stacy Quisenberry, Hongyu Johnson, Keith Liebetreu, James Koopman, Minako Edgar, David Ackuaku, Carl Remmert		
Other Project Name	CARE-CSI Military		
Sample Mgmt System	Other (non-SRO)		
Data Col Tool	Other (non-SRO)		
Hardware	Laptop; [UM cell] Phone		
DE Software	N/A		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	Other (Kinesiology)		
Payment Type	Check, post (\$150)		
Payment Method	Other (Kinesiology)		
<hr/>			
Report Period	May, 2023 (CARE Military)		Implementing
Risk Level	On Track		
Monthly Updates	1. Project Management: SRO is receiving additional NCAA fund of \$259,901.17 to continue military data collection beyond May 2023. The		

Sample size will not be increased per the initial agreement with the additional funding.

SRO has not start any military work in May yet.

2. Care SMS system update:

SRO continues to work with QG to prepare system for DCP3 training.

SRO staff continue to test system with TLs' help.

3. Questionnaire Development:

SRO signed off the CATI survey testing and prepared scripts for training.

4. Production:

4. Production: DCP3 started on 5/25/2023

Production Stats as of 05/31/2023:

3587 Released: Total Comp lws-13 – 0.4% (Web-13 -0.4%, CATI-0 -0.0%)

5. Hiring and Training:

Training (05/17-05/19) – 4 hours a day for 3 days, went well. Currently we have 28 field staff on the project.

6. DMSS:

SRO finalized and assigned CDP3 samples to iwers.

SRO discussed path to save DCP3 daily data and daily reports

7. Locating:

The Locating team continues to use the full spectrum of messages approved by IRB to communicate with the respondents.

There was no cases in locating for military in May

Special Issues

Cost as of	Total Cost to Date (direct + indirect):	1,429,519.29
	Est Cost at Completion (E\$AC):	1,685,412.76
	Total Budget:	1,426,001.00
	Variance (Total Budget minus- E\$AC):	489.94
	Reason for Variance:	SRO received NCAA fund of \$259,901.17 to continue military data collection beyond May 2023. Military work is closed by the end of April. The underrun for Military is still showing. This is because the transfer of interviewer hours haven't been processed yet. We will update when all the costs on Military have been completed.

Projections as of	Dollars Projected for Month:	40,124.65
	Actual Dollars Used:	42,077.99
	Variance (Projected minus Actual):	-1,953.34
	Reason for Variance:	

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

Other Measures

Project Name	(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022												
Project Mode	Primary: Telephone	Secondary: Web	Total of Modes: 2										
Project Type	Sponsored Projects												
Budget	Direct Budget: 3,718,978.00	Indirect Budget: 966,936.00	Total Budget: 4,685,914.00										
Principal Investigator/Clients	Dr. Steven Broglio (U of M Kinesiology)												
	Dr. Michael McCrea (Medical College of Wisconsin)												
	Dr. Thomas McAllister (Indiana University School of Medicine)												
Funding Agency													
IRB	HUM#: 00202691	Period of Approval: 7/23/2021 - open											
Project Team	Project Lead: Donnalee Ann Grey-Farquharson												
	Budget Analyst: Carl S Remmert												
	Production Manager: Stacy Quisenberry												
	Senior Project Advisor: Barbara Lohr Ward												
	Production Manager 1: Hongyu Johnson												
	Production Manager 2: Keith Liebetreu												
Proposal #	no data												
Description	<p>SRO will provide consultation, respondent locating activities and data collection for respondents in the longitudinal Concussion Assessment, Research and Education (CARE) study, with the goal of securing participation from 7,500 unique past-CARE study participants. Participants will complete the same set of study assessments at two time points over the five-year project period. The project follows collegiate athletes post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure. Specifically, SRO decentralized field interviewers will locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.</p> <p>This budget assumes an overall SRO involvement period of approximately 44 months over two waves. Wave 1 SRO involvement will begin in December 2021 with data collection taking place over approximately 12 months, beginning approximately May 2022. Wave 2 SRO involvement will begin in November 2023 with data collection taking place over approximately 12 months starting in May 2024.</p> <p>Currently, the total cost for the overall scope of work (based on the currently committed funding from all sources) is estimated at \$4,685,914. This includes \$3,718,978 direct and \$966,936 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders). As additional sources of funding are identified and those resources committed to SRO survey data collection activities, or inversely if a funder withdraws or reduces their level of funding to the project, the scope of work (e.g., the number of interviews to be collected) will increase or decrease respectively.</p> <p>The estimate of funding contributed by the Department of Defense through the MTEC RFP is \$2,277,689. This includes \$1,807,689 direct costs and \$470,000 indirect costs budgeted at the 26% indirect cost rate. The proposed period of support is September 1, 2021 through August 31, 2025.</p>												
SRO Project Period	10/2021 - 08/2026												
Data Col Period	03/2022 - 02/2026												
Security Plan	NA												
Milestones	<table> <tr> <td>Pre Production Start:</td><td>Pretest Start:</td></tr> <tr> <td>Pretest End:</td><td>Recruitment Start:</td></tr> <tr> <td>Staffing Complete:</td><td>GIT Start:</td></tr> <tr> <td>SS Train Start:</td><td>SS Train End:</td></tr> <tr> <td>DC Start:</td><td>DC End:</td></tr> </table>			Pre Production Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Complete:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
Pre Production Start:	Pretest Start:												
Pretest End:	Recruitment Start:												
Staffing Complete:	GIT Start:												
SS Train Start:	SS Train End:												
DC Start:	DC End:												
Other Project Team Members	Donnalee Grey-Farquharson, Stacy Quisenberry, Hongyu Johnson, Keith Liebetreu, James Koopman, Minako Edgar, David Ackuaku, Carl Remmert												
Other Project Name	CARE CSI, CARE SALTOS												
Sample Mgmt System	Other (non-SRO)												
Data Col Tool	Other (non-SRO)												
Hardware	Laptop; [UM cell] Phone												
DE Software	N/A												
QC Recording Tool	N/A												
Incentive	Yes, R												
Administration	UM Group (Kinesiology)												
Payment Type	Check, post (\$150.00)												

Payment Method	Check through other system (UM)			
<hr/>				
Report Period	May, 2023 (CARE SALTOS MTEC)		Implementing	
Risk Level	On Track			
Monthly Updates	<p>1. Project Management: SRO requested sample categories and target groups for DCP3 in advance in order to work samples smartly. 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.</p> <p>2. CARE SMS system update: SRO continues to work with QG to resolve system issues in order to prepare for DCP3. SRO staff continue to test system with TLs' help.</p> <p>3. Questionnaire Development: SRO signed off the CATI survey testing and prepared scripts for training.</p> <p>4. Production: DCP3 started on 5/25/2023 Production Stats as of 05/31/2023: 2421 Released: Total Comp lws-11 – 0.5% (Web-11 -0.5%, CATI-0 -0.0%)</p> <p>5. Hiring and Training: Training (05/17-05/19) – 4 hours a day for 3 days, went well. Currently we have 28 field staff on the project.</p> <p>6. DMSS: SRO finalized and assigned CDP3 samples to iwers. SRO discussed path to save DCP3 daily data and daily reports</p> <p>7. Locating: The Locating team continues to use the full spectrum of messages approved by IRB to communicate with the respondents. Civilian find rate: 2.5%</p>			
Special Issues				
Cost as of May 31, 2023	Total Cost to Date (direct + indirect):		1,092,209.70	
	Est Cost at Completion (E\$AC):		4,684,455.84	
	Total Budget:		4,685,914.00	
	Variance (Total Budget minus- E\$AC):		1,458.16	
	Reason for Variance:			
Projections as of May 31, 2023	Dollars Projected for Month:		11,951.79	
	Actual Dollars Used:		59,192.00	
	Variance (Projected minus Actual):		-47,240.21	
	Reason for Variance:		interviewers worked a lot more hours on training and civilian samples than projected as well as reversing the dollar amount in funding for adjustment. MTEC is showing a big variance in May compared to what was projected. A large reason for this is because we expected the transfer to go through in May so that was factored into projections.	
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	<p>Revised project costs are \$635,344 (\$625,726 + \$9,618). Original description below. Focus groups completed as designed. Project has been revised in that the PI has requested only an initial replicate be used for the survey pending full funding availability. Also, full indirect rate is not applied as we originally indicated. ORSP and Financial Services determined this was not research but was in fact other sponsored activity. IDC revised to 29%. ORIGINAL DESCRIPTION:</p> <p>SRO will conduct two exploratory focus groups and web-based data collection to study awareness, use and adoption of crypto-assets in the general population and more specifically among those more informed about crypto-assets. SRO will screen an address-based representative sample of approximately 40,980 U.S. households for adults who hold or have held crypto-assets. All who report crypto-asset holdings will be invited to participate in the web survey, along with a random sub-sample of those who have not held crypto-assets. SRO interviewers will conduct reminder calling to non-respondents to encourage them to participate in the survey.</p> <p>This budget assumes an overall SRO involvement period of 12 months commencing in May 2022 with focus groups taking place in May or early June 2022 and the web data collection taking place during a 5-month period beginning September 2022. The total cost for this work is estimated at \$1,724,766 (\$1,105,619 direct, \$619,147 indirect), budgeted at the University-approved indirect recovery rate of 56 percent. \$635,344 (\$625,726 + \$9,618).</p>		
SRO Project Period	05/2022 - 04/2023		
Data Col Period	10/2022 - 02/2023		
Security Plan	NA		
Milestones	<div><div><div>Pre Production Start: 08/01/2022</div><div>Pretest End:</div><div>Staffing Complete: 10/14/2022</div><div>SS Train Start: 11/29/2022</div><div>DC Start: 11/02/2022</div></div><div><div>Pretest Start:</div><div>Recruitment Start: 09/14/2022</div><div>GIT Start: 11/29/2022</div><div>SS Train End: 11/29/2022</div><div>DC End: 03/01/2023</div></div></div>		
Other Project Team Members	Karin Schneider conducted focus group. Survey phase led by Piotr Dworak. Team include Ian Ogden and Xiomara Guerra.		
Other Project Name	American Household Digital Finance Survey		
Sample Mgmt System	Web SMS		
Data Col Tool	Blaise 4.8		
Hardware	Other		
DE Software	N/A		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Cash, prepaid (\$2); Other (survey completes paid by check)		
Payment Method	Check through other system (focus groups recd e-gift card (Tango))		
Report Period	May, 2023 (CRUSE - AHDFS)		Closing
Risk Level	On Track		
Monthly Updates	Crypto has delivered the final data and weights and is awaiting any client questions / feedback before closing.		

In terms of final production yields -----

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

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

Crypto Releases and invitation dates:

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

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

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

Sample balancing:

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

Finance:

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

Special Issues

Cost as of Jun 15, 2023	Total Cost to Date (direct + indirect):	548,977.84
	Est Cost at Completion (E\$AC):	548,977.84
	Total Budget:	606,052.00
	Variance (Total Budget minus- E\$AC):	57,074.16
	Reason for Variance:	Underrun is mostly due to savings in management and tech costs as well as not reaching the projected iwer hours. Lower actual hours allowed us to extend the lab involvement through early April and fund additional sample required to meet the goal.
Projections as of Jun 15, 2023	Dollars Projected for Month:	14,144.18
	Actual Dollars Used:	25,987.74
	Variance (Projected minus Actual):	-11,843.56
	Reason for Variance:	Additional vendor PO was projected in March but paid in April.

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

Other Measures

Project Name	(DCUS) Daily Cannabis Use Study		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 49,742.00	Indirect Budget: 0.00	Total Budget: 49,742.00
Principal	Brady West (ISR)		
Investigator/Clients	Sean McCabe (ISR)		
Funding Agency	National Institutes of Health (NIH)		
IRB	HUM#: HUM00229404	Period of Approval: Pending	
Project Team	Project Lead: Gary Hein		
	Budget Analyst: David Kellermeyer		
	Production Manager:		
	Senior Project Advisor: Rebecca Gatward		
	Production Manager 1: Rebecca Loomis		
	Production Manager 2:		
Proposal #	no data		
Description	This study aims to decipher the daily motives for cannabis use among light and heavy cannabis users, and their associations for longer-term use behaviors. We will recruit 50 cannabis users via the MICHHR database and assign them to into groups of 25 'light' users and 25 'heavy' users based on a screener survey. Selected candidates will be asked to complete a baseline survey of about 10 or 15 minutes, 28 daily surveys of about 5 minutes, and a follow up survey of 15-20 minutes. Respondents will be paid up to \$96 for participating (\$2 per daily survey completion for up to 28 days, \$20 for the baseline survey completion and \$20 for the follow up survey completion).		
SRO Project Period	01/2023 - 06/2023		
Data Col Period	04/2023 - 06/2023		
Security Plan	Yes		
Milestones	<div>Pre Production Start: 01/17/2023</div> <div>Pretest End:</div> <div>Staffing Complete:</div> <div>SS Train Start:</div> <div>DC Start:</div> <div>Pretest Start:</div> <div>Recruitment Start:</div> <div>GIT Start:</div> <div>SS Train End:</div> <div>DC End:</div>		
Other Project Team Members	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	May, 2023 (DCUS)		Planning
Risk Level	On Track		
Monthly Updates	All hours in May spent in pre-production working on: 1- Writing and submitting IRB Amendment 2- Meetings with PIs and SRO team to discuss project updates and fielding/recruitment plans. 3- Additional programming/testing of screener and daily surveys.		
Special Issues			
Cost as of Jun 19, 2023	Total Cost to Date (direct + indirect):		16,258.15
	Est Cost at Completion (E\$AC):		32,716.40

Total Budget:		49,742.00		
Variance (Total Budget minus- E\$AC):		17,025.60		
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 Jun 19, 2023	Dollars Projected for Month:	12,693.68		
	Actual Dollars Used:	2,636.90		
	Variance (Projected minus Actual):	10,056.78		
	Reason for Variance:	~\$8000 in incentives did not hit in May due to delaying the project for an amendment. Project team hours were lower since we did not go into field.		
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: 336,908.00	Indirect Budget: 188,668.00	Total Budget: 525,576.00
Principal Investigator/Clients	Nigel Paneth (Michigan State University)		
	Michael Elliott (University of Michigan)		
	Jean Kerver (Michigan State University)		
Funding Agency	NIH		
IRB	HUM#: HUM00139050	Period of Approval: 10/2/2021-8/13/2022	
Project Team	Project Lead: Shonda R Kruger-Ndiaye		
	Budget Analyst: William Lokers		
	Production Manager:		
	Senior Project Advisor: Evanthia Leissou		
	Production Manager 1: Ian Ogden		
	Production Manager 2: Sharon K Parker		
Proposal #	no data		
Description	<p>The goal of ECHO is to understand pressing childhood health concerns such as autism spectrum disorders, low birth weight and childhood obesity. The project will collect survey data and a series of bio-specimens in order to assess the effects of persistent organic pollutants and heavy metals, maternal nutritional or weight status in pregnancy, and pregnancy infection and inflammation on the health of children.</p> <p>The study includes two sample cohorts: a cohort from previous, ongoing data collection efforts as well as new sample. This existing sample cohort includes mothers and children recruited in 2011 or later for the Archive for Research in Child Health (ARCH) study in the Lansing area. The newly recruited sample cohort, MARCH (Michigan Archive for Research in Child Health), will consist of 1,100 pregnant women: 1) a statewide probability sample of 1,000 women from 20 prenatal clinics affiliated with 10 hospitals located in Ann Arbor, Dearborn, Detroit, Grand Rapids, Novi, Saginaw, Port Huron and Traverse City, and 2) 100 women from one clinic in Flint.</p> <p>SRO's work scope is divided into two phases. During Phase 1, SRO provided assistance with prenatal questionnaire development and designed technical systems for MARCH cohort recruitment conducted by Michigan State University-employed (and other hospital-employed) interviewers and affiliated project staff. During Phase 2, SRO developed systems and is conducting data collection for MARCH sample 3-month. The MARCH age 4-5 follow up interviews and home visits are also in SRO's work scope. All other follow up protocols with the MARCH sample will be administered via REDCap by the MSU team (e.g. at 9-month, age 2 and age 3).</p> <p>For the MARCH sample, expectant mothers are recruited during their initial prenatal visit to a healthcare provider. During a follow up phone call, respondents are asked to complete an interview about nutrition, levels of physical activity, use of healthcare services, physical and mental health, prescription medications and other substance use. In addition, women are asked to give blood samples in the first and second trimesters and urine samples in all three trimesters.</p> <p>The sample recruitment and administration of prenatal interviews is conducted by MSU-employed (and other hospital-employed) interviewers using SRO's technical systems and laptops. SRO programmed all questionnaires administered during recruitment, the sample management system(s), and the system to keep track of the collection and storage of blood and urine samples. When babies are born, the research team obtains hospital birth records for the mother and child and a placenta sample. The first MARCH babies were born in early 2018.</p> <p>SRO's data collection activities start after the MARCH babies are born. The first interview with the mother is done when the baby is 3-6 months old. Mothers are interviewed again by MSU when the children are 9-12 months old, and yearly after that until the child is 4 years old. When the children are 3 months old, mothers are asked to provide a child fecal sample and toenail clippings, and at age 4 they will provide shed teeth. Children from the MARCH cohort will be assessed using standardized developmental assessments at 4-5 years old. The assessments will be done during in-home visits.</p>		
SRO Project Period	01/2017 - 08/2023		
Data Col Period	05/2018 - 08/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		

