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## ***Survey Research Operations***

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

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

***July 2023***



## Sponsored Data Collection Projects and Development Initiative Projects

(AFHS) American Family Health Study  
(AFHS-Additional work) American Family Health Study - additional work  
(ANES 2024) American National Election Studies - 2024  
(BFY) Baby's First Years  
(BHM Library Project) Developing a Model of Black History Month Programming in Public Libraries  
(CAMS 2023) HRS 2023 Consumption and Activity Mail Study  
(Care & Help Study) Caregiving, Complex Family and Kinship Ties, and Alzheimer's Disease and Related Dementias (ADRD)  
(CARE Military) Concussion Assessment, Research and Education (CARE) Consortium 2022 - Military  
(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022  
(CCS) Community College Survey  
(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  
(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  
(PSID TAS 2023) Transition to Adulthood within its Life Course & Intergenerational Family Context  
(PSID23) Panel Study of Income Dynamics Core 2023  
(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 VA HEARTH) STARRS-LS VA - Housing, Employment, Assessment Risk, Transitions, Help (HEARTH) Project Qualitative Interviews  
(STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study  
(TSME24 DCO System Support (483248)) TSME24 DCO System Support (483248)  
(TSME24 MSMS performance work (425267)) TSME24 MSMS performance work (425267)  
(TSME24 MSMS Working Group (425197)) TSME24 MSMS Working Group (425197)  
(TSME24 SRO System Maintenance - General (483910) ) TSME24 SRO System Maintenance - General (483910)  
(TSME24 SSL Autoscheduler interface development (42) TSME24 SSL Autoscheduler interface development (423463)  
(TSME24 STrak: Migration to SQL Anywhere V17 () TSME24 STrak: Migration to SQL Anywhere V17 (483227)

## Sponsored Projects Dashboard

### NonArchived Sponsored Projects

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

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

Milestones	<b>Pre Production Start:</b> 09/01/2018		<b>Pretest Start:</b>	
	<b>Pretest End:</b>		<b>Recruitment Start:</b>	
	<b>Staffing Complete:</b>		<b>GIT Start:</b>	
	<b>SS Train Start:</b>		<b>SS Train End:</b>	
	<b>DC Start:</b> 04/21/2020		<b>DC End:</b> 04/30/2022	
Other Project Team Members	SRO Team: Andrew Hupp, Laura Yoder, Rose Zdybel, Lloyd F Hemingway, Jim Rodgers, Colette Keyser, Deb Wilson, Wen Chang			
Other Project Name	During the budget proposal stage this project was known as 'A More Efficient Web-Based Approach to Collecting National Family, Fertility and Reproductive Health Data'.			
Sample Mgmt System	MSMS			
Data Col Tool	Blaise 5			
Hardware	Desktop			
DE Software	Other (Blaise 5 (for Mail questionnaires)); External vendor (TBD)			
QC Recording Tool	N/A			
Incentive	Yes, R			
Administration	SRO Group			
Payment Type	Check, post (Modules 1 - \$20, Module 2 - \$20 and Module 3 - \$30); Cash, prepaid (Screener IW - \$2 Potentially \$5 for a subset during NR follow-up)			
Payment Method	Check through STRak RPay System; Check through other system (Info. from MSMS and transfer information via Excel spreadsheet); Imprest Cash Fund from ISR Business Office (Info. from MSMS and transfer information via Excel spreadsheet)			
Report Period	July, 2023 (AFHS)		Closing	
Risk Level	On Track			
Monthly Updates	June update Since last month the overspend on the main AFHS project decreased due to a refund for uncashed cheques. These are the final cheques outstanding that could be credited.  Current SRO focus: Any hours spent on AFHS tasks (projected just for Me, Colette and Dean) are being charged to the AFHS Feasibility budget. These are reported on separately in MPR (AFHS -Panel Feasibility).			
Special Issues	The additional scope (panel feasibility and non-response follow-up) will be funded using sequestered funds (on a separate short code). The PI group have also agreed to fund the overspend on the main AFHS budget.			
Cost as of Aug 08, 2023	<b>Total Cost to Date (direct + indirect):</b>		2,507,734.81	
	<b>Est Cost at Completion (E\$AC):</b>		2,507,734.81	
	<b>Total Budget:</b>		2,490,133.00	
	<b>Variance (Total Budget minus- E\$AC):</b>		-17,601.81	
	<b>Reason for Variance:</b>		July update - as the final uncashed cheques have now been credited and the end of the grant period has passed, Dean and April are working on closing the account. The overrun was covered by NSFG sequestered funds. Hopefully by August the account will be closed.	
Projections as of Aug 08, 2023	<b>Dollars Projected for Month:</b>		0.00	
	<b>Actual Dollars Used:</b>		0.03	
	<b>Variance (Projected minus Actual):</b>		-0.03	
	<b>Reason for Variance:</b>		Any additional spend will be charged to the short code for the 'AFHS additional work' - the overspend from the main AFHS and the additional work are being funded by sequestering funds. The amount credited was for uncashed cheques.	
Measures		Units at Complete	RR	HPI
	Current Goal:	2000 (main IWs)	33.3%	NA
	Goal at Completion:	4000	33.3%	NA
	Current Actual:	2369	64%	NA
	Estimate at Complete:	2369	64%	NA
	Variance:	1631	+21% (see below)	NA
Other Measures				

Project Name	(AFHS-Additional work) American Family Health Study - additional work		
Project Mode	Primary: Web	Secondary: Mail	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 50,265.00	Indirect Budget: 0.00	Total Budget: 50,265.00
Principal Investigator/Clients	Brady West (SRC)		
Funding Agency	Internal UM sequestering funds		
IRB	HUM#: HUM00167171	Period of Approval:	
Project Team	Project Lead: Rebecca Gatward		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lloyd Fate Hemingway		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>The American Family Health Study is a methodological project which aims to evaluate the feasibility of collecting national family, fertility and reproductive health data on a nationally-representative sample using a self-administered mode that is comparable to data collected with an in-person (interviewer-administered) study. The research design for the AFHS has seven clear steps. The additional work covered by this funding is to conduct step 7 (below):</p> <p>Step 1: finalize the design of the national web-based survey, using as much National Survey of Family Growth (NSFG) content as possible.</p> <p>Step 2: field the national web-based sequential mixed-mode survey over a two-year period, with the goal of collecting 4,000 completed surveys from a nationally representative sample.</p> <p>Step 3: conduct statistical analyses providing full-sample comparisons of estimates between our survey and the corresponding public-use data files for the NSFG from a similar time period.</p> <p>Step 4: conduct statistical analyses comparing estimates within key socio-demographic subgroups of the population – gender, race, and age groups.</p> <p>Step 5: examine changes in the gap in estimates (between the NSFG and our national web survey) across phases of the sequential mixed-mode design protocol.</p> <p>Step 6: compare costs, response indicators, and measures of effort across socio-demographic subgroups for different data collection modes and modules of the web-based survey.</p> <p>Step 7: further methodological research involving AFHS participants and non-respondents to inform the design of a larger-scale AFHS (research proposal).</p> <p>*****AFHS Panel Feasibility Survey*****</p> <p>The first component of this step involves AFHS respondents from the second sample replicate (n=~1370). These respondents will be invited to participate in a brief follow-up survey that aims to collect responses to a small number of additional questions (12) related to health, relationships, and finances, as well as gauge the interest of the respondent in becoming a panel member. These results will primarily be used to inform the design of a larger-scale AFHS study (research proposal); additional substantive analyses of the questions will also be conducted.</p> <p>All AFHS participants from the second sample replicate (n=~1370) will be invited to participate in the panel feasibility follow-up survey. The initial invitation to participants will be by letter, which will be mailed along with a \$2 token of appreciation. We will use addresses sampled for sample replicate 2 from the GENESYS system of Marketing Systems Group (MSG) - unless we received an updated address from the participant. We will also send the invitation by email for those participants who have provided a valid email address (84%).</p> <p>Non-response contact protocol:</p> <p>7 days after the initial invitation is mailed, participants will be contacted again by email (if available).</p> <p>14 days - we will send a further reminder by email or text message.</p> <p>21 days - email sent.</p> <p>28 days - paper copy of the survey along with a \$5 cash token to remaining non-responding participants.</p> <p>42 days - depending on the response rate we will telephone the participant to invite them to complete the follow-up survey.</p> <p>Participants will be mailed a \$10 check after completing the survey.</p> <p>This additional survey has been added to the existing AFHS MSMS project as an additional task. The existing task rules have been updated to include this data collection task but the non-response contact protocol will not be driven by task rules. We will manually change the status of the mail, text, email tasks as needed for relevant cases.</p> <p>Status:</p> <ul style="list-style-type: none"><li>• Currently testing the full process from opening the survey link to data being updated in MSMS.</li><li>• IRB amendment has been submitted and we have responded to requested changes following the first review.</li><li>• Sample address file has been provided to DataForce who will print the paper surveys, mail the initial invites, scan any returned paper surveys, deliver data to SRO and mail the final reminder letter with paper survey.</li></ul> <p>*****AFHS Non-response Follow-up*****</p> <p>The second additional component is to gather information, using open-ended interviews, from AFHS non-respondents, to better understand why people did not participate in the study.</p> <p>We identified the sampled addresses in AFHS Replicate 2 that: 1) did not respond to the screening invitation, 2) were located in Census Block Groups with more than 10% African-American or Hispanics, and 3) were in the top quartile of predicted probabilities of having a Spanish-speaker present. Then, based on the locations of available in-person interviewing staff from our organization, we sub-selected around 40 addresses from this list.</p>		

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)).