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

Other Project Name

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

Report Period	May, 2023 (ECHO (Year 7))	Implementing
Risk Level	On Track	
Monthly Updates	<p>[Phase 1: Recruitment and Prenatal Surveys]</p> <p>The MARCH recruitment target was 1,110 mothers / live births. Recruitment is done and the final count is 1,113.</p> <p>-----</p> <p>Prod Stats as of 6/20/23</p> <p>[Phase 2: 3-Month Data Collection]</p> <p>3-month sample released: 1073</p> <p>3-month interviews completed: 783</p> <p>Average attempts / lw: 7.6</p> <p>lw length: 37 min</p> <p>Response Rate: 74%</p> <p>3-month biospecimen collected: 446</p> <p>-----</p> <p>[Phase 3: Age 4 REDCap Survey]</p> <p>Age-4 sample released: 392</p> <p>REDCap surveys completed: 280</p> <p>Response Rate: 72%</p> <p>-----</p> <p>[Phase 3: Age 4 In-Person Visit Protocols]</p> <p>Age-4 IPV sample released: 220</p> <p>In-person visits completed: 73</p>	

Special Issues	SRO has made good progress in working with MSU to define close out procedures for each component. As of the writing of this report, the ECHO team (without SRO) has been old they will be awarded funding for the ongoing data collection, however, they don't yet know the amount.
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Cost as of Jun 15, 2023	Total Cost to Date (direct + indirect):	379,611.99
	Est Cost at Completion (E\$AC):	507,521.00
	Total Budget:	525,576.00
	Variance (Total Budget minus- E\$AC):	18,055.00
	Reason for Variance:	There were changes in both directions but the net was a significant reduction in projected costs. We added \$1,250 back in to cover an unexpected Illume bill, but that was more than offset by reductions we made to regular staff time and the Illume recharge (reflecting its discontinuation), and interviewer time (adjusted to reflect the earlier

end dates for the components).

Projections as of Jun 15, 2023	Dollars Projected for Month:	41,464.59
	Actual Dollars Used:	43,302.63
	Variance (Projected minus Actual):	-1,838.04

Reason for Variance: lwer III time and SSA time came in higher than projected, as did the Equipment Use Charge-Interfund (CAPI).

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	<p>The overall project is funded by a consortium (currently consisting of both OpenResearch Lab (Open) and NIH. OpenResearch Lab (Open) (formerly Y Combinator Research) and the principal investigators are conducting an evaluation of Every Dollar Counts, a cash assistance gift program being administered by two non-profit organizations: CitySquare, based in Dallas, Texas, and Heartland Alliance, located in Chicago, Illinois (the Community Partners).</p> <p>The purpose of this study is to explore how the program affects multiple dimensions of recipients' lives. Key outcomes of interest include health, subjective and material well-being, time use, financial health, labor market participation, social and civic engagement, and effects on children. SRO concluded the Baseline interviews in 2020, and the Midline interviews in July 2022. The EDC Endline project will reach out to all Baseline respondents for completion of a telephone interview, followed by an in-person interview (with cognitive tasks, anthropometric measurements and collection of dried blood spots) for those respondents still in the greater Chicago area or greater Dallas/Ft. Worth area. Data collection will take place between March 2023 and late September 2023. SRO assumes approximately 91% of the 2,990 Baseline respondents are located and willing to be interviewed again (2,720 90-minute telephone interviews). SRO assumes that in-person interviews will be completed with 2,003 respondents still living in the greater Chicago or Dallas/Ft. Worth and Waco area. About 400 respondents are known to currently reside outside of these areas; these respondents will not be asked to complete an in-person interview. The in-person interviews will include collection of consent for administrative data collection, collection of Social Security number, completion of self-administered on-line cognitive assessments, collection of blood pressure, height, weight, and dried blood spots. We assume that 1,957 respondents will participate in the dried blood spot collection. Following collection of the dried blood spots, SRO interviewers will package and ship the dried blood spot cards to the laboratory chosen by ORL.</p> <ul style="list-style-type: none">• Our budget assumes up to 2,720 telephone interviews are completed and allows for at least six telephone attempts on all non-resistant cases with working telephone numbers. SRO will track and monitor contact attempts to examine the efficacy of contact windows in the first replicate of the sample.• The budget assumes approximately 2,003 cases complete the in-person component and 1,957 consent to the DBS collection.• Mileage costs for fieldwork are budgeted at 2,003 trips of no more than 120 miles per round trip.• Cash incentives of \$15,000 are included in the budget estimate to facilitate in-person payments to reluctant and hard-to-reach participants and individuals who are asked to assist in the location of these participants. All other participant incentive payments are the responsibility of Open.• Supplies/kits for DBS are included in the estimate consistent with our most recent project experience. Further discussion with the University of Washington laboratory may result in the refinement of the materials and method for drying the bio specimens and associated costs of project supplies. <p>SRO will conduct standard data cleaning and produce a preliminary and final dataset with documentation. Standard data cleaning does not include customization (such as derived variable or index creation, dataset merging, sample weighting, recoding, or coding of other-specify responses). We will ensure that all components of a case are present with a reference variable (SID, OID) to allow for merging and data analysis. Our main documentation is conveyed through data dictionaries and a questionnaire codebook.</p> <p>We have not budgeted for coding any open-ended responses.</p> <p>Deliverables:</p> <ul style="list-style-type: none">• SRO will provide daily, automated delivery of questionnaire data, cognitive tasks, and sample management system data for cases with a final disposition and sample management system data for all cases that have been released to interviewers.• Sample management data that will be delivered daily to Open will include the following case-level variables:<ul style="list-style-type: none">o Contact attempts? number by type (SMS, phone, email, in-person)? date/time of last attempto Appointments? date/time of scheduled appointments? occurrence of broken / missed appointments? how appointment was made (self-scheduler/by interviewer)o Current incentive assigned to the sample lineo SRO will work with Open during pre-production to finalize variables and format.• We will work with Open between completion of active data collection and end of the funding period for Endline to reconcile any outstanding discrepancies in the data.• SRO will also deliver:<ul style="list-style-type: none">o Daily data collection progress reportso A final summary of field methods at the end of data collectiono A full survey dataset with all participant contact information at the close of data collection.		

SRO Project Period	01/1996 - 01/1996			
Data Col Period				
Security Plan	NA			
Milestones	<div> <div> Pre Production Start: 09/01/2022 Pretest End: Staffing Complete: 02/27/2023 SS Train Start: 03/20/2023 DC Start: 03/27/2023 </div> <div> Pretest Start: Recruitment Start: 02/01/2023 GIT Start: SS Train End: 03/24/2023 DC End: 08/19/2023 </div> </div>			
Other Project Team Members	In addition to the above: Ian Ogden (SSS, Tech Coordinator); Anna Fuqua-Smith (SSI); Austin De Spirito (SSA); Jeff Smith (Tech Lead); Marsha Skoman (SurveyTrak); Heuchun Peng and Shaowei Sun (Self-Scheduler); Peter Sparks & Kelly Liesko (Blaise); Stephanie Windisch and Jennie William (Data Management); Ashwin Dey and Darnell Franklin (Webtrak, Weblog, Reports)			
Other Project Name				
Sample Mgmt System	SurveyTrak; Project specific system (Self-Scheduler for Telephone)			
Data Col Tool	Blaise 4.8; Other (ArcGIS - Survey 123)			
Hardware	Laptop; [UM cell] Phone			
DE Software	N/A			
QC Recording Tool	DRI-CARI			
Incentive	Yes, R; Yes, INF			
Administration	SRO Group; Other (PI Payment)			
Payment Type	Cash, post (\$10 or \$20 For Dried Blood Spots); Other (\$20 Finders Fee)			
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)			
<hr/>				
Report Period	May, 2023 (EDC-Endline)		Implementing	
Risk Level	On Track			
Monthly Updates	Production continues to be efficient and is going very smoothly.			
Special Issues				
Cost as of Jun 07, 2023	Total Cost to Date (direct + indirect):		737,277.24	
	Est Cost at Completion (E\$AC):		1,524,002.72	
	Total Budget:		3,097,511.00	
	Variance (Total Budget minus- E\$AC):		1,573,508.28	
	Reason for Variance:		NA	
Projections as of Jun 07, 2023	Dollars Projected for Month:		268,198.33	
	Actual Dollars Used:		198,894.63	
	Variance (Projected minus Actual):		69,303.70	
	Reason for Variance:		NA	
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(HART) Health, Aging, and Retirement in Thailand (HART) - SRO consultation (2023)		
Project Mode	Primary: Not Available		
Project Type	Sponsored Projects		
Budget	Direct Budget: 55,460.00	Indirect Budget: 16,083.00	Total Budget: 71,543.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#: NA	Period of Approval:	
Project Team	Project Lead: Nicole G Kirgis Budget Analyst: Dean E Stevens Production Manager: Senior Project Advisor: Production Manager 1: Rebecca Gatward Production Manager 2:		
Proposal #	no data		
Description	<p>SRO to provide consultation and guidance on components of the Health, Aging, and Retirement in Thailand wave 5 data collection. SRO assisted the Center for Aging Society Research in the transition from PAPI to CAPI data collection for HART wave 2 in 2016-18. For wave 3 and 4, HART used QuestionPro for data collection. The study is now interested in SRO's consultation and guidance on returning to Blaise for the questionnaire and SurveyTrak and WebTrak for sample and production management. The budget covers time for the following:</p> <ul style="list-style-type: none"> - consultation on the preparation of technical systems for wave 5 - including liaising with Statistics Netherlands on licensing and the use of Blaise, - assisting with training on sample design and implementation and sample weighting, including handling attrition and - consult and training on data management, specifically managing the data structure of panel data and preload. Two 'learning by doing' training trips will take place. Trip one: U-M Team to Hart (April2023) involving a SRO data manager and Blaise programmer will travel to Thailand to work with the HART team. <p>Trip two: HART team to U-M to take place between 8 - 29 September 2023 (originally planned for August). This visit will focus on the technical side of field survey management, programming, sampling and weights (including suggestions for sample design enhancements for Wave 5) and data management using HRS and HART as case studies.</p>		
SRO Project Period	01/2024 - 10/2023		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Karl Dinkelmann Jennie Williams Marsha Skoman David Bolt Raphael Nishimura Sarah Broumand		
Other Project Name	HART wave 5		
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	May, 2023 (HART)		Implementing
Risk Level	On Track		
Monthly Updates	April and May - Karl and Jennie visited the HART team and spent five days gathering information about the technical systems, sample design and other issues the team would like SRO assistance with. Current notes are saved here:		

Dates for trip 2 - 8 - 29 September. We have provided some suggestions for accommodation in Ann Arbor and Invitation letters for team members to support Visa applications.

Next steps: Create agenda for the the visit in consultation with the HART Project Manager.

Special Issues				
Cost as of Jun 15, 2023	Total Cost to Date (direct + indirect):			22,529.88
	Est Cost at Completion (E\$AC):			65,930.45
	Total Budget:			71,543.00
	Variance (Total Budget minus- E\$AC):			5,612.55
	Reason for Variance:			Salary hours projected for May were not used - these will be needed in September and will be rolled forward.
Projections as of Jun 15, 2023	Dollars Projected for Month:			10,743.45
	Actual Dollars Used:			3,286.03
	Variance (Projected minus Actual):			7,457.00
	Reason for Variance:			Some travel costs were originally projected in May, all travel costs were charged in April. Hours projected for Karl and Jennie in May were not used (these will be rolled forward to September).
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(HCAP 2022) Healthy Cognitive Aging Project, 2022		
Project Mode	Primary: Face to Face	Secondary: Telephone	
Project Type	Sponsored Projects		
Budget	Direct Budget: 3,300,000.00	Indirect Budget: 1,188,000.00	Total Budget: 4,488,000.00
Principal	Kenneth Langa (SRC)		
Investigator/Clients	David Weir (SRC)		
Funding Agency			
IRB	HUM#: HUM00099822		Period of Approval:
Project Team	Project Lead: Maureen Joan O'Brien		
	Budget Analyst: Richard Warren Krause		
	Production Manager: Margaret Lavanger		
	Senior Project Advisor: Evanthia Leissou		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>This project will involve the completion of a face-to-face CAPI interview, designed to provide a dementia assessment of HRS respondents. A sample of 5000 respondents (one per household) who are 65 years of age or older will be selected for this effort. The questionnaire is a series of 15 cognitive tests and will be administered to respondents after the HRS 2022 interview has been completed. The sample will not be clustered geographically; it will be selected randomly. It is expected that the field team will carry out well-planned regional trips in order to complete the 3,530 in-person interviews. An informant interview will also be completed for each of the respondents interviewed.</p> <p>The respondent questionnaire length is expected to be 60 minutes. The informant questionnaire is expected to be 20 minutes and can be administered in-person after the R interview, or by telephone/mail if FTF is not available.</p>		
SRO Project Period	01/2022 - 12/2023		
Data Col Period	07/2022 - 09/2023		
Security Plan	NA		
Milestones	<div><div><div>Pre Production Start: 04/01/2022</div><div>Pretest End: 05/21/2020</div><div>Staffing Complete:</div><div>SS Train Start: 07/13/2022</div><div>DC Start: 07/18/2022</div></div><div><div>Pretest Start: 05/01/2020</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End: 07/15/2022</div><div>DC End: 10/31/2023</div></div></div>		
Other Project Team Members	PDMG: Tony Romanowski, Lisa VanHavermaet, Megan Hromco, Kristen Cross. TSG: Jeff Smith, Brad Goodwin, Valyn Dall, Peter Sparks, Ashwin Dey, Deb Wilson		
Other Project Name	Harmonized Cognitive Assessment Protocol		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone		
DE Software	Blaise 4.8 BIA		
QC Recording Tool	NA		
Incentive	Yes, R; Yes, INF		
Administration	NA		
Payment Type	Check, prepaid (50); Cash, post (25)		
Payment Method	Check through STrak RPay System		

Report Period	May, 2023 (HCAP 2022)	Implementing
Risk Level	On Track	

Monthly Updates	<p>A small lwer training is scheduled for 6/20-6/22. While we hoped to recruit 8 on-staffers, we were only able to find 4. We believe 4 is still enough to meet project goals, especially given HRS sample will be lower than expected (see below).</p> <p>HCAP production has been underway for 47 weeks. As of this morning, 3,911 interviews have been completed, including 2,111 R and 1,800 Inf. There are currently 212 appts (135 R, 77 Inf). The overall HPI is 4.70. 270 Spanish interviews have been completed (167 R, 119 Inf). There are currently 25 interviewers on staff. We are planning the next sample release for the end of June.</p> <p>Count and RR goals have been updated to reflect 190k in funds to be allocated for the production scenario estimated to result in a 64% RR. This includes the additional lwer training as well as the extension. The original RR goal was 71%. Additionally, HRS is estimating a lower RR so less sample will be available to HCAP. HRS has not yet decided if they will extend data collection or other ways to boost production. HRS expects an ~65% RR if no adaptive strategies are introduced. If some are introduced, the RR might reach 69%. HCAP has assumed an HRS 74% RR when calculating production goals. HCAP goals will be adjusted as HRS is able to determine their</p>
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goals, and we have a clearer picture of the sample that will be available.

We have begun conducting verbal consents with Informants using the new Inf brochure mailings since this new protocol has been IRB approved. This is going well. Rs who have an Inf iw has increased by 2% since this has been implemented, and reports from iwers are that this protocol is efficient.

The HRS Proxy WBD consent in HCAP has been approved. The HRS Proxy sample who are flagged for HCAP and whose Blaise data indicates they are not a Proxy due to cognitive issues, is currently being identified. They will be flagged in Surveytrak. The procedure of the lwer requesting WBD from them will be a manual process with the count is so low and there was no benefit to making additional systems changes in Surveytrak and Blaise at this point. This sample that consents will be passed back to HRS for them to forward to ExamOne to be live scheduled for a WBD appt. The PIs also wish to prioritize black and Hispanic sample, so we are currently working on that.

Special Issues	Production training and production launch were postponed to Summer, 2022 due Covid19 pandemic. We are projecting an overrun due to the inflation over 2-year delay, continued low-level management over this 2 years, increased sample size between 2020 and 2022, and a budget cap in 2020.			
Cost as of Jun 15, 2023	Total Cost to Date (direct + indirect):		3,225,449.84	
	Est Cost at Completion (E\$AC):		4,717,775.76	
	Total Budget:		4,488,000.00	
	Variance (Total Budget minus- E\$AC):		-229,775.76	
	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 Jun 15, 2023	Dollars Projected for Month:		246,733.14	
	Actual Dollars Used:		217,923.46	
	Variance (Projected minus Actual):		28,809.68	
	Reason for Variance:	Respondent costs not used this month, pushed forward, plus low lwr hours - those are pushed forward as well.		
Measures		Units at Complete	RR	HPI
	Current Goal:	3460		4.7
	Goal at Completion:	5536	64%	4.8
	Current Actual:	3469	53%	4.71
	Estimate at Complete:	5536	64%	
	Variance:			
Other Measures	Iw counts include R + Inf. RRs include Rs only. At this point, 83% of Rs have a corresponding Inf iw. We expect ~88% of Rs to have a corresponding Inf iw at the end of data collection.			

Project Name	(Health and Well Being in SE MI) Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan)		
Project Mode	Primary: Face to Face	Total of Modes: 1	
Project Type	Sponsored Projects		
Budget	Direct Budget: 2,409,055.00	Indirect Budget: 1,349,072.00	Total Budget: 3,758,127.00
Principal	Kristine Ajrouch (Life Course Development Program, SRC)		
Investigator/Clients	Toni Antonucchi (Life Course Development Program, SRC)		
	Laura Zahodne (Life Course Development Program, SRC)		
Funding Agency			
IRB	HUM#: HUM00146040	Period of Approval: 4/9/2020	
Project Team	Project Lead: Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Taghreid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 600 interviews with recently identified Arab Americans aged 65 or older residing in Southeast Michigan and 330 interviews with Social Relations sample members aged 65 or older. The Arab American sample will be selected based on an in-person household screening. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements. Social Relations respondents will only complete the cognitive interview. An informant interview will also be conducted for all sample members. Interviews will be conducted in English or Arabic.		
SRO Project Period	05/2019 - 03/2023		
Data Col Period	05/2023 - 03/2024		
Security Plan	No		
Milestones	<div><div>Pre Production Start: 12/01/2022</div><div>Pretest End:</div><div>Staffing Complete: 04/10/2023</div><div>SS Train Start: 05/18/2023</div><div>DC Start: 05/30/2023</div></div> <div><div>Pretest Start:</div><div>Recruitment Start: 02/01/2023</div><div>GIT Start: 05/16/2023</div><div>SS Train End: 05/25/2023</div><div>DC End:</div></div>		
Other Project Team Members	Taghreid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall		
Other Project Name	Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan)		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	DRI-CARI; Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	SRO Group		
Payment Type	Cash, prepaid (\$75 respondent, \$25 informant); Other (\$2 screener incentive)		
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)		

Report Period	May, 2023 (Health and Well Being in SE MI)	Implementing
Risk Level	Some Concerns	
Monthly Updates	<p>During May 2023, SRC activities on the DAWN projects included the following:</p> <p>Task 1: Management, Budget and Work Plan</p> <ul style="list-style-type: none"> • Held meetings with the DAWN research team to discuss study planning, budget, scope and schedule for D-Amp and SRS. • Financial <ul style="list-style-type: none"> o Prepared cost reports and reviewed monthly expenses. o Finalized projections and entered them into the cost reporting system • Technical systems & Questionnaires <ul style="list-style-type: none"> o Continued work to finalize specifications for the main interview, physical measures and cognitive sections. o Conducted repeated rounds of testing on all instruments and on the sample management systems o Updated and formatted Respondent Booklets for Main & Informant o Continued updates to the Arabic informant questionnaire, QxQs and respondent booklet. o Conducted rounds of testing on the screener application. Conducted automated testing on the screener 	

application.

- Training preparation
 - o Finalized study-specific training agenda for team leader training, train-the-trainer, and interviewer training.
 - o Finished writing chapters for interviewer manual. Formatted and assembled sections for laptop loading.
 - o Finalized home study for new hires and published on Canvas.
 - o Finalized powerpoint presentations.
 - o Conducted interviewer training.
- Production preparation
 - o Finalized printing materials and items needed for production.
 - o Packed interviewer duffle bags and kits.
 - o Received and inventoried kits for training.

Task 2: Sampling

- Prepared and delivered sample files
- Provided revised specification for screener
- Provided input for field progress reports and dashboards
- Began preparation of dashboards for production monitoring

Task 3: Questionnaire Development

- See Task 1 for activities completed by the management team
- Conducted repeated rounds of testing on all instruments
- Began work to prepare Arabic specifications for updates
- Updated Arabic QxQs for the Interview Informant questionnaire; updated Informant respondent booklet

Task 4: CAI Programming

- Continued bug and format fixes on the screener instrument (English & Arabic)
- Updated programming in all sections of the Main interview, conducted repeated rounds testing and bug fixes
- Integrated electronic consent forms and receipts

Task 5: Systems Programming

- Continued programming updates to the SurveyTrak screener project to allow it to create sample lines for both D-Amp and SRS.
- Continued programming changes to SurveyTrak Main D-Amp project for proper creation/loading of informant information.
- Conducted continued rounds of testing/bug fixes to all sample management instruments
- Began preparation of systems for quality control
- Worked to resolve recording issues
- Loaded and delivered laptops for training

Tasks 6, 7: Interviewer Recruitment & Hiring, Training

- Facilities
 - o Set up training rooms; provided on-site management and coordination
- Interviewer recruitment for May
 - o Processed hiring paperwork for all new hires for May training
- Interviewer recruitment for July
 - o Updated posting paperwork
 - o Evaluated applications, conducted 1st, 2nd interviews for interviewer positions; conducted bilingual certification interviews
- Attended hiring fairs, posted flyers and updated advertisements
- Made offers to selected candidates, processed hiring paperwork and requested background checks.
- Training
 - o Finalize plans for interviewer and team leader training
 - o Prepared and shipped home study materials for team leaders
 - o Prepared training materials for interviewers, published home study
 - o Conducted interviewer training from May 15 through May 25.
 - ? General interviewing techniques held May 15 and 16
 - ? Study Specific May 16 (afternoon) through May 25
 - ? 23 interviewers expected at training, 19 attended (2 drops during training), 15 fully certified, 2 certified for screening only (numbers include 4 bilinguals)

Task 8: Main Data Collection

- Obtained imprest cash for prenotification letters. Prepared mailing and shipped prenotification letters on May 25.
- Prepared bulk supplies for interviewers, handed out bulk supplies after certification.
- Production screening began May 30; production interviewing began June 1 (delayed due to pending IRB approval)
- Through May 31:
 - o 25 completed screening interviews, with 0 eligible for D-AMP, 22 eligible for SRS
 - o 0 production interviews (awaiting IRB approval)
 - o First interview scheduled for June 2, 2022

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

- Production is proceeding much more slowly than had been anticipated. Many interviewers are not working the required number of hours for various reasons. As of 6/18/2023, only 2 main interviews and one informant interview had been completed.
- DMSS requested a change to the programming for the screening instrument on May 12. This will require revamping the screener programming and significant testing -- an added, unanticipated expense to the project. About 100 sample lines are being held back from production launch until this change can be made.
- The project is experiencing significant attrition before, during training, and before production starts. 28 interviewers were hired. 17 interviewers completed training with 15 fully certified and 2 screeners. One interviewer resigned between the end of training and the start of production interviewing.
- Preparation of all instruments is running severely behind schedule. The project will launch without full functionality in production monitoring programs. This is because of both a lack of capacity to prepare specifications and a lack of capacity in programming resources.
- The project continues to experience issues with technical systems leading to unanticipated programming costs.

• Financial:

o SRO is carefully monitoring programming progress and cost. Some line items currently have slack that will be able to absorb modest overruns on other line items.

? Blaise programming will be higher than budgeted due to the complexity of launching the electronic consent forms, addition of the consent process programming, and changes to the questionnaire which involved re-working a majority of the skip patterns and respondent booklet references.

? SurveyTrak programming will be higher than budgeted due to the unexpected complexity of the screener project programming, which generates sample lines for two studies. It has also been more difficult than anticipated to resurrect programming from 2019/2020 and update to the most current version of SurveyTrak.

• Interviewer Attrition

o The project hired 28 interviewers for the May training, but is experiencing substantial attrition prior to and during training. This level of attrition is similar to that being experienced by other SRO projects and also by other survey research firms. Reasons for attrition include finding full-time employment with benefits, family or personal emergencies, or unexplained drops. 15 interviewers were fully certified, and 2 were certified for screening only. One interviewer resigned before production started on May 30, leaving 14 certified interviewers with two screening interviewers.

• Schedule

o Programming is running behind schedule due to issues noted above.

? Priority is being given to launching the screener (English & Arabic), and the main survey, physical measures and cognition sections in English, as well as the informant questionnaire in English. 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.

Cost as of Jun 15, 2023	Total Cost to Date (direct + indirect):	1,327,297.25
	Est Cost at Completion (E\$AC):	3,752,849.27
	Total Budget:	3,758,127.00
	Variance (Total Budget minus- E\$AC):	5,277.73
	Reason for Variance:	The variance is minor given the early stage of production. It is as yet too early to project full production costs (only 3 interviews completed as of 6/19/2023), however we do expect the variance to disappear given increasing travel and other costs.
Projections as of Jun 15, 2023	Dollars Projected for Month:	138,467.61
	Actual Dollars Used:	105,822.73
	Variance (Projected minus Actual):	32,644.88
	Reason for Variance:	The monthly variance can be attributed to the late start of quality control efforts (surveytech hours were not charged as anticipated). Training travel costs were projected but did not get expensed during May. There was some late invoicing for supplies and materials.

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: 6/7/2023-6/6/2024	
Project Team	Project Lead: Evanthia Leissou		
	Budget Analyst: Richard Warren Krause		
	Production Manager: Andrea Sims		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Deborah Zivan		
	Production Manager 2: Jennifer C Arrieta		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.		
SRO Project Period	01/2021 - 09/2023		
Data Col Period	03/2022 - 07/2023		
Security Plan	NA		
Milestones	<div>Pre Production Start: 01/01/2021Pretest Start: 11/01/2021Pretest End: 11/23/2021Recruitment Start: 08/01/2021Staffing Complete: 01/15/2022GIT Start: 02/21/2021SS Train Start: 02/23/2022SS Train End: 03/03/2022DC Start: 03/07/2022DC End: 06/30/2024</div>		
Other Project Team Members	<div>Derek Dubuque (Production Manager), Theresa Camello (Production Manager), Alex Warju (Production Manager), Milagros Hierro (Production Manager), Deborah Zivan (Project Manager), Andrew Hupp (Project Manager), Gary Hein (Project Manager), Erin McSpadden (Project Manager), Daniah Buageila (Project Manager), Janet McBride (Project Assistant), Paul Burton (Stats/Sampling), Vanessa Clarke (Project Assistant), Jeannie Baker (Project Manager), Melissa Luker (Project Assistant), Anthony Romanowski (Project Manager), Megan Hromco (Project Assistant), Kristen Cross (Project Assistant), Austin De Spirito (Project Assistant), Cindy Huang (Budget Analyst)</div> <div>Tech Team: Karl Dinkelmann, Jeff Smith, Jim Rodgers, Laura Yoder, Marsha Skoman, Ashwin Dey, Pam Swanson, David Bolt, Deb Wilson, Jennie Williams, Rose Zybdel, Stephanie Windisch, Holly Ackerman, Shane Empie, Kelly Chatain, Brianna Sabol</div> <div>Coding Lead: Carolyn Vieira-Martinez</div>		
Other Project Name	HRS 2022 Main lws		
Sample Mgmt System	SurveyTrak; MSMS		
Data Col Tool	Blaise 5; SAQ		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Blaise 5 Coding Application); External vendor (DataForce)		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	NA		
Payment Type	Check, prepaid (\$80 (Panel)); Check, post (\$50 (WBD)); Cash, post (\$20 (SAQ), \$100 (Baselines))		
Payment Method	Check through STrak RPay System; Check through other system (Rpay system set up for MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (Rpay system set up for MSMS); Imprest Cash Fund from ISR Business Office (Rpay system set up for MSMS)		
Report Period	May, 2023 (HRS 2022 Panel & Baselines)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Throughout the month of May, - The project team has been working on production monitoring, cost monitoring, sample management, logging, weekly mailings (SSA and SAQ), payment and letter request processing, and the six-year renewal proposal. - April trainees were trained via webinars on conducting panel interviews. Once trained, they were assigned panel		

sample.

- On 5/24/23, the field staff was given the directive to make at least 2 to 3 attempts per week on priority panel sample, at least 1 attempt per week on non-priority panel sample, reducing screening efforts to one call window per week.
- DMSS made updates to reports.
- Limited effort protocol continues with minimal impact to the field staff (993 SIDs pulled from field as of 6/19/23).
- Priority/Increased token flagging of Panel and EgenX sample and non-priority Panel eFTF mode switch protocols continued. As of 6/19/23, 26% of the 3,008 high priority cases have completed an interview; 12% of the 1,615 Panel eFTF mode switch cases have completed an interview.

*As of 6/19/23, the "measures" table reflects both Panel and Baseline interviews combined. Goals are in process of being updated in order to discuss with HRS Exec the potential of extending panel through August 2023. The #s noted for current goals are as of 6/19/23.