<b>SRO Project Period</b>	06/2022 - 09/2023
<b>Data Col Period</b>	06/2022 - 08/2022
<b>Security Plan</b>	NA
<b>Milestones</b>	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>

**Other Project Team Members** 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

<b>Other Project Name</b>	'A More Efficient Web-Based Approach to Collecting National Family, Fertility and Reproductive Health Data'.
<b>Sample Mgmt System</b>	MSMS; Project specific system (For non-response follow-up we will just use Excel.)
<b>Data Col Tool</b>	Blaise 5
<b>Hardware</b>	Paper and Pencil
<b>DE Software</b>	External vendor (Data Force)
<b>QC Recording Tool</b>	N/A
<b>Incentive</b>	Yes, R; Yes, Other (for non-response follow-up we will use a non-monetary incentive.)
<b>Administration</b>	SRO Group
<b>Payment Type</b>	Check, post (\$10); Other (Non-monetary incentive)
<b>Payment Method</b>	Check through other system (RPay (MSMS))

<b>Report Period</b>	July, 2023 (AFHS-Additional work)	Implementing
<b>Risk Level</b>	On Track	
<b>Monthly Updates</b>	July Update No further work is planned for this piece of the AFHS.	

Special Issues		
Cost as of Aug 08, 2023	Total Cost to Date (direct + indirect):	58,170.39
	Est Cost at Completion (E\$AC):	60,162.93
	Total Budget:	50,265.00
	Variance (Total Budget minus- E\$AC):	-9,897.93

**Reason for Variance:** AFHS Feasibility Pilot Estimate – Expanded SRO # 22-0037R01  
This piece of work is being funded by sequestering funds.  
Hours for Colette and I are projected to provide minimal support as needed (up to 6hrs/month) until Sept'23 which increases the amount to be covered by sequestering funds. I charged one hour in July and the ~\$350 credit was uncashed cheques (\$10) sent to respondents during the feasibility study last year.  
There is a total of \$850 in uncashed cheques that could be credited - the majority will be credited by end August but two were issued in early September and one in December(?).

<b>Projections as of Aug 08, 2023</b>	<b>Dollars Projected for Month:</b>	987.00
	<b>Actual Dollars Used:</b>	-411.44
	<b>Variance (Projected minus Actual):</b>	1,398.44
	<b>Reason for Variance:</b>	

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

Other Measures



Project Name	(ANES 2024) American National Election Studies - 2024		
Project Mode	Primary: Face to Face	Secondary: Web	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 4,558,724.00	Indirect Budget: 2,466,088.00	Total Budget: 7,024,812.00
Principal Investigator/Clients	Nicholas A. Valentino (University of Michigan)		
	Shanto Iyengar (Stanford University)		
	D. Sunshine Hillygus (Duke University)		
Funding Agency	National Science Foundation (NSF)		
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Andrew L Hupp		
	Budget Analyst: William Lokers		
	Production Manager:		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>The mission of the American National Election Studies (ANES) is to inform explanations of election outcomes by providing data that support rich hypothesis testing, maximize methodological excellence, measure many variables, and promote comparisons across people, contexts, and time. The ANES serves this mission by providing researchers with a view of the political world through the eyes of ordinary citizens.</p> <p>SRO will be conducting the 2024 data collection.</p>		
SRO Project Period	07/2023 - 01/2025		
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	Erin McSpadden - Project Manager for the methods pilot Sharon Parker - Production Manager for the methods pilot Raphael Nishimura - Sampling (pilot and production)		
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	Blaise 5; Other (PAPI)		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	N/A		
QC Recording Tool	Camtasia		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Check, post; Cash, post (\$25 (methods pilot) for each interview)		
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)		
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Report Period	July, 2023 (ANES 2024)		Planning
Risk Level	On Track		
Monthly Updates	<p>Work is currently focusing on preparation for the methods work this summer. The methods work includes doing two interviews ~4 weeks apart. The first interview is an in-person interview (n=~200). The second interview is a video interview conducted via Zoom (n=160). All interviews will be completed via a paper questionnaire to be developed by ANES project staff. No technical systems are being used for this work. There are two one-hour trainings planned prior to each interview. The first will be in August and the the second will be in September. The Pls would like the data collection complete prior to a board meeting in Austin, TX in mid-November.</p> <p>Field staff have been identified. We will have 12 interviewers. The one hour remote training via Zoom is scheduled for August 28. Equipment (laptop, cell phone, and headset) were shipped the week of 8/20.</p> <p>Sampling has purchased the sample (n=6,000) from MSG, created twelve replicates of 500 and assigned to the interviewers based on location. We will begin with a release of the first 2,500 cases (5 replicates).</p> <p>ANES staff delivered a paper questionnaire (a few days late) and respondent booklet. SRO reviewed and made</p>		

some modification and additions. They were reviewed by ANES staff and approved. ANES staff reviewed and modified the invitation letter SRO drafted. The examples they had previously given us were from the 2020 wave when there was no in-person work. They modified to be more in line with their 2016 letter.

EJ has a draft of the interviewer manual.

Andrew edited the questionnaire and drafted other interviewer related materials (coversheets, result code list, created separate respondent booklet, and production goals).

The ANES team provided an updated pilot design. At the conclusion of the first (in-person) interview we will be doing three things.

- 1) A connection test to show the respondent how easy it will be to participate
- 2) 50% of cases will be pre-paid the \$25 for the second (video) interview (receiving a total of \$50 (\$25 for first interview/\$25 for second interview) at the conclusion of the first interview). The other 50% will be paid after the video interview (either via check or Tango).
- 3) Schedule and appointment for the second (video) interview.

We've incorporated those items into the questionnaire and manual.

The materials are being set to be printed as of the writing of this. We hope to be able to start next week once the letters have been mailed.

<b>Special Issues</b>				
<b>Cost as of</b>	<b>Total Cost to Date (direct + indirect):</b>			0.00
	<b>Est Cost at Completion (E\$AC):</b>			0.00
	<b>Total Budget:</b>			7,024,812.00
	<b>Variance (Total Budget minus- E\$AC):</b>			0.00
	<b>Reason for Variance:</b>			Accounts were set-up in 7/26. Any ETs from July will be corrected in August. There won't be any costs on the report until next month.
<b>Projections as of</b>	<b>Dollars Projected for Month:</b>			0.00
	<b>Actual Dollars Used:</b>			0.00
	<b>Variance (Projected minus Actual):</b>			0.00
	<b>Reason for Variance:</b>			
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
<b>Other Measures</b>				

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

Other Project Team Members	Stephanie Chardoul (SPA) Piotr Dworak (Lead) Tony Romanowski (PM) Daric Thorne (PM/SSA) Barb Homburg (PM) Peggy Lavanger (PM) Jim McClure (DCS) Jeff Smith (tech lead) Jim Rodgers (MSMS consultant) Andrew Hupp (MSMS consultant) Pam Swanson (MSMS programmer) Kyle Kwaiser (Data Manager) Dave Dybicki (Blaise) Colette Keyser (Blaise) Tricia Blanchard (MSMS) Kyle Goodman (Help Desk)	
Other Project Name	HHICD Household Income and Childhood Development	
Sample Mgmt System	MSMS	
Data Col Tool	Blaise 5	
Hardware	Laptop; [UM cell] Phone	
DE Software	N/A	
QC Recording Tool	Other (to be specified)	
Incentive	Yes, R	
Administration	SRO Group	
Payment Type	Cash, prepaid (50)	
Payment Method	Check through other system (MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (MSMS)	
<hr/>		
Report Period	July, 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>As part of that effort, we are also planning to send a 5-year birthday postcard to the focal children - awaiting TCCU IRB approval.</p> <p>PI research team is also working on the Continuing Review from the TCCU IRB - UM IRB expiration is set for 10/11 and we need a continuation letter.</p> <p>Age 0 - 4 Update:</p> <p>SRO Interviewer effort was the main contributing factor allowing PI teams to reach and exceed the desired 80% response rate at the end of the study.</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 Aug 22, 2023	Total Cost to Date (direct + indirect):	7,466,378.00
	Est Cost at Completion (E\$AC):	8,602,568.41
	Total Budget:	7,837,861.73
	Variance (Total Budget minus- E\$AC):	-764,706.68
	Reason for Variance:	We continue to extend underrun mainly due to unutilized resources at all levels as other projects' priorities delay less-critical BFY developments and refinements. We expect that the underrun will decrease over the next few months.

Projections as of Aug 22, 2023	Dollars Projected for Month:	28,172.66
	Actual Dollars Used:	23,552.88
	Variance (Projected minus Actual):	4,619.78

Reason for Variance: We continue to see underrun due to lower iwer hours and underutilizing tech and project management time.

Measures		Units at Complete	RR	HPI
	Current Goal:	n/a	n/a	n/a
	Goal at Completion:	n/a	n/a	n/a
	Current Actual:	n/a	n/a	n/a
	Estimate at Complete:	n/a	n/a	n/a
	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		
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Report Period	July, 2023 (BHM Library Project)		Planning
Risk Level	Some Concerns		
Monthly Updates	We now have a pilot sample (n=600) and SRO is expanding our assistance to the PI by providing resources to identify library-specific contact (name, email) information for the selected sample (this is not in the SRO workscope, was specifically a research-team task in transmittal memo, however, PI team has not be able to muster the resources to start this work). August is when most of this work will take place as well as drafting the pilot questionnaire.		
Special Issues	See above.		
Cost as of Aug 08, 2023	Total Cost to Date (direct + indirect):	16,901.90	
	Est Cost at Completion (E\$AC):	182,810.35	
	Total Budget:	197,671.00	
	Variance (Total Budget minus- E\$AC):	14,860.65	
	Reason for Variance:	A	

Projections as of Aug 08,  
2023

Dollars Projected for Month:

16,737.36

Actual Dollars Used:

2,729.83

Variance (Projected minus Actual):

14,007.53

Reason for Variance:

Activity is below projected due to slow progress on project desiciions.

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

Other Measures

Project Name	(CAMS 2023) HRS 2023 Consumption and Activity Mail Study		
Project Mode	Primary: Mail      Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 347,895.00	Indirect Budget: 125,241.00	Total Budget: 473,136.00
Principal Investigator/Clients	David Weir		
Funding Agency			
IRB	HUM#: HUM00079949	Period of Approval: 11/4/2022-11/3/2023	
Project Team	Project Lead: Gloria J Baker		
	Budget Analyst: Cindy Tsao		
	Production Manager:		
	Senior Project Advisor: Evanthia Leissou		
	Production Manager 1: Jennifer C Arrieta		
	Production Manager 2:		
Proposal #	no data		
Description	CAMS is part of the Health and Retirement Study (HRS). The goal of CAMS is to gather additional data on household consumption and activities of daily living from participants in the HRS. In 2023, a paper questionnaire will be mailed to approximately 6,427 respondents of which 4,646 will receive the full questionnaire and 1,781 spouse/partners will receive a brief questionnaire.		
SRO Project Period	06/2023 - 05/2023		
Data Col Period	09/2023 - 04/2005		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 06/26/2023</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start: 09/29/2023</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End: 04/30/2024</div></div>		
Other Project Team Members	HRS Budget Analyst: Rick Krause Data Manager: Ed Green, Jennie Williams Programmer: Ashwin Dey Project Assistant: Melissa Luker		
Other Project Name	CAMS		
Sample Mgmt System	SurveyTrak		
Data Col Tool	SAQ		
Hardware	Paper and Pencil		
DE Software	Other (HRS study staff is responsible for)		
QC Recording Tool	N/A		
Incentive	Yes, R; Yes, Other (Spouse)		
Administration	SRO Group		
Payment Type	Check, prepaid (\$25 to main R and \$10 to spouse R)		
Payment Method	Check through STrak RPay System		
Report Period	July, 2023 (CAMS 2023)		Planning
Risk Level	On Track		
Monthly Updates	1. Coordinated timeline with DataForce with end of September initial questionnaire mailing date. 2. Worked with budget analyst on projections 3. Reviewed sample to assess which cases to mail survey and which to exclude status of cases in HRS 2022 4. Coordinated technical development timeline with programmers and data managers 5. Formatted questionnaires incorporating edits from client		
Special Issues			
Cost as of Aug 24, 2023	Total Cost to Date (direct + indirect):		3,357.59
	Est Cost at Completion (E\$AC):		470,796.16
	Total Budget:		473,136.00
	Variance (Total Budget minus- E\$AC):		2,339.84
	Reason for Variance:		The variance is primarily due to staff assigned to the project compared



to budgeted resources.

Projections as of Aug 24, 2023	Dollars Projected for Month:	4,326.29
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Actual Dollars Used:	3,357.59
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Variance (Projected minus Actual):	968.70
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Reason for Variance:	Minimal variance.
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Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:	3,471	59%	
	Current Actual:			
	Estimate at Complete:			
	Variance:			

Other Measures

Project Name	(Care & Help Study) Caregiving, Complex Family and Kinship Ties, and Alzheimer's Disease and Related Dementias (ADRD)		
Project Mode	Primary: Focus Group	Secondary: Cognitive IW	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 25,219.00	Indirect Budget: 2,017.00	Total Budget: 27,236.00
Principal Investigator/Clients	Sarah E. Patterson (University of Michigan - Survey Research Center)		
Funding Agency			
IRB	HUM#: HUM00237431	Period of Approval: 7/6/2023-7/31/2024	
Project Team	Project Lead: Margaret Lee Hudson		
	Budget Analyst:		
	Production Manager:		
	Senior Project Advisor: Lisa S Holland		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	Family and unpaid caregivers can influence the health and well-being of older adults through the care they provide and attitudes they hold about that care. However, the range of caregivers may extend beyond those most often captured in surveys (i.e. partners or adult children). Disadvantages may be especially present for older adults who have Alzheimer's Disease and Related Dementia (ADRD) who require more intensive and persistent care over time, and thusly rely on a more extended network of caregivers. This project seeks to enhance our understanding of diverse family and unpaid caregiver experiences and how this process may differ for those caring for an older adult living with dementia. This project will conduct focus groups with two groups of caregivers who help someone with memory issues, with 8 to 10 participants each.		
SRO Project Period	07/2023 - 07/2024		
Data Col Period	07/2023 - 07/2024		
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	Focus group phase (7/23-10/23): Margaret Hudson Cog IW phase (1/24-6/24): Margaret Hudson, TBD		
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Cash, post (\$60 focus groups; \$50 cognitive interview)		
Payment Method	Imprest Cash Fund from ISR Business Office		
Report Period	July, 2023 (Care & Help Study)		Initiation
Risk Level	On Track		
Monthly Updates	<p>July included planning time with the PI as well as the beginning of data collection. We revised the work scope for the focus groups, with the PI deciding to handle participant recruitment instead of SRO. The PI also decided to increase the length of the focus group from 60 to 90 minutes; increase the incentive from \$50 to \$65; and decrease the participants from 12 to 10. Our goal was to conduct the two focus groups for this project this summer, ideally between Art Fair and U-M student return, in order to make traffic/parking easier for participants. We identified one weekend day and one week night to conduct the two focus groups in late July/early August. The project lead identified an available location in Perry to conduct the focus groups and tested the audio system to confirm we could get quality audio recordings and transcripts. Perry 2300 was used due to its Zoom capabilities. The first focus group was conducted on Sunday, July 30 in the early afternoon for ease of parking. Zoom provided both the audio recording and transcript. The project lead set up an imprest cash fund and handled all respondent payments. The project lead handled hosting needs for the focus group. At her request, the PI and her undergraduate student assistant provided onsite support for the focus group including note taking, escorting respondents in the building, and handling informed consent paperwork.</p>		

Special Issues

Cost as of Jul 31, 2023	Total Cost to Date (direct + indirect):	612.28
	Est Cost at Completion (E\$AC):	26,623.72
	Total Budget:	27,236.00
	Variance (Total Budget minus- E\$AC):	0.00
	Reason for Variance:	
Projections as of Jul 31, 2023	Dollars Projected for Month:	612.28
	Actual Dollars Used:	612.28
	Variance (Projected minus Actual):	0.00
	Reason for Variance:	