Special Issues	<div>- 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 the client on responsive design options and realistic panel response rate expectations, as well working with the field staff on sample management strategies. As of 6/19/23, we still need almost 2,697 panel interviews to the reach a 74% RR goal.</div> <div>- Multiple Blaise issues that have impacted STrak and MSMS throughout data collection.</div> <div>- Competing project team demands with HRS 2022 in data collection at the same time as 2023 mail surveys and HRS 2024 preproduction.</div>			
Cost as of Jun 15, 2023	Total Cost to Date (direct + indirect):		15,388,304.57	
	Est Cost at Completion (E\$AC):		18,547,094.71	
	Total Budget:		19,016,630.00	
	Variance (Total Budget minus- E\$AC):		469,535.29	
	Reason for Variance:		The change in variance between April and May cost reports is due to Panel interviewer hours coming under projections (38% or 3,872 hours) in the month of May. Projections are being updated as this variance is not an accurate reflection of estimated cost at complete. Summary for the wave: CRS is projecting the contingent fringe benefits with the newly approved 10.4% rate to accommodate ACA costs, the \$400 signing bonus for field staff, Field interviewer and SurveyTech base rate increase, an extra day added to February production training, the increase in per mile reimbursement for travel. CRS is now using the actual lwer rates for projecting lwer costs and travel projections were removed from the recruitment task. The Casic recharge rate and Field Ops rate increases, increased mileage costs for remaining interviews, the Field lwer and SurveyTech rate increases have been updated in CRS, the increase in recharges to the lwer-Trainee hours as well as the reduction in the CAPI rate. The additional interviewer hours needed to reach panel interview goals have been applied to CRS.	
Projections as of Jun 15, 2023	Dollars Projected for Month:		801,168.85	
	Actual Dollars Used:		520,412.30	
	Variance (Projected minus Actual):		280,756.55	
	Reason for Variance:		The primary reason for variance was that interviewer were significantly less than what had been projected for the month. Staff hours and non-salary costs for respondent payments, travel, and training were also under projections. Future projections are in process of being updated.	
Measures		Units at Complete	RR	HPI
	Current Goal:	14,547	52%	10.3
	Goal at Completion:	22,661	62%	8.2
	Current Actual:	14,548	52.7%	10.3
	Estimate at Complete:	22,661	62%	11.7
	Variance:	0	0	3.5
Other Measures	Panel: Goal RR: 74%, Current RR: 61.3% (Panel end date 7/29/23) 2022 Baselines generated from screener: Goal RR: 44%, Current RR: 19.1% 2019 EGenX baselines: Goal RR: 70%, Current RR: 63.9%			

Project Name	(HRS 2024) Health and Retirement Study 2024		
Project Mode	Primary: Mixed Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	Direct Budget: 603,986.00	Indirect Budget: 217,435.00	Total Budget: 821,421.00
Principal Investigator/Clients	David Weir (ISR-SRC)		
Funding Agency			
IRB	HUM#: HUM000611128	Period of Approval: 6/7/2023-6/6/2024	
Project Team	Project Lead: Evanthia Leissou		
	Budget Analyst: Richard Warren Krause		
	Production Manager: Andrea Sims		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Derek Dubuque		
	Production Manager 2: Jennifer C Arrieta		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.		
SRO Project Period	05/2023 - 08/2025		
Data Col Period	03/2024 - 04/2025		
Security Plan	NA		
Milestones	<div>Pre Production Start: 05/15/2023</div> <div>Pretest End: 11/25/2023</div> <div>Staffing Complete:</div> <div>SS Train Start: 02/24/2024</div> <div>DC Start: 03/04/2024</div> <div>Pretest Start: 11/09/2023</div> <div>Recruitment Start:</div> <div>GIT Start: 02/22/2024</div> <div>SS Train End: 02/29/2024</div> <div>DC End: 05/03/2025</div>		
Other Project Team Members	Deborah Zivan (Project Manager), Gary Hein (Project Manager), Erin McSpadden (Project Manager), Daniah Buageila (Project Manager), Janet McBride (Project Assistant), Paul Burton (Stats/Sampling), Vanessa Clarke (Project Assistant), Jeannie Baker (Project Manager), Melissa Luker (Project Assistant), Anthony Romanowski (Project Manager), Megan Hromco (Project Assistant), Austin De Spirito (Project Assistant), Cindy Huang (Budget Analyst)		
	Tech Team: Karl Dinkelmann, Jeff Smith, Jim Rodgers, Laura Yoder, Marsha Skoman, Ashwin Dey, Pam Swanson, David Bolt, Deb Wilson, Jennie Williams, Rose Zybdel, Stephanie Windisch, Holly Ackerman, Shane Empie, Kelly Chatain, Brianna Sabol		
Other Project Name	HRS 2024 Panel		
Sample Mgmt System	SurveyTrak; MSMS		
Data Col Tool	Blaise 5; SAQ		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Blaise 5 Coding Application); External vendor (DataForce)		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	NA		
Payment Type	Check, prepaid (100.00); Check, post (\$50 (WBD), \$20 (SAQ))		
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office		
Report Period	May, 2023 (HRS 2024)		Initiation
Risk Level	On Track		
Monthly Updates	HRS 2024 preproduction began in May with focus on securing SRO staff resources (TSG, PDMG, etc), cost projections, and technical development.		
	*Milestone dates are tentative.		
Special Issues	Resource (Regular and Field Staff) concerns for HRS 2024 preproduction and production while HRS 2022 data collection and HRS mail surveys are in production. Session database issues needing to be addressed/resolved by CBS for HRS 2024.		

Cost as of Jun 15, 2023	Total Cost to Date (direct + indirect):			4,620.89
	Est Cost at Completion (E\$AC):			820,912.57
	Total Budget:			821,421.00
	Variance (Total Budget minus- E\$AC):			508.43
	Reason for Variance:			Minimal variance. The HRS 2024 budget is for preproduction efforts through December 2023. Will update the total budget once the 6 year renewal proposal is reviewed/approved/awarded.
Projections as of Jun 15, 2023	Dollars Projected for Month:			7,982.64
	Actual Dollars Used:			4,620.89
	Variance (Projected minus Actual):			3,361.75
	Reason for Variance:			Variance due to fewer staff hours than originally projected primarily due to staff ooto time. Future projections have been adjusted.
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(HRS HOC) Health and Retirement Study – Historical Occupation Coding		
Project Mode	Primary: Data Processing		
Project Type	Sponsored Projects		
Budget	Direct Budget: 67,762.90	Indirect Budget: 24,394.16	Total Budget: 92,157.06
Principal	David Weir (SRC)		
Investigator/Clients	Amanda Sonnega (SRC)		
Funding Agency	NIA		
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Gloria J Baker		
	Budget Analyst: Cindy Tsao		
	Production Manager: Carolyn Vieira-Martinez		
	Senior Project Advisor: Jennifer C Arrieta		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	HRS Staff will provide SRO with the text description of approximately 10,000 occupations reported in interviews completed during 1994-2002 waves of data collection. The Survey Services Laboratory (SSL) will complete a crosswalk between the 1980 and 2010 occupation census codes as well ass occupation re-coding for jobs reported during the 1994-2002 waves of HRS data collection, using 2010 Census codes. Coding for these occupations was completed in the past using 1980 Census codes.		
SRO Project Period	09/2022 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div><div>Pre Production Start:</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start:</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End:</div></div>		
Other Project Team Members			
Other Project Name	HRS Historical Coding		
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	Desktop		
DE Software	Other (Coding Application)		
QC Recording Tool	NA		
Incentive	Not used		
Administration	N/A		
Payment Type	N/A		
Payment Method	N/A		

Report Period	May, 2023 (HRS HOC)		Planning
Risk Level	On Track		
Monthly Updates	During the month of May, - Jeannie participated in and scheduled meetings with the PI and budget analyst. - Project is moving forward, but HRS staff is experiencing some delays setting up variable tables for historic data. This will likely push back SSL coding activities to September 2023.		
Special Issues	- Delay of original coding work scope to now begin in September 2023. - PI with the most coding experience/knowledge left the organization shortly after start of project - SRO's staff member with the most HRS coding experience/knowledge informed project team in mid-January that he will be retiring the first week of February allowing for a very short transition of knowledge to the newly assigned coding lead.		
Cost as of Jun 15, 2023	Total Cost to Date (direct + indirect):		19,214.82
	Est Cost at Completion (E\$AC):		85,543.16
	Total Budget:		92,157.06
	Variance (Total Budget minus- E\$AC):		6,613.90
	Reason for Variance: Variance is due salary as a result of moving Stan Hasper's hours to Carolyn Vieira-Martinez and fewer project management hours needed		

for coordinating with HRS staff during the planning phase. The difference in variance between April and May's reports was due to cost projections not having been updated in CRS by the time the April MPR was due.

Projections as of Jun 15, 2023	Dollars Projected for Month:	1,350.40
	Actual Dollars Used:	503.67
	Variance (Projected minus Actual):	846.73

Reason for Variance: Not as much project management that was projected has been needed at this point in the planning phase. Due to initial project delay and further delay with HRS (ISR) staff, coding hours have not been utilized. Coding to begin in Sept 2023 so unused hours for project management, system set up, and coding will be pushed forward.

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

Other Measures

Project Name	(HRS2022-Screening) HRS 2022 - Screening		
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 21,264,149.00	Indirect Budget: 7,655,093.00	Total Budget: 28,919,242.00
Principal Investigator/Clients	David Weir (SRC) Helen Levy (SRC) Ken Langa (SRC)		
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Evanthia Leissou Budget Analyst: Richard Warren Krause Production Manager: Senior Project Advisor: Nicole G Kirgis Production Manager 1: Andrew L Hupp Production Manager 2: Theresa Camelo		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample.		
SRO Project Period	02/2021 - 01/2024		
Data Col Period	03/2022 - 01/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: 04/19/2022 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	SurveyTrak; MSMS; Other ((Blaise) Case Management App (CMA))		
Data Col Tool	Blaise 5		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Blaise 5 web instrument); N/A		
QC Recording Tool	Camtasia; N/A		
Incentive	Yes, R; Yes, INF		
Administration	SRO Group		
Payment Type	Check, post; Cash, prepaid (\$2); Cash, post		
Payment Method	Check through STak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office		

Report Period	May, 2023 (HRS2022-Screening)		Implementing
Risk Level	Some Concerns		
Monthly Updates	<p>All of the Batch 4 sample is in the field. Implementation of the endgame strategy is on hold for the moment. The focus of the majority of time for most staff is on completing the panel. Panel work may be extended through August which will slow screening considerably until the fall. There is a group of endgame cases (safety, work permit, and limited access) we may release before then that will not receive any interviewer follow-up. We have begun returning cases to the field for additional effort to either be completed or reach the eligibility for the endgame strategy. We have also returned some endgame cases in a few areas to keep screening staff with sample.</p> <p>We have been hitting the production goals for several weeks now. We've lowered the goals given the reduction in screening hours and are currently still meeting the goals.</p> <p>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. After a discussion with the sampling team and the PIs we will be sorting addresses (and possibly listing) ~350 segments in the reserve sample. We will do that work later in the fall.</p>		

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

Special Issues		
Cost as of Jun 15, 2023	Total Cost to Date (direct + indirect):	11,705,129.45
	Est Cost at Completion (E\$AC):	26,172,340.58
	Total Budget:	28,919,242.00
	Variance (Total Budget minus- E\$AC):	2,746,901.42
	Reason for Variance:	Projections are in the process of being updated.
Projections as of Jun 15, 2023	Dollars Projected for Month:	2,042,060.63
	Actual Dollars Used:	1,356,751.99
	Variance (Projected minus Actual):	685,308.64
	Reason for Variance:	The largest contributors to the variance were the April training costs have not hit yet, and spending less in unused respondent payments. These costs were pushed forward.

Measures		Units at Complete	RR	HPI
	Current Goal:	3,600/1,500 HHs	73%	3.0
	Goal at Completion:			
	Current Actual:	1,830/1,941	39.6%	4.22
	Estimate at Complete:			
	Variance:			

Other Measures

Project Name	(IHDS3) India Human Development Survey Wave 3		
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 358,900.61	Indirect Budget: 200,983.92	Total Budget: 559,884.53
Principal Investigator/Clients	Sonalde Desai (University of Maryland)		
	Stephanie Chardoul (University of Michigan)		
	Santanu Pramanik (National Council of Applied Economic Research)		
Funding Agency	National Institutes of Health, Department of Health and Human Services		
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Sarah Elisa Broumand		
	Budget Analyst: Ryan Neice		
	Production Manager:		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Sarah Elisa Broumand		
	Production Manager 2: Sarah Elisa Broumand		
Proposal #	no data		
Description	The India Human Development Survey (IHDS) is a nationally representative, multi-topic, longitudinal survey of 41,554 households in 1503 villages and 971 urban neighborhoods across India. The first round of interviews were completed in 2004-5; data are publicly available through ICPSR. A second round of IHDS reinterviewed most of these households in 2011-12 (N=42,152). SRC joins IHDS Wave 3 to automate data collection, the scope of work includes methodological design, sample design, questionnaire design, technical instrument design, supervisor/interviewer training, production monitoring, quality control, data dissemination, and 2-3 weekly conference calls for capacity building.		
SRO Project Period	01/2019 - 03/2024		
Data Col Period	05/2022 - 10/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Project Management Team Stephanie Chardoul -- Senior Project Advisor (SPA) Sarah Broumand - Project Manager Programming Team Collette Keyser - Blaise Marsha Skoman - SurveyTrak Holly Ackerman - WebTrak Cheng Zhou - Sync HelpDesk Team Emmanuel Ellis John Data Manager Team Sarah E Jennie		
Other Project Name			
Sample Mgmt System	Other (SurveyTrak INTL)		
Data Col Tool	Blaise 5		
Hardware	Laptop; Other (NCAER Phone (In India))		
DE Software	Other (TBD)		
QC Recording Tool	DRI-CARI		
Incentive	Yes, Other (TBD)		
Administration	Other (TBD)		
Payment Type	Other (TBD)		
Payment Method	Other (TBD)		

Report Period	May, 2023 (IHDS3)		Implementing

Risk Level	Some Concerns			
Monthly Updates	<p>This is the final month for this contract period. New contract period starts in May and ends in November. Unfortunately, there were several factors that caused us to overrun this project:</p> <ol style="list-style-type: none"> 1. The Migrant ST project with automated preload was developed (out of scope) 2. The CARI player developed (out of scope) 3. COVID delays 4. Unsuccessful translation plan to use BTT required numerous SRO hours to be used in November and December to make production schedule. 5. Re-development of ALL Blaise instruments that changed substantially after initial coding prior to COVID. <p>New funding is expected to cover unforeseeable issues as well as any additional Blaise and ST work.</p>			
Special Issues				
Cost as of Jun 15, 2023	Total Cost to Date (direct + indirect):	578,070.12		
	Est Cost at Completion (E\$AC):	578,070.12		
	Total Budget:	559,884.53		
	Variance (Total Budget minus- E\$AC):	-18,185.59		
	Reason for Variance:	Unable to perform all the unexpected tasks such as fixing data models in the last few months of this contract period.		
Projections as of Jun 15, 2023	Dollars Projected for Month:	9,097.80		
	Actual Dollars Used:	9,124.71		
	Variance (Projected minus Actual):	-26.91		
	Reason for Variance:	very small variance		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(LHMS 2023 Spring) Life History Mail Study Spring 2023		
Project Mode	Primary: Mail	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 293,540.00	Indirect Budget: 164,382.00	Total Budget: 457,922.00
Principal	David Weir (SRC)		
Investigator/Clients	Jaqui Smith (SRC)		
Funding Agency	NIH		
IRB	HUM#: HUM00229404		Period of Approval:
Project Team	Project Lead: Gary Hein		
	Budget Analyst: Cindy Tsao		
	Production Manager: William Keating		
	Senior Project Advisor: Evanthis Leissou		
	Production Manager 1: Deborah Zivan		
	Production Manager 2: William Keating		
Proposal #	no data		
Description	<p>The HRS Life History Mail Survey (LHMS) is part of the Health and Retirement Study. The goal of LHMS is to collect retrospective life histories of HRS participants to address multidisciplinary need for information about events, residential location, and education over the entire life course. Information like this allows researchers to understand how individuals' pasts shape their health and economic situations today.</p> <p>A paper questionnaire will be mailed to a sample of approximately 2,288 HRS Respondents. From this sample, approximately 1,242 completed surveys are expected (54% response rate). For the reminder protocol, 495 respondents have been designated to receive a reminder by postcard. The other 1,793 respondents will receive reminders by phone to complete the questionnaire. When a respondent is reached by phone, SRO will attempt to complete the 60-minute interview by telephone. Thank you postcards will be mailed to respondents who return a completed questionnaire.</p>		
SRO Project Period	04/2023 - 12/2023		
Data Col Period	06/2023 - 09/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 04/01/2023 Pretest End: Staffing Complete: SS Train Start: 07/11/2023 DC Start: 06/23/2023 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: 07/11/2023 DC End: </div> </div>		
Other Project Team Members	Gary Hein/Debbie Zivan: Project Leads Cindy Tsao: Budget Analyst Vanessa Clarke: Project Assistant Carolyn Viera Martinez: Coding Lead		
Other Project Name	LHMS Spring		
Sample Mgmt System	SMS		
Data Col Tool	SAQ; Other (Blaise SMS)		
Hardware	Desktop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Check, prepaid (\$25)		
Payment Method	Check through STrak RPay System		

Report Period	May, 2023 (LHMS 2023 Spring)		Initiation
Risk Level	On Track		
Monthly Updates	- Created Weblog/Webtrak test projects - Created and QC'd sample file - Created and submitted amendment to LHMS for the 2023 Spring effort - Checks ordered and delivered to Dataforce - Updated SAQ cover spec - Attended SRO pre-production meetings (reminder calling, technical systems setup, and dataforce) Mailing date: 6/23 Reminder calling begins: 7/12		

Special Issues	Some Respondents in the LHMS spring sample are currently being contacted to complete the HRS 2022 interview. There will be a short turn around time for these respondents between being invited to the LHMS spring survey and the CAMS survey in the fall.			
Cost as of Jun 15, 2023	Total Cost to Date (direct + indirect):	86,829.15		
	Est Cost at Completion (E\$AC):	392,817.25		
	Total Budget:	457,922.00		
	Variance (Total Budget minus- E\$AC):	65,104.75		
	Reason for Variance:	Actual sample of 1955 is lower than budgeted sample of 2288, resulting in generally lower costs across all resources.		
Projections as of Jun 15, 2023	Dollars Projected for Month:	3,041.25		
	Actual Dollars Used:	3,041.25		
	Variance (Projected minus Actual):	0.00		
	Reason for Variance:	No variance due to timing of when projections were entered into CRS.		
Measures		Units at Complete	RR	HPI
	Current Goal:	1242	54.3%	
	Goal at Completion:	1242	54.3%	
	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: Timothy Prand Budget Analyst: William Lokers Production Manager: Ruth B Philippou Senior Project Advisor: Nicole G Kirgis Production Manager 1: Lisa J Carn Production Manager 2:		
Proposal #	no data		
Description	<p>MI CReSS is a partnership between the University of Michigan School of Public Health (SPH) and the Michigan Department of Health and Human Services. It is a public health surveillance study to learn about Michiganders' experiences with COVID-19 using a representative sample of confirmed cases within the state. Using survey data, they plan to document sociodemographic inequities in COVID-19 testing, treatment, and recovery.</p> <p>SRO's involvement includes the administration of a Follow-up survey for respondents that completed a Baseline survey with the SPH team. Based on the sample information provided, we will be re-contacting approximately 3,995 respondents who have already completed (or are estimated) to complete the Baseline survey to administer the Follow-up survey.</p> <p>The Follow-up survey is estimated to be 45 minutes in length, and Respondents will be encouraged to complete the survey by web. However, SRO Interviewers will contact non-responders and conduct the interview over the telephone if the Respondents do not want to complete the survey on the web.</p>		
SRO Project Period	08/2021 - 09/2023		
Data Col Period	01/2022 - 07/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: 11/29/2021 DC Start: 01/26/2022 </div> <div> Pretest Start: Recruitment Start: 09/16/2021 GIT Start: SS Train End: 12/02/2021 DC End: 07/07/2023 </div> </div>		
Other Project Team Members	Bill Lokers: Financial Analyst Megan Hromco: Production Assistant Hueichun Peng: Technical Lead / WSMS db Programmer Peter Sparks: CAI Programmer (Blaise 5) Cheng Zhou: Web Component, ADT, Reports LihShwu Ke: DBA Architecture & Data Security Sarah Broumand: Data Manager Deb Wilson: Help Desk		
Other Project Name			
Sample Mgmt System	Web SMS		
Data Col Tool	Blaise 5		
Hardware	Laptop; Desktop		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Check, post (\$25)		
Payment Method	NA		
Report Period	May, 2023 (MI CReSS (Year 3))		Implementing
Risk Level	On Track		
Monthly Updates	Sample replicate 15 was released as planned. Release 11 reached 80% response rate (goal) 11 days early. We think this is due to adjusting the sorting of sample to call it more efficiently. This month was also spent doing pre-		

production work and planning for Follow on cohort 2 sample that starts production in July. New project manager Tim Prand transitioning to new role. Lisa Carn also transitioning to new Production Manager role.

Recruiting and Training was planned and programmed for July.

Special Issues

Cost as of Jun 15, 2023	Total Cost to Date (direct + indirect):	349,157.76
	Est Cost at Completion (E\$AC):	745,286.93
	Total Budget:	841,375.00
	Variance (Total Budget minus- E\$AC):	96,088.07
	Reason for Variance:	New funding was just added and still need to work with financial analyst to balance out the hours.

Projections as of Jun 15, 2023	Dollars Projected for Month:	90,497.04
	Actual Dollars Used:	51,768.81
	Variance (Projected minus Actual):	38,728.23
	Reason for Variance:	Programming and Project Management hours could not be spent due to other project immediate needs.

Measures		Units at Complete	RR	HPI
	Current Goal:	5,142 (Rel 1-16)	80% (60%-Web/40%Tel)	2.25
	Goal at Completion:		80% (60%-Web/40%Tel)	
	Current Actual:	3,927	71% (71%-Web/29% Tel)	4.76
	Estimate at Complete:			
	Variance:			

Other Measures

Project Name	(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027		
Project Mode	Primary: Class SAQ Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 6,267,988.00	Indirect Budget: 3,510,072.00	Total Budget: 9,778,060.00
Principal	Richard Miech (SRC)		
Investigator/Clients			
Funding Agency	National Institute on Drug Abuse, one of the National Institutes of Health.		
IRB	HUM#: 00217920	Period of Approval: from 7/20/22 No CR	
Project Team	Project Lead: Rebecca Gatward Budget Analyst: Dean E Stevens Production Manager: Margaret Lavanger Senior Project Advisor: Gregg Peterson Production Manager 1: James Koopman Production Manager 2:		
Proposal #	no data		
Description	<p>Since 1975 the MTF survey has measured drug and alcohol use and related attitudes among adolescent students nationwide. A nationally representative sample of survey participants report their drug use behaviors across three time periods: lifetime, past year, and past month. The survey is funded by the NIDA, a component of the National Institutes of Health (NIH), and conducted by the University of Michigan.</p> <p>It is based on two interconnected series of surveys using nationally representative samples:</p> <p>(a) self-administered annual in-school surveys of 8th, 10th, and 12th graders (~45,000) in 400 schools. Proctors (SRO interviewers) coordinate and administer the data collection in schools (either FTF or remotely without visiting the schools).</p> <p>(b) panels of high school graduates aged 19-30, 35, 40,45, 50, 55, and 60 (now primarily surveyed by web). Panel members aged 19-30 are invited to participate every other year/asked to complete a web survey and the older sample members are sent questionnaires (mail and web) at five-year interval. The MTF panel study has three parts - early in the year a newsletter is mailed to panel members. If the newsletter is returned (undelivered) locating effort targets these panel members and others who have not participated for X years. The web panel launches (web) in spring and in around June a telephone non-response effort begins for those invited to participate. The panel members are recruited from the 12th graders who participate in the base year study.</p> <p>Press releases and published results can be found here.. http://www.monitoringthefuture.org/</p>		
SRO Project Period	04/2022 - 03/2027		
Data Col Period	04/2022 - 03/2027		
Security Plan	Yes		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Hueichun Peng Technical Lead (WebSMS programmer) Brad Goodwin (+Ed Green) Data Management Ashwin Dey SurveyTrak, WebTrak and MTF specific Apps. Programmer Deborah Wilson and Brendon Carroll Help Desk/Tablet support		
Other Project Name			
Sample Mgmt System	SurveyTrak; Web SMS; Illume		
Data Col Tool	Illume		
Hardware	Laptop; Tablet; [UM cell] Phone		
DE Software	Illume		
QC Recording Tool	N/A		
Incentive	Yes, Other (Honorarium paid to school by MTF Research staff)		
Administration	ISR Group		
Payment Type	NA		
Payment Method	Check through other system		
<hr/>			
Report Period	May, 2023 (MTF Base Year 2022_27)		Implementing
Risk Level	On Track		
Monthly Updates	May 2023 - The final school survey was conducted on 6/5. MTF was administered in 248 schools and 24,096 students completed the survey - RR 82%. Schools were fairly equally distributed by grade). Interviewers visited 227 of these		

schools to proctor in person (92%). Surveys in the remaining schools (n=21) were coordinated by the interviewer without visiting the school. Of the schools passed to SRO, 38 were later coded as a refusal or non-sample for another reason, this is slightly higher than last year (12% compared with 10%). Refusals are assigned by the MTF research team and the refusal is usually passive (Interviewer is not able to make contact) or via email from the school contact person. The SRO interviewers are not generally involved in following up with schools once they have sent an email refusing participation.

- The number of recruited schools passed to SRO interviewers to conduct the survey administration protocol is lower than in previous years (286 compared to 349 in 2022 - in 2019 the number of schools was closer to 400). Recruiters are finding it much more difficult to recruit and then complete all the administrative steps they need to before the school is passed to interviewers. Interviewers are being asked to make FTF visits (and other contact attempts) to help gather the details they need to. This year the callers and interviewers have made FTF visits to schools in order to recruit the schools (the process that begins during the later summer in the previous year). We expect that SRO interviewers will be asked to help with FTF recruitment in September/October in preparation for the 2024 wave.

Special Issues	Background below. Update 6/19 - the perpetual license agreement has been signed and the license updated (current license expired on May 31st). MTF surveys will transition to Qualtrics from 2024 data collection waves. We have an agreed plan and work has begun (by the MTF Research team) to program the surveys in Qualtrics.			
Cost as of Jun 15, 2023	Total Cost to Date (direct + indirect):			1,492,124.82
	Est Cost at Completion (E\$AC):			7,071,060.78
	Total Budget:			9,778,060.00
	Variance (Total Budget minus- E\$AC):			2,706,999.22
	Reason for Variance:			<p>Current projections result in a large underspend for the five year grant period.</p> <p>A client report (with notes) is provided to Nicholas Prieur every month so the MTF research staff are aware of projected cost to complete. In April I provided Nick with more details about interviewer costs and assumptions used for projections. The amount provided to SRO will probably decrease for future years to reflect the current scope of work (i.e. surveys completed in less schools and using the post pandemic protocols). I have adjusted the projections for 2024 onwards based on completing survey administrations in 325 schools (number was agreed with Nick) - rather than 400. This increases the underspend.</p> <p>*****</p> <p>Not changed since last month (January) - left for info.</p> <p>Projections for the five year period are based on current scope of work and the adapted protocol (introduced in 2021). The budget prepared for the proposal was based on the pre-pandemic design. The adapted protocol brings savings in the following categories: interviewer hours, travel, shipping and staff time (specifically hours required for loading and preparing tablets for shipping). For the past few years the number of schools recruited and passed to SRO has been lower than the number on which the budget is based (n=390), we have continued to base projections on achieving survey administrations in 390 schools. Wave 1 (2023)</p> <p>- We have increased staff time (marginally) to prepare for the small pilot (six schools) to test methods to increase cooperation from 12th grade students to provide contact details.</p> <p>We may also add some hours and expenses for FTF school recruitment trips that SRO has been asked to help with (given the lower response than is usual at this point, it is hoped that FTF visits may boost recruitment).</p>
Projections as of Jun 15, 2023	Dollars Projected for Month:			177,266.16
	Actual Dollars Used:			162,775.50
	Variance (Projected minus Actual):			14,490.66
	Reason for Variance:			<p>Projected and actual salary hours were fairly close for May, the majority of the variance was caused by non-salary costs (specifically the Illume survey costs - there is a delay to this being charged/assigned and travel costs).</p>
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 2,496,935.00	Indirect Budget: 1,398,282.00	Total Budget: 3,895,217.00
Principal	John Schulenberg (UM-SRC)		
Investigator/Clients	Megan Patrick (UM-SRC)		
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Donnalee Ann Grey-Farquharson		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lloyd Fate Hemingway		
	Senior Project Advisor: Rebecca Gatward		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	This project is a continuation of MTF Illume Web 2021. PI staff will edit and test 12 survey versions, all previously programmed in Illume by SRO. SRO will further test the surveys as part of the systems integration process. All 12 surveys will be launched in 2021. After testing is complete, SRO will launch the 2021 Web survey data collection with an estimated sample size of 20,000 cases identified by the Principal Investigator who will deliver the contact information including e-mail address to SRO. The Web survey data collection will replace aspects of the standard mail-based data collection. Both the separately funded Winter Location calling effort and Non-Response follow-up calling will include this sample – with the calling effort being integrated with the standard MTF activities.		
SRO Project Period	01/2022 - 03/2027		
Data Col Period	04/2022 - 10/2026		
Security Plan	NA		
Milestones	<div>Pre Production Start:Pretest End:Staffing Complete:SS Train Start:DC Start:Pretest Start:Recruitment Start:GIT Start:SS Train End:DC End:</div>		
Other Project Team Members	Rebecca Gatward (SPA), Donnalee Grey-Farquharson, Lloyd Hemingway, Hueichun Peng, Shaowei Sun, Peter Sparks, Ashwin Dey, Hongyu Johnson, Minako Edgar, Brad Goodwin		
Other Project Name	MTF		
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	May, 2023 (MTF Panel 2022-27)		Implementing
Risk Level	On Track		
Monthly Updates	1. Management - started the conversation with the study team on moving survey to Qualtrics in 2024 production. - Continues to monitor the production and the WebSMS 2. System - WebSMS specification documentation is complete 3. Data Collection - As of 005/31/2023 -Total Released Sample = 18727 -Total Completes = 6951 - RR = 36.49% 4. Data Delivery: Initial data delivery specs for 2023 received. DM and programmer will soon meet with study team to discuss the details		

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

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

Special Issues

Cost as of May 31, 2023	Total Cost to Date (direct + indirect):	792,630.32
	Est Cost at Completion (E\$AC):	3,877,034.86
	Total Budget:	3,895,217.00
	Variance (Total Budget minus- E\$AC):	18,182.14
	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 May 31, 2023	Dollars Projected for Month:	48,293.71
	Actual Dollars Used:	44,430.68
	Variance (Projected minus Actual):	3,863.03
	Reason for Variance:	The total project amount includes MTF Web Illume as well as Non-Response Calling and Winter Location project. The overrun amount is MTF Panel 2022-2027 that was the combination of MTF Panel 2017-2022 and MTF Web Illume. 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 End: Staffing Complete: SS Train Start: DC Start: Pretest Start: Recruitment Start: GIT Start: SS Train End: 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	May, 2023 (PR-PSID)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Programmer began creating the translation spreadsheets that include the QxQs, interviewer instructions and code frames. SRO delivered the first two batches of spreadsheets to Atabex in May. The translation task is complicated and not a typical task for these translators. SRO provided detailed written instructions, and training over zoom, but has been met with some pushback from the translators not following direction, and reviewing more than asked. Learned that Atabex planned to charge per word. SRO raised concerns that charging per word would not work for the Instrument spreadsheet task, and that the signed contract stated they would charge per hour. First invoice was received in early June -- translation charges were much higher than expected. First invoice amounted to 1/3 of the total translation budget, but does not account for 1/3 of the work scope. SRO and PIs concerned about the amount of translation work remaining, and the cost. SRO and PIs concerned about translation timeline and whether Atabex can handle the work as quickly as we need		

them to. SRO and PIs met to discuss hiring additional Spanish resources. PIs received approval from Brown to post a position for a bilingual temp. A research team member will handle the screening process.