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

Other Measures

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Project Name	(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: 1,338,017.70	Indirect Budget: 347,885.00	Total Budget: 1,685,902.70
Principal Investigator/Clients	Dr. Steven Broglio (U of M Kinesiology) Dr. Micheal McCrea /Dr. Pasquina (Medical College of Wisconsin/Uniformed Services Un) Dr. Thomas McAllister (Indiana University School of Medicine)		
Funding Agency	NCAA and DoD		
IRB	HUM#: 00202691	Period of Approval: 7/23/2021 - open	
Project Team	<b>Project Lead:</b> Donnalee Ann Grey-Farquharson <b>Budget Analyst:</b> Carl S Remmert <b>Production Manager:</b> Stacy Quisenberry <b>Senior Project Advisor:</b> Barbara Lohr Ward <b>Production Manager 1:</b> Hongyu Johnson <b>Production Manager 2:</b> Keith Liebetreu		
Proposal #	no data		
Description	<p>The project follows academy cadets post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure.</p> <p>This project has an overall SRO involvement period of 13 months, beginning March 2022, with data collection taking place over approximately 12 months starting mid-March 2022. SRO provides consultation, respondent locating activities and data collection for respondents in the uniformed services sample.</p> <p>The goal is to secure participation from approximately 3,200 unique past-CARE study participants. Participants will complete a study assessment once over the 13-month project period. SRO decentralized field interviewers locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct approximately 1,425 telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.</p> <p>The estimate total cost for the overall scope of work is \$1,426,001.00. This includes \$1,131,747.00 direct and \$294,254.00 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders).</p>		
SRO Project Period	02/2022 - 03/2023		
Data Col Period	03/2022 - 02/2023		
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
Other Project Team Members	Donnalee Grey-Farquharson, Stacy Quisenberry, Hongyu Johnson, Keith Liebetreu, James Koopman, Minako Edgar, David Ackuaku, Carl Remmert		
Other Project Name	CARE-CSI Military		
Sample Mgmt System	Other (non-SRO)		
Data Col Tool	Other (non-SRO)		
Hardware	Laptop; [UM cell] Phone		
DE Software	N/A		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	Other (Kinesiology)		
Payment Type	Check, post (\$150)		
Payment Method	Other (Kinesiology)		
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Report Period	July, 2023 (CARE Military)		Implementing
Risk Level	On Track		
Monthly Updates	1. Project Management: SRO has been informed by the PI team that one participating university is now moved to the civilian site from the		

military site. As a result, SRO is working with QG on balancing the sample and handling samples in the sample management system.  
SRO continued to participate in weekly project management meetings with the research team.  
Revised monthly projections and staffing plan.  
SRO has been waiting for data on Social Media platforms performance from QG in order to evaluate the efficiency of using them. Donnalee will follow up with them.

2. Care SMS system update:

SRO interviewers still encountered issues with registration and screening process. We continues to work with QG to resolve CP loading errors and ways to handle inbound texts within the system.  
SRO requested QG to make changes to System Email based on interviewers' suggestions. The updated changes helped them to refer to the email contents correctly with the respondents.

3. Questionnaire Development – N/A

4. Production:

SRO received 1 new sample releases in July with a total of 4102 cases. The Military data collection will be ending at the end of August 2023.

SRO is planning a production challenge event to prioritize military samples and boost the field productivity before the end of August.

SRO has been working with the PI team on handling TOA issues.

Production Stats as of 07/31/2023:

Total Released Cases: 7689: Total Comp lws-175 – 2.3% (Web-174 -2.3%, CATI-0.00%)

5. Hiring and Training – N/A

6. DMSS:

SRO DM is working on the Target Group reports.

7. Locating:

The Locating team continues to use the full spectrum of messages approved by IRB to communicate with the respondents despite of experiencing some system issues in Twitter account. The locators worked 150 lines, found 13 Respondents and were able to generate 2 iw's from finds. There ae 245 civilian and 187 military locating lines. There are a total of 80 finds in DCP3 and 13 completed from locating.  
Civilian find rate: 13%

**Special Issues**

<b>Cost as of Jul 31, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>	1,485,279.04
	<b>Est Cost at Completion (E\$AC):</b>	1,600,731.30
	<b>Total Budget:</b>	1,685,902.70
	<b>Variance (Total Budget minus- E\$AC):</b>	85,171.40
	<b>Reason for Variance:</b>	SRO received NCAA fund of \$259,901.17 to continue military data collection beyond May 2023. Military work will end at the end of August. We will focus on the Military work to boost production in order to use the remaining Military fund efficiently.

<b>Projections as of Jul 31, 2023</b>	<b>Dollars Projected for Month:</b>	48,879.63
	<b>Actual Dollars Used:</b>	43,354.44
	<b>Variance (Projected minus Actual):</b>	5,525.19
	<b>Reason for Variance:</b>	Although we received more samples in July, interviewers still spent less hours on Military project than we projected.

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

**Other Measures**

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

Payment Method	Check through other system (UM)			
Report Period	July, 2023 (CARE SALTOS MTEC)		Implementing	
Risk Level	On Track			
Monthly Updates	<p>1. Project Management: SRO has been informed by the PI team that one participating university is now moved to the civilian site from the military site. As a result, SRO is working with QG on balancing the sample and handling samples in the sample management system. SRO continued to participate in weekly project management meetings with the research team. Revised monthly projections and staffing plan. SRO has been waiting for data on Social Media platforms performance from QG in order to evaluate the efficiency of using them. Donnalee will follow up with them.</p> <p>2. CARE SMS system update: SRO interviewers still encountered issues with registration and screening process. We continues to work with QG to resolve CP loading errors and ways to handle inbound texts within the system. SRO requested QG to make changes to System Email based on interviewers' suggestions. The updated changes helped them to refer to the email contents correctly with the respondents.</p> <p>3. Questionnaire Development –N/A</p> <p>4. Production: SRO received 2 new sample releases in July with a total of 5511 cases. SRO is planning a production challenge event to boost the field productivity in the upcoming month. SRO has been working with the PI team on handling TOA issues. Production Stats as of 07/31/2023: Total Released Cases: 8022: Total Comp lws-218 – 2.7% (Web-217 -2.7%, CATI-1-0.00%)</p> <p>5. Hiring and Training – N/A</p> <p>6. DMSS: SRO DM is working on the Target Group reports.</p> <p>7. Locating: The Locating team continues to use the full spectrum of messages approved by IRB to communicate with the respondents despite of experiencing some system issues in Twitter account. The locators worked 150 lines, found 13 Respondents and were able to generate 2 iw's from finds. There ae 245 civilian and 187 military locating lines. There are a total of 80 finds in DCP3 and 13 completed from locating. Civilian find rate: 16%</p>			
Special Issues				
Cost as of Jul 31, 2023	Total Cost to Date (direct + indirect):		1,278,075.38	
	Est Cost at Completion (E\$AC):		4,751,944.71	
	Total Budget:		4,685,914.00	
	Variance (Total Budget minus- E\$AC):		141,111.11	
	Reason for Variance:		We made necessary projection adjustments based on past month actual cost and projections. We also focused on the transfer of interviewer hours from Civilian to Military in order to reduce overrun of Civilian and making sure to efficiently use the remaining Military funding by the end of August.	
Projections as of Jul 31, 2023	Dollars Projected for Month:		101,971.54	
	Actual Dollars Used:		78,868.74	
	Variance (Projected minus Actual):		23,102.81	
	Reason for Variance:		Iwers used less hours than projected in July.	
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(CCS) Community College Survey		
Project Mode	Primary: Web      Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 560,774.00	Indirect Budget: 84,115.00	Total Budget: 644,889.00
Principal	Hana Lahr (Teachers College, Columbia University)		
Investigator/Clients	Veronica Minaya (Teachers College, Columbia University)		
	Rachel Baker (University of Pennsylvania)		
Funding Agency	Ascendium Education Group		
IRB	HUM#: 00237400	Period of Approval:	
Project Team	Project Lead: Jeffrey Albrecht Jr		
	Budget Analyst: William Lokers		
	Production Manager:		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1: Rebecca Loomis		
	Production Manager 2: Steven Sonoras		
Proposal #	no data		
Description	The CCS seeks to understand factors that influence first year community college students in their program choice. We will survey a selection of students entering a community college for the first time in the fall of 2023 and then follow up with them in the second semester (Spring 2024) and their third semester (Fall 2024). The researchers will recruit 4 community colleges to participate.		
SRO Project Period	01/2023 - 03/2025		
Data Col Period	10/2023 - 11/2024		
Security Plan	NA		
Milestones	<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	Marsha Skoman - Qualtrics Programmer Ed Green - Data Manager Hueichun Peng - Web SMS Programmer		
Other Project Name	How Community College Students Choose Programs of Study		
Sample Mgmt System	Web SMS		
Data Col Tool	Other (Qualtrics)		
Hardware	NA		
DE Software	NA		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Other (Visa electronic gift cards)		
Payment Method	Other (VISA eGift cards)		
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Report Period	July, 2023 (CCS)		Implementing
Risk Level	On Track		
Monthly Updates	The pilot study was delayed from 7/6 to 7/13, because the TCCU IRB was not able to approve in time. Nine students completed web surveys, six of whom also completed interviews. The survey performed well in Qualtrics, and respondents said it was comprehensive and easy to understand. CCS began holding weekly tech team meetings and have been reviewing timelines and projections. Hueichun and Ed will begin their work on the project in October for Wave 2 pre-production. Marsha mostly completed programming the English survey in Qualtrics. Becky and Steven worked on lining up testing, gift card orders, and Spanish translation services.		
Special Issues	U-M HSBS IRB has approved the project with contingencies, because they needed the approved study protocol from the TCCU IRB. We have submitted the approved protocol and are just waiting for our IRB to lift the contingencies.		
Cost as of Aug 23, 2023	Total Cost to Date (direct + indirect):		26,764.29
	Est Cost at Completion (E\$AC):		644,462.90
	Total Budget:		644,889.00



<b>Variance (Total Budget minus- E\$AC):</b>		426.10		
<b>Reason for Variance:</b>		We are still in the early phase of the project and will have better estimates once we start production and get through Wave 1 this fall.		
<b>Projections as of Aug 23, 2023</b>	<b>Dollars Projected for Month:</b>	15,576.94		
	<b>Actual Dollars Used:</b>	11,631.51		
	<b>Variance (Projected minus Actual):</b>	3,945.43		
<b>Reason for Variance:</b>		Budget funds were initially distributed evenly across the project duration, but effort will be higher around production. So we expect to have more accurate projections once we get production going.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
<b>Other Measures</b>				

Project Name	(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	<b>Project Lead:</b> Gary Hein <b>Budget Analyst:</b> David Kellermeyer <b>Production Manager:</b> <b>Senior Project Advisor:</b> Rebecca Gatward <b>Production Manager 1:</b> Rebecca Loomis <b>Production Manager 2:</b>		
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> <div> <b>Pre Production Start:</b> 01/17/2023   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> 08/15/2023 </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b> 06/28/2023   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
Other Project Team Members	Gary Hein - Project Lead Rebecca Gatward - SPA Rebecca Loomis - Project Manager Davis Kellermeyer - Budget Analyst Wen Chang - Stats lead Ji Qi - Statistician Laura Yoder - Data Manager		
Other Project Name	Transitions in Daily Motives for Cannabis Use and Their Associations for Longer-Term Use Behaviors		
Sample Mgmt System	Other (Manual)		
Data Col Tool	Other (Qualtrics)		
Hardware	[UM cell] Phone		
DE Software	N/A		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Other (Tango Code)		
Payment Method	Other (E-mail via Tango)		
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Report Period	July, 2023 (DCUS)		Implementing
Risk Level	On Track		
Monthly Updates	July activities:  1- Meetings with PIs and SRO team to discuss project updates and fielding/recruitment plans. 2- Monitored recruitment of respondents via MICHHR database. Project was actively recruiting from 6/27 to 7/27. 3- Sent screener survey to prospective respondents which matched our recruiting plan. 4- Send screener data to PIs 5- Worked with Qualtrics support to troubleshoot texting errors starting on 7/26		

<b>Special Issues</b>	Qualtrics' SMS carrier was blocking any text messages that contained the word 'Cannabis.' Problem was discovered on 7/26, and persisted well into August.			
<b>Cost as of Aug 14, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>	21,016.81		
	<b>Est Cost at Completion (E\$AC):</b>	33,781.60		
	<b>Total Budget:</b>	49,742.00		
	<b>Variance (Total Budget minus- E\$AC):</b>	15,960.40		
	<b>Reason for Variance:</b>	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.		
<b>Projections as of Aug 14, 2023</b>	<b>Dollars Projected for Month:</b>	3,693.89		
	<b>Actual Dollars Used:</b>	2,828.74		
	<b>Variance (Projected minus Actual):</b>	865.15		
	<b>Reason for Variance:</b>	\$1000 in respondent incentives will not hit until next month. Survey Director hours exceeded projections due to vacation coverage.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>	50 Baseline, 38 othr	100% Bsln, 75% Other	
	<b>Goal at Completion:</b>	50	50	
	<b>Current Actual:</b>	43	86%	
	<b>Estimate at Complete:</b>	50	100%	
	<b>Variance:</b>	0		
<b>Other Measures</b>	Baseline fielding in August, with daily surveys and follow-up instrument after that.			

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

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

**Other Project Name**

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

<b>Report Period</b>	July, 2023 (ECHO (Year 7))	Implementing
<b>Risk Level</b>	On Track	
<b>Monthly Updates</b>	SRO ECHO data collection has concluded and all charges should be made by the end of August. However, we will likely continue MPR through September as final August biweekly costs will hit in the September cost report.  [Phase 1: Recruitment and Prenatal Surveys]  The MARCH recruitment target was 1,110 mothers / live births. Recruitment is done and the final count is 1,113. ----- Prod Stats as of 8/29/23 [Phase 2: 3-Month Data Collection]  3-month sample released: 1090 3-month interviews completed: 794 Average attempts / lw: 7.6 lw length: 37 min Response Rate: 74% 3-month biospecimen collected: 457 ----- [Phase 3: Age 4 REDCap Survey]  Age-4 sample released: 417 REDCap surveys completed: 297 Response Rate: 71% ----- [Phase 3: Age 4 In-Person Visit Protocols]  Age-4 IPV sample released: 236 In-person visits completed: 80 Response Rate: 35% (However, 12 more IPV iws were completed in Y7 than budgeted)	

**Special Issues**

<b>Cost as of Aug 22, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>	474,844.41
	<b>Est Cost at Completion (E\$AC):</b>	517,485.46
	<b>Total Budget:</b>	525,576.00
	<b>Variance (Total Budget minus- E\$AC):</b>	8,090.54
	<b>Reason for Variance:</b>	Various small variances contributed to the falling total, projected cost. Overall, the most significant driver of the projected underrun is all tech (across may titles). Some tech hours were also reduced as they were

reserved for end of study wrap up work that was ultimately not as time-consuming as projected.

Projections as of Aug 22, 2023	Dollars Projected for Month:	49,292.83
	Actual Dollars Used:	42,555.41
	Variance (Projected minus Actual):	6,737.42

Reason for Variance: Respondent Payments and lwer hours were both significant drivers of the monthly variance.

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

Other Measures

Project Name	(EDC-Endline) Every Dollar Counts Endline		
Project Mode	Primary: Telephone	Secondary: Face to Face	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 2,382,700.00	Indirect Budget: 714,811.00	Total Budget: 3,097,511.00
Principal	Stephanie Chardoul (SRO)		
Investigator/Clients	Sarah Miller (Ross Business School)		
Funding Agency			
IRB	HUM#: HUM00164105	Period of Approval: 12/23/2022-12/23/23	
Project Team	Project Lead: Karin Schneider		
	Budget Analyst: Christine Evanchek		
	Production Manager: Barbara Aghababian-Homburg		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Karin Schneider		
	Production Manager 2: Donnalee Ann Grey-Farquharson		
Proposal #	no data		
Description	<p>The overall project is funded by a consortium (currently consisting of both OpenResearch Lab (Open) and NIH. OpenResearch Lab (Open) (formerly Y Combinator Research) and the principal investigators are conducting an evaluation of Every Dollar Counts, a cash assistance gift program being administered by two non-profit organizations: CitySquare, based in Dallas, Texas, and Heartland Alliance, located in Chicago, Illinois (the Community Partners).</p> <p>The purpose of this study is to explore how the program affects multiple dimensions of recipients' lives. Key outcomes of interest include health, subjective and material well-being, time use, financial health, labor market participation, social and civic engagement, and effects on children. SRO concluded the Baseline interviews in 2020, and the Midline interviews in July 2022. The EDC Endline project will reach out to all Baseline respondents for completion of a telephone interview, followed by an in-person interview (with cognitive tasks, anthropometric measurements and collection of dried blood spots) for those respondents still in the greater Chicago area or greater Dallas/Ft. Worth area. Data collection will take place between March 2023 and late September 2023. SRO assumes approximately 91% of the 2,990 Baseline respondents are located and willing to be interviewed again (2,720 90-minute telephone interviews). SRO assumes that in-person interviews will be completed with 2,003 respondents still living in the greater Chicago or Dallas/Ft. Worth and Waco area. About 400 respondents are known to currently reside outside of these areas; these respondents will not be asked to complete an in-person interview. The in-person interviews will include collection of consent for administrative data collection, collection of Social Security number, completion of self-administered on-line cognitive assessments, collection of blood pressure, height, weight, and dried blood spots. We assume that 1,957 respondents will participate in the dried blood spot collection. Following collection of the dried blood spots, SRO interviewers will package and ship the dried blood spot cards to the laboratory chosen by ORL.</p> <ul style="list-style-type: none"><li>• Our budget assumes up to 2,720 telephone interviews are completed and allows for at least six telephone attempts on all non-resistant cases with working telephone numbers. SRO will track and monitor contact attempts to examine the efficacy of contact windows in the first replicate of the sample.</li><li>• The budget assumes approximately 2,003 cases complete the in-person component and 1,957 consent to the DBS collection.</li><li>• Mileage costs for fieldwork are budgeted at 2,003 trips of no more than 120 miles per round trip.</li><li>• Cash incentives of \$15,000 are included in the budget estimate to facilitate in-person payments to reluctant and hard-to-reach participants and individuals who are asked to assist in the location of these participants. All other participant incentive payments are the responsibility of Open.</li><li>• Supplies/kits for DBS are included in the estimate consistent with our most recent project experience. Further discussion with the University of Washington laboratory may result in the refinement of the materials and method for drying the bio specimens and associated costs of project supplies.</li></ul> <p>SRO will conduct standard data cleaning and produce a preliminary and final dataset with documentation. Standard data cleaning does not include customization (such as derived variable or index creation, dataset merging, sample weighting, recoding, or coding of other-specify responses). We will ensure that all components of a case are present with a reference variable (SID, OID) to allow for merging and data analysis. Our main documentation is conveyed through data dictionaries and a questionnaire codebook.</p> <p>We have not budgeted for coding any open-ended responses.</p> <p>Deliverables:</p> <ul style="list-style-type: none"><li>• SRO will provide daily, automated delivery of questionnaire data, cognitive tasks, and sample management system data for cases with a final disposition and sample management system data for all cases that have been released to interviewers.</li><li>• Sample management data that will be delivered daily to Open will include the following case-level variables:<ul style="list-style-type: none"><li>o Contact attempts</li><li>? number by type (SMS, phone, email, in-person)</li><li>? date/time of last attempt</li><li>o Appointments</li><li>? date/time of scheduled appointments</li><li>? occurrence of broken / missed appointments</li><li>? how appointment was made (self-scheduler/by interviewer)</li><li>o Current incentive assigned to the sample line</li><li>o SRO will work with Open during pre-production to finalize variables and format.</li></ul></li><li>• We will work with Open between completion of active data collection and end of the funding period for Endline to reconcile any outstanding discrepancies in the data.</li><li>• SRO will also deliver:<ul style="list-style-type: none"><li>o Daily data collection progress reports</li><li>o A final summary of field methods at the end of data collection</li><li>o A full survey dataset with all participant contact information at the close of data collection.</li></ul></li></ul>		