SRO help desk and Mgt met with ETI to discuss hardware requirements and the process for ghosting the laptops. ETI began the process of procuring the laptops. SRO mgt and ETI mgt are meeting weekly to coordinate pretest planning. PIs provided ETI with parameters for the pretest convenience sample.

Mgt worked on ST specs, and ST programming began. Began discussing necessary changes to Core Blaise preload structure for PR.

Special Issues	Timeline concerns: unsure how long translations will take. Pretest training will need to be delayed, most likely until October. Cost of translation is significantly higher than projected.			
Cost as of Jun 15, 2023	Total Cost to Date (direct + indirect):			302,060.75
	Est Cost at Completion (E\$AC):			1,246,446.03
	Total Budget:			1,292,585.00
	Variance (Total Budget minus- E\$AC):			46,138.97
	Reason for Variance:			Projected cost to complete increased by \$2.4k between April and May due to increasing Help Desk hours.
Projections as of Jun 15, 2023	Dollars Projected for Month:			46,723.41
	Actual Dollars Used:			31,840.13
	Variance (Projected minus Actual):			14,883.28
	Reason for Variance:			ST programmer and data manager actuals lower than projected.
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

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

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

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

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

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

Current activities:

Blaise programming:

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

SurveyTrak programming:

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

MSMS Programming:

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

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

Special Issues

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

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

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

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

Other Measures

Project Name	(PSID23 Online Contact Update) Panel Study of Income Dynamics 2023 Online Contact Update		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 47,456.00	Indirect Budget: 0.00	Total Budget: 47,456.00
Principal	Katherine McGonagle (PSID)		
Investigator/Clients			
Funding Agency	NSF, NIA, NICHD, The Office of the Assistant Secretary for Planning and Evaluation of the United States, DHHS, The Economic Research Service of the United States Department of Agriculture, HUD, DOL, The Center on Philanthropy at the Indiana University-Purdue University		
IRB	HUM#: HUM00062417	Period of Approval: 3/22/22-3/21/23	
Project Team	Project Lead: Camila Kendall Budget Analyst: Ivanna Iavorska-Em Production Manager: Senior Project Advisor: Stephanie A Chardoul Production Manager 1: Production Manager 2:		
Proposal #	no data		
Description	SRO will write technical specifications, program and test a Blaise 5 web instrument and web portal with authentication that will allow PSID and TAS respondents to confirm or update their contact information via an online survey. SRO will provide PSID will authenticated QR codes that will be embedded in a mailing sent to respondents. SRO will also send the respondents one email reminder with an authenticated link. This project is under the PSID Core IRB.		
SRO Project Period	04/2022 - 12/2022		
Data Col Period	06/2022 - 12/2022		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 04/01/2022 Pretest End: Staffing Complete: SS Train Start: DC Start: 07/01/2022 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 11/30/2022 </div> </div>		
Other Project Team Members	Rachel Orlowski -- PSID Core Lead Karl Dinkelmann -- TSG Lead and Blaise Programming Support Marsha Skoman -- Blaise Programmer Daric Thorne -- MSMS Spec Lead Kyle Goodman -- MSMS Set up Programmer Jim Rodgers -- MSMS Lead Rose Zybel -- Data Manager		
Other Project Name			
Sample Mgmt System	MSMS		
Data Col Tool	Blaise 5		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	ISR Group (PSID)		
Payment Type	Check, post (\$10); Other (electronic, post--JP Morgan)		
Payment Method	Check through other system (PSID staff will handle check & e-payment via RAPS)		

Report Period	May, 2023 (PSID23 Online Contact		Closing
Risk Level	On Track		
Monthly Updates	Projected 12 hours for project archiving, but only 4 hours hit the project this month. Moved hours forward for the Database Administrator Senior and App Programmer/Analyst Sr. June's cost report will be the final cost report.		
Special Issues			
Cost as of Jun 13, 2023	Total Cost to Date (direct + indirect):		46,208.05
	Est Cost at Completion (E\$AC):		46,893.30
	Total Budget:		47,456.00

Variance (Total Budget minus- E\$AC):		562.70		
Reason for Variance:		No change since last month		
Projections as of Jun 13, 2023	Dollars Projected for Month:	1,518.52		
Actual Dollars Used:		408.03		
Variance (Projected minus Actual):		1,110.49		
Reason for Variance:		Database Administrator Senior and App Programmer/Analyst Sr. forgot to charge time for archiving.		
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 Investigator/Clients	Katherine McGonagle (UM-SRC-PSID) Narayan Sastry (UM-SRC-PSID) Esther Friedman (UM-SRC-PSID)		
Funding Agency			
IRB	HUM#: HUM00062417		Period of Approval: 3/22/22-3/21/24
Project Team	Project Lead: Rachel Anne Orlowski Budget Analyst: Ivanna Iavorska-Em Production Manager: Stacy Quisenberry Senior Project Advisor: Stephanie A Chardoul Production Manager 1: Daric Thorne Production Manager 2: Shonda R Kruger-Ndiaye		
Proposal #	no data		
Description	<p>The Panel Study of Income Dynamics (PSID--also known to Respondents as the Family Economics Study or FES) is a longitudinal survey of several thousand individuals and their families, carried out since 1968 and conducted every two years. The sample is comprised of respondents from the 4,800 original families as well as new (immigrant) sample added in 1997/1999 and 2017/2019. The total 2023 sample size will be approx. 11,200, with approx. 9,650 completed interviews expected. Most of the information collected is about family composition and changes (marriages, divorces, births, deaths, people moving in and out); income sources and amounts; employment and pensions; and wealth. There are also questions about housing; education; vehicles; health; fertility; COVID-19; and money spent on food, healthcare, and school. The main focus is on how these family composition and financial factors interact with each other and how they change over time. The survey will be administered via web and telephone, with the expectation that more surveys will be completed via web than telephone (which will be a first for the study).</p> <p>During the 2023 wave, saliva samples will be collected for the first time on PSID Core. The Core interview must be completed to be eligible for saliva collection. Saliva sample participants that are eligible for collection during Core are adults related to Child Development Supplement (CDS) children but do not live with them. Interviewers will be trained on both the interview and saliva collection protocols. Both data collection efforts will be managed in the same MSMS project.</p> <p>The 2023 waves of CDS and the Transition into Adulthood (TAS) will follow PSID Core data collection. CDS and TAS eligibility is dependent upon completion of PSID Core.</p>		
SRO Project Period	03/2022 - 05/2024		
Data Col Period	03/2023 - 02/2024		
Security Plan	NA		
Milestones	Pre Production Start: 03/01/2022 Pretest End: 10/31/2022 Staffing Complete: 04/21/2023 SS Train Start: 03/08/2023 DC Start: 03/23/2023 Pretest Start: 10/11/2022 Recruitment Start: 09/19/2022 GIT Start: 06/05/2023 SS Train End: 06/11/2023 DC End: 02/28/2024		
Other Project Team Members	TSG Tech Leads - Jim Rodgers, Jeff Smith, & Karl Dinkelmann; Data Manager - Brad Goodwin; 68ID Site Programmer - Ashwin Dey; Blaise Programmer - Jude Perillo; MSMS Programmers - Pam Swanson; Self Scheduler Programmer - Peter Sparks; Help Desk Support - Andrea Pierce; Production Tech Support - Sarah Broumand; Testing Coordinator - Camila Kendall; Project/Production Support - Mark Nathin, Janet McBride, & Xiomara Lorenzo-Guerra; Reporting, Mapping, & Sample Assignment - Ji Qi & Wen Chang		
Other Project Name	PSID Core 2023		
Sample Mgmt System	MSMS		
Data Col Tool	Blaise 5		
Hardware	Laptop; [UM cell] Phone		
DE Software	N/A		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, Other (Locator, Proxy)		
Administration	ISR Group (PSID)		
Payment Type	Check, post (Varies); Cash, post (Varies); Other (electronic, post--JP Morgan)		
Payment Method	Check through other system (PSID will handle check & e-payment via RAPS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (PSID will handle check & e-payment via RAPS)		
=====			

Report Period	May, 2023 (PSID23)		Implementing	
Risk Level	Some Concerns			
Monthly Updates	<p>Summary of May 2023 Activities</p> <p>Tech: SRO Blaise Admins began a load test of the six server solution. Pls will wait for the server testing results before deciding if/when to move production to the new server environment. The test integration project and the training project were set up in the six-server environment.</p> <p>Spanish CATI and web programming continued. Spanish CATI testing was underway. Report development, splitoff development, and saliva system development continued. Continued work on Team Locating within the 68ID Site.</p> <p>Production: The remainder of Release 4 was invited at the beginning of May. We began inviting Release 5 on May 22. We initiated the Web Special Offer intervention for Release 3 on May 3, for Release 4 on May 15, and for Release 4A-4x on May 30. We determined the production schedule for the Roadrunner experiment, which will start the week of June 19.</p> <p>PSID staff did not notify SRO when delivering sample preload that there were families with only minors. SRO unknowingly communicated with minors. These SIDs were put on hold. This incident was reported to the IRB, and SRO changed its protocol for loading these minor-only cases in the sample management system.</p> <p>PSID staff sent two different respondents' checks to one respondent. The staff received retraining. This incident was reported to the IRB.</p> <p>Training: Preparations continue for Training 2 (June 5-11). Study Specific Home Study ran from 5/18 - 5/26. 23 interviewers (out of 83) required TL follow-up and assessment retakes. Several received extensions, which carried Home Study until 6/2.</p> <p>Staffing: At end of May, number of new hires fell from 86 to 67.</p>			
Special Issues	Unable to staff as many on-staff interviewer hours as budgeted -- many shared agreements. Experiencing higher than anticipated levels of on-staffer attrition. Need more new hires than anticipated, which has a sizable negative impact on the budget and proposes a risk to data collection.			
Cost as of Jun 20, 2023	Total Cost to Date (direct + indirect):		1,443,103.35	
	Est Cost at Completion (E\$AC):		6,414,662.02	
	Total Budget:		6,235,802.00	
	Variance (Total Budget minus- E\$AC):		-178,860.02	
	Reason for Variance:	CRS has the main iw and saliva budgets loaded. Rates for staff working on the project are higher than budgeted rates. More new hires are needed than what was budgeted. Note: Unable to separate Core IDC costs from Contact Update IDC costs. Cost values only reflect Direct Costs.		
Projections as of Jun 20, 2023	Dollars Projected for Month:		400,699.93	
	Actual Dollars Used:		252,072.19	
	Variance (Projected minus Actual):		148,627.74	
	Reason for Variance:	Costs for saliva kits did not hit, which explains more than half of the variance. Managers, help desk, training support, administrative assistants, and recruitment staff charged less time than projected. Note: Unable to separate Core IDC costs from Contact Update IDC costs. Cost values only reflect Direct Costs.		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:	9646	89%	6.58
	Current Actual:	3158	43%	1.6
	Estimate at Complete:			
	Variance:			
Other Measures	<p>Notes for Measures Above: From Dashboard through 6/3/23. Units = 3158 iws (355 CATI--11%, 2803 web--89%). Still need to develop a goal chart.</p> <p>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.</p>			

Project Name	(QoL & Hearing Loss) Quality-of-Life for Amish Children with Hearing Loss		
Project Mode	Primary: Cognitive IW Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 8,200.00	Indirect Budget: 0.00	Total Budget: 8,200.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Margaret Lee Hudson		
	Budget Analyst:		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1: Lisa Van Havermaet		
	Production Manager 2:		
Proposal #	no data		
Description	Cognitive interviews to develop a QoL instrument for Amish children with hearing loss		
SRO Project Period	02/2022 - 12/2023		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name	Amish study		
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Not used		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	May, 2023 (QoL & Hearing Loss)		Implementing
Risk Level	On Track		
Monthly Updates	No work was done on the project in April. We will next be going to the field to conduct cognitive interviews as part of the June quarterly community clinic on 6/7/23.		
Special Issues			
Cost as of	Total Cost to Date (direct + indirect):		0.00
	Est Cost at Completion (E\$AC):		0.00
	Total Budget:		8,200.00
	Variance (Total Budget minus- E\$AC):		0.00
	Reason for Variance:		
Projections as of	Dollars Projected for Month:		0.00
	Actual Dollars Used:		0.00
	Variance (Projected minus Actual):		0.00
	Reason for Variance:		

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

Other Measures

Project Name	(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	<p>The WJ-RAP is the continuation study from the WJ-Pilot of 2021.</p> <p>The goal of this project is to complete Woodcock Johnson Tests of Cognitive Abilities both remotely and in person, during two separate interviews, from 80 families with an average of 1.5 children aged 5-17 per family. SRO will recruit a convenience sample of 90 families in order to obtain a completed remote and in-person interview from 80 families. For the remote administration interview, a tablet computer will be sent to respondents and used to electronically display the pages of the Woodcock Johnson assessment tool while an SRO interviewer communicates via a video link on a laptop. The Respondent will return the tablet in a postage paid mailer. For the in-person interview, an SRO interviewer will travel to meet respondents in person and conduct another version of the Woodcock Johnson assessment using Woodcock Johnson easels. This project will take place from January 2023 to September 2023.</p>		
SRO Project Period	02/2023 - 12/2023		
Data Col Period	06/2023 - 08/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Stephanie Chardoul - SRO SPA Sarah Crane - Survey Director (Project Consultant) and Production Manager Helen (Hongyu) Johnson - Lead Project Manager Mari Haft- SRO staff Youhong Liu - Blaise Programmer Kelly Lieske - Blaise Programmer Edward Green - Data Manager Laura Yoder - Data Operations Supervisor Jeff Smith - Data Operations Supervisor John Gawlas - HelpDesk staff David Bolt - HelpDesk Supervisor Russ Stark - DCO Staff Tyler Davis-Kean - DCO Assistant (temp)		
Other Project Name	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	May, 2023 (SAME)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Project Management:		

- Regularly provide updates to the SRO Admin team.
- Continue to closely monitor the costs and adjust projections with the financial analyst.
- Prepare training materials and ppts
- Purchased equipment/hardware as needed

Technical System Development and Testing/Training:

- Continue to coordinate with the technical team staff to monitor tech issues during training
- Coordinate HD for training support

Interviewer Hiring

- one iwer missed T1 and dropped out.
- Successfully secured 4 additional interviewer

Training

- T1 95/25-5/28, 5/30-5/31) - 4 hours a day for a total of 6 days: trained 4 iwers, went well. They started the recruitment right after the training finished.
- T2 (6/5-6/9) will have 3 iwers who will be trained by the project lead and the field leader, and T3 (6/12-6/14) will be one-on-one training by the field leader.
- Continue to work on training materials and upload to Canvas.

Sample Recruitment: started slow, only relied on SAME 4 trained iwers and the field leader.