SRO Project Period	01/1996 - 01/1996			
Data Col Period				
Security Plan	NA			
Milestones	<div><div><div>Pre Production Start: 09/01/2022</div><div>Pretest End:</div><div>Staffing Complete: 02/27/2023</div><div>SS Train Start: 03/20/2023</div><div>DC Start: 03/27/2023</div></div><div><div>Pretest Start:</div><div>Recruitment Start: 02/01/2023</div><div>GIT Start:</div><div>SS Train End: 03/24/2023</div><div>DC End: 08/19/2023</div></div></div>			
Other Project Team Members	In addition to the above: Ian Ogden (SSS, Tech Coordinator); Anna Fuqua-Smith (SSI); Austin De Spirito (SSA); Jeff Smith (Tech Lead); Marsha Skoman (SurveyTrak); Heuchun Peng and Shaowei Sun (Self-Scheduler); Peter Sparks & Kelly Liesko (Blaise); Stephanie Windisch and Jennie William (Data Management); Ashwin Dey and Darnell Franklin (Webtrak, Weblog, Reports)			
Other Project Name				
Sample Mgmt System	SurveyTrak; Project specific system (Self-Scheduler for Telephone)			
Data Col Tool	Blaise 4.8; Other (ArcGIS - Survey 123)			
Hardware	Laptop; [UM cell] Phone			
DE Software	N/A			
QC Recording Tool	DRI-CARI			
Incentive	Yes, R; Yes, INF			
Administration	SRO Group; Other (PI Payment)			
Payment Type	Cash, post (\$10 or \$20 For Dried Blood Spots); Other (\$20 Finders Fee)			
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)			
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Report Period	July, 2023 (EDC-Endline)		Implementing	
Risk Level	On Track			
Monthly Updates	Over 130 cases visited in-person (only one case actually interviewed face-to-face) so far and some lines have two visits, per PI requests. Interviewing slowed as July progressed, but we surpassed the 95% response rate overall with small percentage point difference in control and treatment groups' response.			
Special Issues	None			
Cost as of Aug 08, 2023	Total Cost to Date (direct + indirect):		1,072,074.45	
	Est Cost at Completion (E\$AC):		1,338,037.15	
	Total Budget:		3,097,511.00	
	Variance (Total Budget minus- E\$AC):		1,759,473.85	
	Reason for Variance:		see previous months' information -- long-standing underrun continues to grow as we narrow projections at the end of the fieldwork	
Projections as of Aug 08, 2023	Dollars Projected for Month:		168,051.86	
	Actual Dollars Used:		114,991.73	
	Variance (Projected minus Actual):		53,060.13	
	Reason for Variance:		Continued higher interviewing efficiency	
Measures		Units at Complete	RR	HPI
	Current Goal:	2800	97	3.0
	Goal at Completion:	2850	97	3.0
	Current Actual:	2840	95	2.8
	Estimate at Complete:	2850	97	2.8
	Variance:			
Other Measures				



Project Name	(HART) Health, Aging, and Retirement in Thailand (HART) - SRO consultation (2023)		
Project Mode	Primary: Not Available		
Project Type	Sponsored Projects		
Budget	Direct Budget: 55,460.00	Indirect Budget: 16,083.00	Total Budget: 71,543.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#: NA	Period of Approval:	
Project Team	<b>Project Lead:</b> Nicole G Kirgis <b>Budget Analyst:</b> Dean E Stevens <b>Production Manager:</b> <b>Senior Project Advisor:</b> <b>Production Manager 1:</b> Rebecca Gatward <b>Production Manager 2:</b>		
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"> <li>- consultation on the preparation of technical systems for wave 5 - including liaising with Statistics Netherlands on licensing and the use of Blaise,</li> <li>- assisting with training on sample design and implementation and sample weighting, including handling attrition and</li> <li>- consult and training on data management, specifically managing the data structure of panel data and preload. Two 'learning by doing' training trips will take place. Trip one: U-M Team to Hart (April 2023) involving a SRO data manager and Blaise programmer will travel to Thailand to work with the HART team.</li> </ul> <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> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
Other Project Team Members	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		
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Report Period	July, 2023 (HART)		Implementing
Risk Level	On Track		
Monthly Updates	July Draft agenda created and provided to Pailin (HART project manager) for review. The agenda covers the topics they were expecting. She requested that we have a meeting to discuss data collection software options prior to their visit		

so she had some time to consult the HART PIs and gather their input.

Special Issues

Cost as of Aug 11, 2023	Total Cost to Date (direct + indirect):		25,694.23
	Est Cost at Completion (E\$AC):		63,932.19
	Total Budget:		71,543.00
	Variance (Total Budget minus- E\$AC):		7,610.81
	Reason for Variance:	The main source of the underrun is lower than projected travel costs for the SRO visit to the HART team in April (Jennie and Karl) \$10k estimated and actual costs were \$4,500. Salary projections have been updated now that the agenda is almost final.	

Projections as of Aug 11, 2023	Dollars Projected for Month:		3,881.31
	Actual Dollars Used:		1,704.37
	Variance (Projected minus Actual):		2,176.94
	Reason for Variance:	Salary costs were around half what was projected for July -	

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> Pre Production Start: 04/01/2022  Pretest End: 05/21/2020  Staffing Complete:  SS Train Start: 07/13/2022  DC Start: 07/18/2022 </div> <div> Pretest Start: 05/01/2020  Recruitment Start:  GIT Start:  SS Train End: 07/15/2022  DC End: 10/31/2023 </div> </div>		
Other Project Team Members	PDMG: Tony Romanowski, Lisa VanHavermaet, Megan Hromco, Kristen Cross. TSG: Jeff Smith, Brad Goodwin, Valyn Dall, Peter Sparks, Ashwin Dey, Deb Wilson		
Other Project Name	Harmonized Cognitive Assessment Protocol		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone		
DE Software	Blaise 4.8 BIA		
QC Recording Tool	NA		
Incentive	Yes, R; Yes, INF		
Administration	NA		
Payment Type	Check, prepaid (50); Cash, post (25)		
Payment Method	Check through STrak RPay System		
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Report Period	July, 2023 (HCAP 2022)		Implementing
Risk Level	On Track		
Monthly Updates	<p>HCAP production has been underway for 57 weeks. As of this morning, 4,852 interviews have been completed, including 2,592 R and 2,260 Inf. There are currently 135 appts (84 R, 51 Inf). The overall HPI is 4.71. 342 Spanish interviews have been completed (202 R, 140 Inf).</p> <p>Count and RR goals have been updated to reflect another 4 week extension through November. We are still approved for a 190k direct cost overrun and the PIs have identified additional funds should they be needed. It is doubtful we will need these, as we are currently only 167K direct over. We expect to exceed the originally agreed upon 64% overall RR with 5,398 completed lws (2,901R &amp; 4,297Inf). The new goals are an overall final RR of 67% (70% R &amp; 65% Inf) with a total of 5,631 completed iws (2,988 R &amp; 2,653 Inf). We expect to meet these goals keeping lws hours up through the end of production. When HRS ends production next week, we will know the final HCAP sample count.</p> <p>156 new sample lines will be released into the field on 8/28. We expect to release sample once more after that</p>		

once HRS is closed.