Special Issues	we did not meet staffing goals (8 lwers & 1 TL), and are working on an alternate training plan to bring on add'l lwers. Also, the PI raised some concerns about recruiting enough convenience sample with the smaller lwer team, so we're exploring options to have SRO regular and contingent staff nominate families in the target areas.			
Cost as of May 31, 2023	Total Cost to Date (direct + indirect):	98,578.11		
	Est Cost at Completion (E\$AC):	326,387.02		
	Total Budget:	302,327.00		
	Variance (Total Budget minus- E\$AC):	-24,060.02		
	Reason for Variance:	The overrun was caused by readjusting the estimated projections across the board to the end of September 2023		
Projections as of May 31, 2023	Dollars Projected for Month:	54,533.74		
	Actual Dollars Used:	25,321.43		
	Variance (Projected minus Actual):	29,212.31		
	Reason for Variance:	Application programmers used less hours on fixing issues.		
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	<p>The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations.</p> <p>The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 600 interviews.</p>		
SRO Project Period	01/2023 - 12/2023		
Data Col Period	12/2022 - 12/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: 12/27/2022 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 12/20/2023 </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; Desktop; [UM cell] Phone		
DE Software	NA		
QC Recording Tool	DRI-CXM		
Incentive	Not used		
Administration	N/A		
Payment Type	N/A		
Payment Method	N/A		

Report Period	May, 2023 (SCA 2023)		Initiation
Risk Level	On Track		
Monthly Updates	SCA MAY 2023 began as scheduled on Wednesday, April 26th and ended a day early on Sunday, May 21st. We completed 605 interviews for the month (322/181/102), 5 interviews above the monthly goals of 600 (320/180/100) with the prior approval of the Pls. The request to exceed the RDD and R12 goals was made as there were some concern about possibly not meeting the R6 goal (which was in the end not only met but also exceeded by 1). The HPI for May was 3.19; .19 above the 3.0 (but .01 below the budgeted goal of 3.2). A class of new interviewers were trained at the end of the April study month contributing to the higher than usual HPI, as well as higher than usual QC costs.		
Special Issues			
Cost as of Jun 07, 2023	Total Cost to Date (direct + indirect):		514,266.05
	Est Cost at Completion (E\$AC):		1,305,123.11
	Total Budget:		1,332,352.00

Variance (Total Budget minus- E\$AC):		27,228.89		
Reason for Variance:		Overall HPI remains lower than budgeted.		
Projections as of Jun 07, 2023	Dollars Projected for Month:	106,466.79		
	Actual Dollars Used:	107,444.76		
	Variance (Projected minus Actual):	-977.97		
	Reason for Variance:	Reduced Production Manager costs due to vacation.		
Measures		Units at Complete	RR	HPI
	Current Goal:	600		3.0
	Goal at Completion:	600		3.0
	Current Actual:	605		3.19
	Estimate at Complete:	605		3.19
	Variance:	5		.19
Other Measures				

Project Name	(SRS 2021) Social Relations 2023		
Project Mode	Primary: Face to Face Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 3,767,057.11	Indirect Budget: 2,109,553.00	Total Budget: 5,876,610.11
Principal	Toni Antonucci (ISR)		
Investigator/Clients	Kristine Ajrouch (ISR)		
	Laura Zahodne (ISR)		
Funding Agency	NIH		
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Tagh Reid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 3400 interviews with respondents aged 35 years or older residing in the tri-county area of Southeast Michigan (Wayne, Oakland and Macomb counties) and 244 interviews with original Social Relations panel sample members aged younger than 65 years of age. The project involves screening up to 6900 new sample lines., with one selected respondent per household. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements (height, weight, blood pressure, grip strength) and saliva collection. The SRS 2023 project will use the same instrument programmed for the D-Amp project, with the only new programming being that for a screener. The screener will be translated into Arabic. No informant or proxy interview is included in the project scope. Interviews will be conducted in English or Arabic.		
SRO Project Period	09/2021 - 05/2023		
Data Col Period	05/2023 - 04/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 09/01/2022 Pretest End: Staffing Complete: 04/10/2023 SS Train Start: 05/18/2023 DC Start: 05/30/2023 </div> <div> Pretest Start: Recruitment Start: 02/01/2023 GIT Start: 05/16/2023 SS Train End: 05/25/2023 DC End: 04/30/2023 </div> </div>		
Other Project Team Members	Tagh Reid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall		
Other Project Name	Social Relations 2022, DAWN, Social Relations 2023		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	DRI-CARI		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Cash, prepaid (\$75 respondent, \$25 informant); Other (\$2 screener incentive)		
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)		

Report Period	May, 2023 (SRS 2021)		Implementing
Risk Level	Some Concerns		
Monthly Updates	During May 2023, SRC activities on the DAWN projects included the following: Task 1: Management, Budget and Work Plan • Held meetings with the DAWN research team to discuss study planning, budget, scope and schedule for D-Amp and SRS. • Financial o Prepared cost reports and reviewed monthly expenses. o Finalized projections and entered them into the cost reporting system • Technical systems & Questionnaires o Continued work to finalize specifications for the main interview, physical measures and cognitive sections. o Conducted repeated rounds of testing on all instruments and on the sample management systems o Updated and formatted Respondent Booklets for Main & Informant o Continued updates to the Arabic informant questionnaire, QxQs and respondent booklet.		

- o Conducted rounds of testing on the screener application. Conducted automated testing on the screener application.
- Training preparation
 - o Finalized study-specific training agenda for team leader training, train-the-trainer, and interviewer training.
 - o Finished writing chapters for interviewer manual. Formatted and assembled sections for laptop loading.
 - o Finalized home study for new hires and published on Canvas.
 - o Finalized powerpoint presentations.
- o Conducted interviewer training.
- Production preparation
 - o Finalized printing materials and items needed for production.
 - o Packed interviewer duffle bags and kits.
 - o Received and inventoried kits for training.

Task 2: Sampling

- Prepared and delivered sample files
- Provided revised specification for screener
- Provided input for field progress reports and dashboards
- Began preparation of dashboards for production monitoring

Task 3: Questionnaire Development

- See Task 1 for activities completed by the management team
- Conducted repeated rounds of testing on all instruments
- Began work to prepare Arabic specifications for updates
- Updated Arabic QxQs for the Interview Informant questionnaire; updated Informant respondent booklet

Task 4: CAI Programming

- Continued bug and format fixes on the screener instrument (English & Arabic)
- Updated programming in all sections of the Main interview, conducted repeated rounds testing and bug fixes
- Integrated electronic consent forms and receipts

Task 5: Systems Programming

- Continued programming updates to the SurveyTrak screener project to allow it to create sample lines for both D-Amp and SRS.
- Continued programming changes to SurveyTrak Main D-Amp project for proper creation/loading of informant information.
- Conducted continued rounds of testing/bug fixes to all sample management instruments
- Began preparation of systems for quality control
- Worked to resolve recording issues
- Loaded and delivered laptops for training

Tasks 6, 7: Interviewer Recruitment & Hiring, Training

- Facilities
 - o Set up training rooms; provided on-site management and coordination
- Interviewer recruitment for May
 - o Processed hiring paperwork for all new hires for May training
- Interviewer recruitment for July
 - o Updated posting paperwork
 - o Evaluated applications, conducted 1st, 2nd interviews for interviewer positions; conducted bilingual certification interviews
 - o Attended hiring fairs, posted flyers and updated advertisements
 - o Made offers to selected candidates, processed hiring paperwork and requested background checks.
- Training
 - o Finalize plans for interviewer and team leader training
 - o Prepared and shipped home study materials for team leaders
 - o Prepared training materials for interviewers, published home study
 - o Conducted interviewer training from May 15 through May 25.
 - ? General interviewing techniques held May 15 and 16
 - ? Study Specific May 16 (afternoon) through May 25
 - ? 23 interviewers expected at training, 19 attended (2 drops during training), 15 fully certified, 2 certified for screening only (numbers include 4 bilinguals)

Task 8: Main Data Collection

- Obtained imprest cash for prenotification letters. Prepared mailing and shipped prenotification letters on May 25.
- Prepared bulk supplies for interviewers, handed out bulk supplies after certification.
- Production screening began May 30; production interviewing began June 1 (delayed due to pending IRB approval)
- Through May 31:
 - o 25 completed screening interviews, with 0 eligible for D-AMP, 22 eligible for SRS
 - o 0 production interviews (awaiting IRB approval)
 - o First interview scheduled for June 2, 2022

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

- Production is proceeding much more slowly than had been anticipated. Many interviewers are not working the required number of hours for various reasons. As of 6/19/2023, only 28 main interviews have been completed. Production managers and team leaders are working with interviewers to ensure that they work the required number of hours.
- DMSS requested a change to the programming for the screening instrument on May 12. This will require revamping the screener programming and significant testing -- an added, unanticipated expense to the project. About 100 sample lines are being held back from production launch until this change can be made.
- The project is experiencing significant attrition before, during training, and before production starts. 28 interviewers were hired. 17 interviewers completed training with 15 fully certified and 2 screeners. One interviewer resigned between the end of training and the start of production interviewing.
- Preparation of all instruments is running severely behind schedule. The project will launch without full functionality in production monitoring programs. This is because of both a lack of capacity to prepare specifications and a lack of capacity in programming resources.
- The project continues to experience issues with technical systems leading to unanticipated programming costs.

• Financial:

o SRO is carefully monitoring programming progress and cost. Some line items currently have slack that will be able to absorb modest overruns on other line items.

? Blaise programming will be higher than budgeted due to the complexity of launching the electronic consent forms, addition of the consent process programming, and changes to the questionnaire which involved re-working a majority of the skip patterns and respondent booklet references.

? SurveyTrak programming will be higher than budgeted due to the unexpected complexity of the screener project programming, which generates sample lines for two studies. It has also been more difficult than anticipated to resurrect programming from 2019/2020 and update to the most current version of SurveyTrak.

• Interviewer Attrition

o The project hired 28 interviewers for the May training, but is experiencing substantial attrition prior to and during training. This level of attrition is similar to that being experienced by other SRO projects and also by other survey research firms. Reasons for attrition include finding full-time employment with benefits, family or personal emergencies, or unexplained drops. 15 interviewers were fully certified, and 2 were certified for screening only. One interviewer resigned before production started on May 30, leaving 14 certified interviewers with two screening interviewers.

• Schedule

o Programming is running behind schedule due to issues noted above.

? Priority is being given to launching the screener (English & Arabic), and the main survey, physical measures and cognition sections in English, as well as the informant questionnaire in English. 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.

Cost as of Jun 15, 2023	Total Cost to Date (direct + indirect):	417,239.19
	Est Cost at Completion (E\$AC):	5,869,966.23
	Total Budget:	5,876,610.11
	Variance (Total Budget minus- E\$AC):	6,643.88
	Reason for Variance:	The variance is insignificant at this time, and can be attributed to lower interviewer costs due to the use of all new hire interviewers. Production is very slow, and does not yet allow interviewing cost projections for the full project period. We do anticipate that the underrun will disappear due to higher travel and interviewing costs.

Projections as of Jun 15, 2023	Dollars Projected for Month:	164,885.87
	Actual Dollars Used:	111,913.26
	Variance (Projected minus Actual):	52,972.61
	Reason for Variance:	Training travel was not expensed as projected during May. Labor on several line items came in substantially lower than anticipated, likely due to staff splitting their time across a number of project assignments. Interviewer hours were lower than anticipated during to high attrition before and during training. In addition, Survey Tech hours were projected, however the team did not start work until June 18 due to technical issues.

Measures		Units at Complete	RR	HPI
	Current Goal:	3644	varies	10.5
	Goal at Completion:	3644	varies	10.5
	Current Actual:			
	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
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Project Name	(STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 8,196,521.00	Indirect Budget: 4,590,892.00	Total Budget: 12,809,390.00
Principal Investigator/Clients	James Wagner (University of Michigan) Robert Ursano (Uniformed Services University of the Health Science) Murray Stein / Ron Kessler (University of California San Diego / Harvard)		
Funding Agency	Department of Defense		
IRB	HUM#: HUM00180765	Period of Approval: 4/21/22 - 4/20/23	
Project Team	Project Lead: Meredith A House Budget Analyst: William Lokers Production Manager: Ruth B Philippou Senior Project Advisor: Lisa S Holland Production Manager 1: Jeffrey Albrecht Jr Production Manager 2: Lisa M Lewandowski-Romps		
Proposal #	no data		
Description	<p>This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.</p> <p>For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data.</p> <p>To date, we have completed 2 waves of STARRS-LS interviewing. During Wave 1, we attempted to contact 50,000 individuals and completed approximately 14,500 full interviews. All Wave 1 participants that completed a full Wave 1 interview were asked to participate in Wave 2. Waves 3 and 4, which are covered in this application, will include the full STARRS-LS Wave 2 sample, regardless of whether they completed the interview.</p> <p>In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys).</p>		
SRO Project Period	05/2020 - 04/2025		
Data Col Period	11/2022 - 04/2024		
Security Plan	Yes		
Milestones	<div> <div> Pre Production Start: 04/01/2022 Pretest End: Staffing Complete: 10/01/2022 SS Train Start: 11/14/2022 DC Start: 11/07/2022 </div> <div> Pretest Start: Recruitment Start: 07/23/2022 GIT Start: SS Train End: 11/17/2022 DC End: 04/15/2024 </div> </div>		
Other Project Team Members	Ryan Yoder, Keith Liebetreu, Becky Loomis, Steven Sonoras, Jaleesa Rosario Turner, Andrew Piskorowski, Rose Zdybel, Ji Qi, Makenna Harrison, Lamont Manley, Lisa Van Havermaet, Stephanie Windisch, Youhong Liu, Peter Sparks. Pam Swanson, Jim Rodgers, Marcus Blough, Nick Hinkle-DeGroot, Pete Westhead		
Other Project Name	STARRS-LS Continuation		
Sample Mgmt System	MSMS		
Data Col Tool	Blaise 5		
Hardware	Laptop; Desktop; [UM cell] Phone		
DE Software	N/A		
QC Recording Tool	Other (Blaise CARI)		
Incentive	Yes, R		

Administration	SRO Group
Payment Type	Check, post (\$50-\$100)
Payment Method	Check through other system (MSMS)
<hr/>	
Report Period	May, 2023 (STARRS-LS Waves 3 & 4)
Risk Level	Implementing
Monthly Updates	<p>On Track</p> <p>Project Management and Planning:</p> <ul style="list-style-type: none"> ? U-M wrote the Year 3 annual report and sent a draft to USUHS on May 9 and the final version on May 16. ? 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 received PI approval for the proposed experiment to test the effects of providing a heads-up message early on in the survey that informs respondents that they will be able to provide open-responses at the end of the survey in the soon-to-be-added "other experiences" open-ended item. ? On May 5, we received the start letter from HJF, which reflects the 10-month budget amount for Year 4 (May 2023 through February 2024) and the supplemental funding for the ICPSR biosample flags and related work. As of the end of May, we were still spending down the Year3 award. ? We awaited the actual Year 4 sub-award. Last month, we had asked if HJF could provide a statement with the Year 4 sub-award that it does not identify Controlled Unclassified Information (CUI) and that CUI will not be passed between HJF and U-M. We hope to avoid unexpected issues like last year, where language about required CUI handling was included in the sub-award language and it significantly delayed award processing until a clarification statement about the CUI could be provided. <p>? IRB:</p> <ul style="list-style-type: none"> o IRB amendments for the biosample flag/administrative data/inventory document public release were approved by the U-M IRB on May 23 and sent to USUHS on May 24. o An IRB amendment for adding the open-end question and heads-up message experiment was submitted to the U-M IRB on May 10. ? STARRS-affiliated, but not STARRS funded, work: o VA/HEARTH project: ? The IRB protocol was written and submitted to the U-M IRB on May 16. The IRB administrator sent comments and questions on May 24 and we replied on May 30 as requested. After approval, we will apply for a Certificate of Confidentiality. ? We awaited the sub-award from Harvard. <p>Enclave and User Support:</p> <ul style="list-style-type: none"> ? We continued work on necessary corrections and changes to our processing code related to the 12 NDI non-death records. ? 2023 repeat NDI search: o Dr. Ursano, Aaron and Meredith met with Velida Juzbasic and Ada Zyka (CDC NDI Office) on May11 to review the online application and uploaded agreements and IRB approvals. To address the requirement of the NDI acquisition needing to be listed in the IRB, we added the STARRS Historical Data (Enclave) IRB approval and protocol to the application (in addition to the LS protocol). The application was submitted May 17 and approved on May 18. o Enclave staff took final steps to prepare the submission file for the annual search. o We awaited the issue of payment to be resolved by M&RA and HJF/USUHS. ? Standard Enclave activities continued. These include maintaining security requirements; processing background checks and Great Lakes Cluster user access requests, drop box requests, ID swap and data transfer requests; managing software acquisition and updates; and providing user support as needed. Of particular note this month: o SHOS-A qualitative data from Harvard were transferred to the Enclave, ID swaps were carried out, and the data were made available for analyst pick-up on May 9. o Additional work was completed on the requests related to the blood sample counts [by survey data collection (i.e. AAS, NSS, PPDS, SHOS-A, LS1, LS2) for the Army STARRS participants, the STARRS-LS cohort and respondents with data at ICPSR] for Dr. Ursano. ? Biomarker group request for assistance in May: o Related to an inquiry from a researcher at Duke who is interested in accessing some of the biosamples, we sent counts of STARRS unique soldiers with plasma samples to Dr. Stein. We also confirmed that plasma is not available for NSS or SHOS-A. <p>Wave 3 Data Deliverable</p> <ul style="list-style-type: none"> ? We received LS3 weights documentation, updated to account for the extra eligible (non-deceased) respondent, from Harvard on May 3. ? The LSW3 weights dataset was loaded to the Enclave on May 16. ? We corrected a few mistakes in variable labels in the LSW3 crosswalk and updated it on the Enclave and in Google Shared Drive on May 22. ? We received diagnostic algorithms/constructs from Harvard on May 22. <p>Public Use Data:</p> <ul style="list-style-type: none"> ? Wave 3: o Draft LSW3 weights documentation for the user guide, other user guide edits and website edits were sent to the PIs for review on May 5. Harvard provided signoff on May 19. o The draft LSW3 crosswalk for public use deliverables was sent to Harvard for review on May 22. o A meeting was scheduled with our ICPSR colleagues for June 2. ? Biosample flags, administrative variables, and inventory document: o The Enclave team continued work on adding the WGS flags to the biosample inventory soon. ? We awaited decisions from the Army/GSC on producing the genetic and bioassay files for public use and placing data in the NIH National Data Archive and Public use release for GWAS. <p>Wave 4 Production Updates:</p> <ul style="list-style-type: none"> ? Wave 4 production statistics, as of June 6, 2023, are as follows: o Replicates released: 7 of 14 released with 7,327 sample lines. o Completed interviews: 4,426 (4,167 web; 259 phone).