We have been closely monitoring subgroup RRs, including Proxy, Black, and Hispanic. We will start outlier trips soon, as well as increase R and Inf incentives for these groups in an attempt to boost RRs.

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 Aug 22, 2023	Total Cost to Date (direct + indirect):			3,738,551.75
	Est Cost at Completion (E\$AC):			4,715,659.21
	Total Budget:			4,488,000.00
	Variance (Total Budget minus- E\$AC):			-227,659.21
	Reason for Variance:			There was a budget cap in 2020 while goals remained at high level, project has stretched 2 additional years with low level of management, inflation since budget created in 2018. The PI has approved a direct cost overrun of \$190,000.
Projections as of Aug 22, 2023	Dollars Projected for Month:			273,490.19
	Actual Dollars Used:			224,517.89
	Variance (Projected minus Actual):			48,972.30
	Reason for Variance:			Respondent costs not all used this month, pushed forward, plus Ann Arbor staff did not charge all projected hours.
Measures		Units at Complete	RR	HPI
	Current Goal:	4859		4.8
	Goal at Completion:	5641	67% (overall)	4.8
	Current Actual:	4852	63%	4.71
	Estimate at Complete:	5641	69%	4.8
	Variance:			
Other Measures	lw counts include R + Inf. Final RR for Rs is expected to be 70% and final Inf RR to be 64% (67% overall).			

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)		

<b>Report Period</b>	July, 2023 (Health and Well Being in SE MI)	Implementing
<b>Risk Level</b>	Attention!	
<b>Monthly Updates</b>	<p>NOTE: The projects are not projecting an overrun - we assume scope will be reduced to fit within available budget.</p> <p>D-Amp interviewing &amp; screening is very, very slow due to excessively high attrition and low productivity among the interviewers. Hours per screen is very high compared to the budget, travel per household is also very high. Eligibility is lower than budgeted. We are presenting a number of options to the research team including increasing the TOA and bringing on experienced interviewers.</p> <p>While we have some savings in some areas (training, recruitment) due to high attrition, we will need to add more interviewers in order to keep production going. Programming is well over budget due to the complexity of the instruments an unanticipated problems trying to bring the 2019 instruments back on-line.</p>	

During July 2023, SRC activities on the DAWN projects included the following:

#### Task 1: Management, Budget and Work Plan

- Held meetings with the DAWN research team to discuss study planning, budget, scope and schedule for D-Amp and SRS.
- Financial
  - o Prepared cost reports and reviewed monthly expenses.
  - o Finalized projections and entered them into the cost reporting system
- Technical systems & Questionnaires
  - o Updated and finalized Arabic main questionnaire and respondent booklet, Arabic Informant questionnaire and respondent booklet.
  - o Conducted repeated rounds of testing on all instruments and on the sample management systems
  - o Continued updates to English Proxy questionnaire specification. Began updating Arabic proxy questionnaire specification.
  - o Finalize specification for logging program
- July Training preparation
  - o Finalized study-specific training agenda for team leader training, train-the-trainer, and interviewer training.
  - o Updated powerpoint presentations and pre-study training on Canvas.
  - o Finalized updates to project manual.
- Production
  - o Printed materials for Arabic training
  - o Revised concerns letters (English), created new concerns letters for issues arising during interviewing
  - o Triaged and completed one mandated report related to SRS production.

#### Task 2: Sampling

- Adjusted dashboards for production monitoring, worked on interviewer-level performance dashboards

#### Task 3: Questionnaire Development

- See Task 1 for activities completed by the management team
- Conducted repeated rounds of testing on all instruments

#### Task 4: CAI Programming

- Conducting iterative programming/testing on Arabic instruments.
- Began programming of proxy instrument
- Modified programming of screener

#### Task 5: Systems Programming

- Conducted continued rounds of testing/bug fixes to all sample management instruments
- Began programming formal logging program

#### Tasks 6, 7: Interviewer Recruitment & Hiring, Training

- Facilities
  - o Finalized contract for July training
  - o Conducted outreach to facility to update specifications for audio visual equipment for July training
- Processed personnel paperwork for interviewers who left from (resigned from) the May training cohort
- Interviewer recruitment for July
  - o Made offers to additional selected candidates, processed hiring paperwork and requested background checks.
  - ? 46 interviewers hired for July, including 4 certified bilinguals (2 additional not yet certified).
  - ? Processed paperwork for interviewers who did not show for training, or who left during training.
- Interviewer Training
  - o Conducted team leader training for 3 new team leaders July 11, 12, 13 (virtual) and July 17, 18 (in person)
  - o Conducted general interviewing techniques training July 17 and 18
  - o Conducted study specific training July 18-16
  - ? 27 fully certified interviewers (2 bilinguals), 3 certified for screening only
  - o Shipped cognition & saliva kits to newly certified interviewers

#### Task 8: Main Data Collection

- Responded to incoming email from respondents, logged returned mail
- Logged/checked returned cognition packages
- Fulfilled supply requests from field
- Conducted quality assurance on completed interviews; provided feedback to interviewers.
- Released 3205 new sample lines to the field; mailed prenotification letters with \$2 token
- Through July 31, 2023:
  - o Screener Completions:
    - High MENA Low MENA
  - Selected for D-Amp 37 0
  - Selected for SRS 16 177
  - Eligible, Not Selected 305 0
  - Not Eligible 22 38
  - Non-Sample 1 12

- o D-AMP – 2 completed main interviews, 1 completed informant interview
- o Social Relations – 77 completed interviews, 1 non-interview (language barrier)

#### Task 9: Post Collection Processing

- No activity this month

#### Task 10: Weighting

- No activity this month

#### Task 11: Final Data Deliverables

- Prepared specification for interim data deliverables
- Prepared interim data for SRO team review; reviewed data and made adjustments

## Special Issues

### Areas Needing Special Attention

- Production Interviewing – production screening and interviewing continues to proceed more slowly than anticipated due to a lower number of interviewers completing training and lower than anticipated hours being worked by interviewers. Hours per screener, hours per interview remain significantly higher than budgeted.
  - o The production management team is actively working with interviewers to ensure they work the required number of hours and work sample lines efficiently and effectively.
  - o Participation in saliva collection is higher than anticipated (currently about 85%). While it is still too early to make predictions about the entire study, this is an area to watch as it could result in higher costs due to the need to order more supplies, and on the research side, pay for more samples to be processed.
- Financial:
  - o Projections currently assume that the projects will work within the budget allocated. We are not projecting overruns, but rather assuming that scope will be reduced to fit within the budget.
  - o SRO is monitoring interviewing costs. As noted above hours per completed screener and hours per interview are running higher than budgeted.
  - 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 is still experiencing significant attrition both before and after training. This is slowing the pace of production. 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.
  - o The project hired 46 interviewers for the July training, however only 32 presented at training. Two additional interviewers left during training. 27 interviewers were certified for full interviewing, with 3 certifying for screening only.
  - o The project hired 28 interviewers for the May training. 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 to start production.
  - o As of 8/22, from the May training – 12 interviewers remained on staff (10 fully certified, 2 screeners, 3 bilinguals); from the July training – 27 interviewers on staff (24 fully certified, 3 screeners, 3 bilinguals)
- Schedule
  - o Programming is running behind schedule due to issues noted above.
  - ? Priority is being given to launching the screener (English & Arabic), and the main survey, physical measures and cognition sections in English, as well as the informant questionnaire in English.
  - ? The Arabic version of the main questionnaire, informant interview launched on August 15.
  - ? The proxy English questionnaire is being programmed (Aug 2023). The proxy Arabic questionnaire needs some translation.

<b>Cost as of Aug 22, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>	1,679,694.03
	<b>Est Cost at Completion (E\$AC):</b>	3,758,124.90
	<b>Total Budget:</b>	3,758,127.00
	<b>Variance (Total Budget minus- E\$AC):</b>	2.10
	<b>Reason for Variance:</b>	We are not projecting an overrun, rather we are assuming that the work scope will be reduced to fit within the available budget.
<b>Projections as of Aug 22, 2023</b>	<b>Dollars Projected for Month:</b>	269,686.15
	<b>Actual Dollars Used:</b>	148,177.05
	<b>Variance (Projected minus Actual):</b>	121,509.10
	<b>Reason for Variance:</b>	Costs associated with interviewing (travel, respondent payments, interviewer salary) are all lower than anticipated due to interviewer attrition and the very slow pace of production.