- o Replicate 5 ended production on June 5 with a final response rate of 77.2%, outperforming prior Wave 4 replicates. This raised the overall response rate for completed replicates to 74.9% (from 74.2%).
- o Replicate 6 completed Phase 2 and transitioned to Phase 3 on May 24. The response rate is currently 53.2% and trending with the average Wave 4 rate.
- o Replicate 7 was released on June 5. So far, there are no completed surveys.
- o The response rate for completed replicates (Reps 1-5) is 74.9%.

Safety Plan Results:

? The Wave 4 Safety Plan rate is 11.1% as of June 6.

Special Issues There were no changes to the descriptions of the areas of risk in May.









































Cost as of Apr 30, 2023	Total Cost to Date (direct + indirect):	7,708,903.25
	Est Cost at Completion (E\$AC):	12,863,948.17
	Total Budget:	12,809,390.00
	Variance (Total Budget minus- E\$AC):	-54,558.17
	Reason for Variance:	We spent a total of \$286,111 in April. Our projected deficit for the total five-year project is slightly higher at \$54,558 (compared to \$45,418 in March). This month, we added/adjusted hours for a new production manager joining the project. We will continue to review project expenses and update our projections based on realized costs and our experiences to date.

Projections as of Apr 30, 2023	Dollars Projected for Month:	303,252.25
	Actual Dollars Used:	286,111.02
	Variance (Projected minus Actual):	17,141.23
	Reason for Variance:	There was about \$9K of Rpay that did not hit in April that will be moved forward. Some training costs came through in April, but were projected in May – these projections will be reduced.

Measures		Units at Complete	RR	HPI
	Current Goal:	10,800	75	10.2
	Goal at Completion:	10,800	75	10.2
	Current Actual:	4,426	74.9 (Reps 1-5)	11.7
	Estimate at Complete:	10,800	75	11
	Variance:			

Other Measures

Developmental/Initiative Projects Dashboard

NonArchived Development Initiative and No-DataCol Projects								
Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr	May
<i>TSME 23-Web Portal Documentation/Updates (423463)</i>	Initiatives	Implementing	Karl A Dinkelmann					
<i>TSME SRO SYS MAINTENANCE-GENERAL(483910)</i>	Initiatives	Implementing	Jeffrey L Smith					
<i>TSME23 DCO Tech System Support FY2023</i>	Initiatives	Implementing	Vivienne Y Outlaw					
<i>TSME23 SRO Web Admin Migration (483257)</i>	Initiatives	Initiation	Hueichun Peng					
<i>TSME23-PIPPA</i>	Initiatives	Implementing	Mark Simonson					
<i>TSME23-QC-Systems (483249)</i>	Initiatives	Implementing	Sarah Elisa Broumand					
<i>TSME23-SelfSchedUI (483424)</i>	Initiatives	Implementing	Andrew L Hupp					
<i>TSME23-Update Report Portal</i>	Initiatives	Implementing	Mark Simonson					

Project Name	(TSME 23-Web Portal Documentation/Updates (423463)) TSME 23-Web Portal Documentation/Updates (423463)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 5,000.00	Indirect Budget: 0.00	Total Budget: 5,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Karl A Dinkelmann		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor: Gregg Peterson		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	This project's necessity came from a need for an easily maintainable and easily usable Blaise login portal for our web surveys. Each project has unique needs, but many of the portal's functions are similar and shared across all projects. This initiative aims to create a generic template that is easy to alter for project-specific needs; while creating a web portal that is easy to use and maintain so that any developer can apply with minimal effort; additionally, the updated Blaise portal includes standardized logging and documentation.		
SRO Project Period	01/2023 - 06/2023		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Shane Empie, Jude Perillo, and Peter Sparks		
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	N/A		
QC Recording Tool	N/A		
Incentive	Not used		
Administration	N/A		
Payment Type	N/A		
Payment Method	N/A		

Report Period	May, 2023 (TSME 23-Web Portal		Implementing
Risk Level	On Track		
Monthly Updates	The remaining funds in this budget for this fiscal year will go towards finalizing documentation and implementing a new feature that will limit the number of respondents in a given survey at one time. Due to concurrency issues, if we exceed the number of respondents the Blaise server can support at one time, we can begin to have catastrophic issues happen. This is because the server becomes overwhelmed by the traffic. This will be a feature a study can turn on if they have a larger survey and anticipate concurrency issues. It will query the Blaise session database for active cases when the respondent logs into the survey. If the maximum number of users is met, it will display a user-friendly message that indicates the server is currently full and they should return to try again at some point in the future. The team expects to exhaust all the remaining funds for this TSME account in June (or by the end of FY23).		
Special Issues	None		
Cost as of Jun 01, 2023	Total Cost to Date (direct + indirect):	5,000.00	
	Est Cost at Completion (E\$AC):	5,000.00	
	Total Budget:	5,000.00	
	Variance (Total Budget minus- E\$AC):	0.00	

Reason for Variance:				
Projections as of Jun 01, 2023	Dollars Projected for Month:			0.00
	Actual Dollars Used:			0.00
	Variance (Projected minus Actual):			0.00
	Reason for Variance:			
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(TSME SRO SYS MAINTENANCE-GENERAL(483910)) TSME SRO SYS MAINTENANCE-GENERAL(483910)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 20,000.00	Indirect Budget: 0.00	Total Budget: 20,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Jeffrey L Smith		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor: Gregg Peterson		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	This project will be used to support all maintenance/enhancements needs for applications or systems directly to the SurveyTrak production database which would include Surveytrak, ST Administration, SRS RT, and RCLS to name a few.		
SRO Project Period	07/2022 - 06/2023		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div>Pre Production Start:</div> <div>Pretest End:</div> <div>Staffing Complete:</div> <div>SS Train Start:</div> <div>DC Start:</div> </div> <div> <div>Pretest Start:</div> <div>Recruitment Start:</div> <div>GIT Start:</div> <div>SS Train End:</div> <div>DC End:</div> </div>		
Other Project Team Members	Ashwin Dey Pam Swanson Marsha Skoman Holly Ackerman Darnell Christian		
Other Project Name	Sys Maint General		
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	May, 2023 (TSME SRO SYS MAINTENANCE-GENERAL(483910))		Implementing
Risk Level	On Track		
Monthly Updates	ST/PB Build Team meetings ST Admin - SSL Termination SCA Monthly Setup enhancements Add SSL termination to ST Admin GIT testing Release new IW Data Merge & ST Admin New "pull GIT sample" feature in PRER Refresh ST App Error Log database		
Special Issues			

Cost as of Jun 16, 2023	Total Cost to Date (direct + indirect):	36,931.73
	Est Cost at Completion (E\$AC):	38,600.21
	Total Budget:	20,000.00
	Variance (Total Budget minus- E\$AC):	-18,600.21
	Reason for Variance:	See monthly updates

Projections as of Jun 16, 2023	Dollars Projected for Month:	1,668.48
	Actual Dollars Used:	1,293.33
	Variance (Projected minus Actual):	375.15
	Reason for Variance:	See monthly updates

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

Other Measures

Project Name	(TSME23 DCO Tech System Support FY2023) TSME23-DCO Tech System Support (483248) 2023		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 35,000.00	Indirect Budget: 0.00	Total Budget: 35,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Vivienne Y Outlaw		
	Budget Analyst: Carl S Remmert		
	Production Manager:		
	Senior Project Advisor: Gregg Peterson		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	This includes all the support and development work for a suite of tech systems DCO uses, including Fred, Recruitment Website, Iwer Web Site, etc.		
SRO Project Period	07/2022 - 06/2023		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Max Malhotra Shaowei Sun		
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	May, 2023 (TSME23 DCO Tech System		Implementing
Risk Level	Some Concerns		
Monthly Updates	- Fred management level support for CARE and PSID staff list - Fixed sorting bug with Staff List - Modified Iwer Website Laptop Removal Form to use SRO_ID, instead of UM_ID - Explored options to automatically upload RWA and FWA file from 2023 FOTY to Fred File Upload module - Fixed the bug with missing Team Assign Date and batch updated the data		
Special Issues			
Cost as of Jun 15, 2023	Total Cost to Date (direct + indirect):	62,871.37	
	Est Cost at Completion (E\$AC):	65,322.98	
	Total Budget:	35,000.00	
	Variance (Total Budget minus- E\$AC):	-30,322.98	
	Reason for Variance:	budget insufficient to support department needs	
Projections as of Jun 15, 2023	Dollars Projected for Month:	2,451.61	
	Actual Dollars Used:	4,111.91	

Reason for Variance: budget insufficient to support department needs				
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(TSME23 SRO Web Admin Migration (483257)) TSME23 SRO Web Admin Server Migration (483257)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 5,000.00	Indirect Budget: 0.00	Total Budget: 5,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Hueichun Peng		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor: Gregg Peterson		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	SROWebAdmin server needs to retire by summer 2023, so we need to migrate all the applications on this server to other web servers.		
SRO Project Period	07/2022 - 09/2023		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div>Pre Production Start:</div> <div>Pretest End:</div> <div>Staffing Complete:</div> <div>SS Train Start:</div> <div>DC Start:</div> </div> <div> <div>Pretest Start:</div> <div>Recruitment Start:</div> <div>GIT Start:</div> <div>SS Train End:</div> <div>DC End:</div> </div>		
Other Project Team Members	Shaowei and Hueichun are the primary programmers to migrate the applications.		
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	May, 2023 (TSME23 SRO Web Admin Migration)		Initiation
Risk Level	On Track		
Monthly Updates	- Continue to work on the Fred Recruitment suite on the new server - Continue to migrate CF applications to SROCFWeb server		
Special Issues			
Cost as of Jun 15, 2023	Total Cost to Date (direct + indirect):		6,383.68
	Est Cost at Completion (E\$AC):		8,774.60
	Total Budget:		5,000.00
	Variance (Total Budget minus- E\$AC):		-3,774.60
	Reason for Variance:		na
Projections as of Jun 15, 2023	Dollars Projected for Month:		2,537.81
	Actual Dollars Used:		2,049.43
	Variance (Projected minus Actual):		488.38
	Reason for Variance:		na

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

Other Measures

Project Name	(TSME23-QC-Systems (483249)) TSME23-QC-Systems (483249)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 30,000.00	Indirect Budget: 0.00	Total Budget: 30,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Sarah Elisa Broumand		
	Budget Analyst: Carl S Remmert		
	Production Manager:		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	Project used to maintain and further develop Current QC systems such as OLIVE		
SRO Project Period	07/2022 - 06/2023		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	May, 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 May was mostly used just to attend meetings, troubleshooting minor issues and transitioning to using ODS for Verification Scoring rather than the MSMS export databases. This was an unanticipated development due to the fact that PSID23 scoring was taking several minutes, causing the system to time out. By moving it to ODS, the scoring became instantaneous.		
Special Issues			
Cost as of Jun 15, 2023	Total Cost to Date (direct + indirect):	29,073.27	
	Est Cost at Completion (E\$AC):	30,550.15	
	Total Budget:	30,000.00	
	Variance (Total Budget minus- E\$AC):	-550.15	
	Reason for Variance:	Small variance.	
Projections as of Jun 15, 2023	Dollars Projected for Month:	1,476.88	

<i>Actual Dollars Used:</i>	2,466.47
<i>Variance (Projected minus Actual):</i>	-989.59

Reason for Variance:
Unanticipated work done to move verification scoring from MSMS to ODS due to performance issues.

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

Other Measures

Project Name	(TSME23-SelfSchedUI (483424)) Self-Scheduling Interface for MSMS		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 10,000.00	Indirect Budget: 0.00	Total Budget: 10,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Andrew L Hupp		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	This technical initiative will continue the work of the respondent facing scheduling interface that wasn't able to be completed the prior fiscal year. In the prior fiscal the basic scheduling tool was created. The current remaining work centers around creating the manager side interface to be able to set parameters and the resulting data MSMS will need to provide the Blaise scheduler. Most of the development work is on the MSMS side to build and interface and the aggregation of data to pass to Blaise to use to determine which appointment slots can be shown on the screen. This budget is for the Blaise side of the work, not the MSMS portion.		
SRO Project Period	07/2022 - 04/2023		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Andrew Piskorowski - writing stored procedure to summary all appointments Mark Simonson - possible manager interface for entering management parameters Peter Sparks - Blaise Developer (R facing page) James Rodgers - consultant as needed for MSMS Cheng Zhou - Manager parameter Ui and web API		
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	Blaise 5		
Hardware	NA		
DE Software	N/A		
QC Recording Tool	N/A		
Incentive	Not used		
Administration	N/A		
Payment Type	N/A		
Payment Method	N/A		

Report Period	May, 2023 (TSME23-SelfSchedUI (483424))		Implementing
Risk Level	On Track		
Monthly Updates	The few remaining projections are to change the way the open and close variables are specified to accommodate the different hours the SSL is open (rather than a generic setting). That work would be done by Andrew P (modifying the stored procedure that takes that information into account), and Cheng to modify the PQT interface to be able to specify open/close times by day. We will be setting this up in the SRC_Demo_2 project in MSMS to test and have a demonstration project when needed.		
Special Issues			
Cost as of Jun 16, 2023	Total Cost to Date (direct + indirect):	14,396.73	
	Est Cost at Completion (E\$AC):	15,103.93	
	Total Budget:	10,000.00	
	Variance (Total Budget minus- E\$AC):	-5,103.93	

Reason for Variance:

Additional work on the API programming and modification to the scheduling parameter for the SSL. I've spoken with Gregg about overrunning the budget and it was okayed.

Projections as of Jun 16, 2023	Dollars Projected for Month:	0.00
	Actual Dollars Used:	62.86
	Variance (Projected minus Actual):	62.86

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

Other Measures