Measures		Units at Complete	RR	HPI
	<b>Current Goal:</b>	930 Main, 930 inform	varies	11.7 w/screen, inf
	<b>Goal at Completion:</b>	930 Main, 930 inform		
	<b>Current Actual:</b>	14 Main, 10 inform		90.6 per hh
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			

**Other Measures** 60% screening cooperation rate, 6516 new sample lines for 600 completes (note ~400 more sample lines drawn).

Project Name	(HRS 2022 Panel & Baselines) Health and Retirement Study 2022 Main Interviews		
Project Mode	Primary: Mixed      Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	Direct Budget: 13,982,815.00	Indirect Budget: 5,033,815.00	Total Budget: 19,016,630.00
Principal Investigator/Clients	David Weir (ISR-SRC)		
Funding Agency			
IRB	HUM#: HUM000611128	Period of Approval: 6/7/2023-6/6/2024	
Project Team	Project Lead: Evanthia Leissou		
	Budget Analyst: Richard Warren Krause		
	Production Manager: Andrea Sims		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Deborah Zivan		
	Production Manager 2: Jennifer C Arrieta		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.		
SRO Project Period	01/2021 - 12/2023		
Data Col Period	03/2022 - 08/2023		
Security Plan	NA		
Milestones	<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)		
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Report Period	July, 2023 (HRS 2022 Panel & Baselines)		Implementing
Risk Level	Attention!		
Monthly Updates	1. The project team has been working on production monitoring, cost monitoring, sample management, logging, weekly mailings (SSA and SAQ), payment and letter request processing. 2. Last day for Panel interviewing is Saturday, 9/2/23. Baseline interviewing will continue through at least June 2024.		



3. Panel Field Strategies:
- Panel End Game: 8% (n=161) of the Control group and 20% (n=190) of the Treatment group with 12+ TEL/FTF attempts have completed interviews.
  - Limited effort protocol: 1,428 Panel SIDs pulled from field.
  - Panel eFTF Mode Change: Of the 1,820 eFTF cases approved for mode switch to TEL, 400 (22%) have completed the interview and 16 (1%) have scheduled a firm appointment.
  - High Priority Sample: Of the 3,006 flagged as High Priority, 1,152 (38%) have completed interviews and 16 (1%) firm appointments have been scheduled.
  - Travel sample (in uncovered areas) was approved for telephone mode.
  - Direction to field staff to make 2-3 attempts per week to priority and 1 attempt to non-priority cases. Beginning 6/13/23, interviewers were given a list of cases to call based on priority flag and "best" status and a summary of effort made in the previous week. Production Managers monitored compliance by reviewing a special sample line level report generated weekly.
  - An interviewer incentive was implemented on 7/9/2023 and continued through the end of data collection (8 weeks). Interviewers are paid \$50 for each completed panel interview.
4. Will need to assess best strategies for baselines once Panel data collection wraps up.

\*As of 8/23/23, the "measures" table reflects both Panel and Baseline combined.

Special Issues	<div>- Will not meet the Panel response rate goal of 74% even with the additional five months of field time due to current interviewer count and balancing effort with new cohort screening/baseline iws. Project team continues to work with the client on responsive design options and realistic panel response rate expectation of 68%, as well working with the field staff on sample management strategies.</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> <div>- Staff attrition rate (60% to date) and approximately 10% of field staff are on performance improvement plans most of whom are from the April 2023 training (almost 50% of the April trainees).</div>			
Cost as of Aug 22, 2023	Total Cost to Date (direct + indirect):			16,905,732.63
	Est Cost at Completion (E\$AC):			18,151,955.82
	Total Budget:			19,016,630.00
	Variance (Total Budget minus- E\$AC):			864,674.18
	Reason for Variance:		Note: This budget is for the Panel sample but the monthly updates and milestones include baseline iws. The New Cohort Budget is under the HRS 2022 Screening MPR. The change in variance since last report is primarily due to unused travel in July and lowering travel projections in August for Panel. 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. Accounts for the interviewer base rate increase in 2023.	
Projections as of Aug 22, 2023	Dollars Projected for Month:			809,041.56
	Actual Dollars Used:			640,941.21
	Variance (Projected minus Actual):			168,100.35
	Reason for Variance:		The primary reason for variance was the unused travel in July and lowering travel projections in August.	
Measures		Units at Complete	RR	HPI
	Current Goal:	15,973	55%	10.7
	Goal at Completion:	23,468	46%	7.9
	Current Actual:	15,921	55.4%	10.6
	Estimate at Complete:	22,192	44%	9.7
	Variance:	1,276	2%	1.9
Other Measures	Panel: Expected RR: 68% (original goal 74%), Current RR: 66.4% (Panel end date 9/2/23) 2022 Baselines generated from screener: Goal RR: 26%, Current RR: 19.6% 2019 EGenX baselines: Goal RR: 70%, Current RR: 71.1%			

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	04/2024 - 05/2025		
Security Plan	NA		
Milestones	<div>Pre Production Start: 05/15/2023</div> <div>Pretest End: 02/11/2024</div> <div>Staffing Complete:</div> <div>SS Train Start: 04/07/2024</div> <div>DC Start: 04/15/2024</div> <div>Pretest Start: 01/30/2024</div> <div>Recruitment Start:</div> <div>GIT Start: 04/05/2024</div> <div>SS Train End: 04/12/2024</div> <div>DC End: 05/31/2025</div>		
Other Project Team Members	Alex Warju (Production 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), Dominic Bonanni (Project Assistant)		
	Tech Team: Karl Dinkelmann, Jeff Smith, Jim Rodgers, Laura Yoder, Marsha Skoman, Ashwin Dey, Pam Swanson, David Bolt, Deb Wilson, Jennie Williams, Rose Zybdel, Stephanie Windisch, Holly Ackerman, Shane Empie, Kelly Chatain, Brianna Sabol		
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		
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Report Period	July, 2023 (HRS 2024)		Planning
Risk Level	Some Concerns		
Monthly Updates	HRS 2024 preproduction activities continued with focus cost projections, technical specifications, and technical development.		
	*Milestone dates are tentative.		

<b>Special Issues</b>		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. Next build release scheduled for December 2023 (test version mid-November 2023), allowing a very short time to test before need to sign off on systems for HRS pretest in early January.		
<b>Cost as of Aug 22, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>	42,134.00		
	<b>Est Cost at Completion (E\$AC):</b>	820,778.84		
	<b>Total Budget:</b>	821,421.00		
	<b>Variance (Total Budget minus- E\$AC):</b>	642.16		
	<b>Reason for Variance:</b>	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.		
<b>Projections as of Aug 22, 2023</b>	<b>Dollars Projected for Month:</b>	37,443.74		
	<b>Actual Dollars Used:</b>	23,051.49		
	<b>Variance (Projected minus Actual):</b>	14,392.25		
	<b>Reason for Variance:</b>	Variance due to fewer staff hours than originally projected primarily due to staff ooto time and HRS 2022 needs. Future projections have been adjusted.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>		70%	
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
<b>Other Measures</b>				

Project Name	(HRS HOC) Health and Retirement Study – Historical Occupation Coding		
Project Mode	Primary: Data Processing		
Project Type	Sponsored Projects		
Budget	Direct Budget: 67,762.90	Indirect Budget: 24,394.16	Total Budget: 92,157.06
Principal	David Weir (SRC)		
Investigator/Clients	Amanda Sonnega (SRC)		
Funding Agency	NIA		
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Gloria J Baker		
	Budget Analyst: Cindy Tsao		
	Production Manager: Carolyn Vieira-Martinez		
	Senior Project Advisor: Jennifer C Arrieta		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	HRS Staff will provide SRO with the text description of approximately 10,000 occupations reported in interviews completed during 1994-2002 waves of data collection. The Survey Services Laboratory (SSL) will complete a crosswalk between the 1980 and 2010 occupation census codes as well ass occupation re-coding for jobs reported during the 1994-2002 waves of HRS data collection, using 2010 Census codes. Coding for these occupations was completed in the past using 1980 Census codes.		
SRO Project Period	09/2022 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start:   Pretest End:   Staffing Complete:   SS Train Start:   DC Start: </div> <div> Pretest Start:   Recruitment Start:   GIT Start:   SS Train End:   DC End: </div> </div>		
Other Project Team Members			
Other Project Name	HRS Historical Coding		
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	Desktop		
DE Software	Other (Coding Application)		
QC Recording Tool	NA		
Incentive	Not used		
Administration	N/A		
Payment Type	N/A		
Payment Method	N/A		
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Report Period	July, 2023 (HRS HOC)	Planning	
Risk Level	On Track		
Monthly Updates	During the month of July, - Jeannie participated in and scheduled meetings with the PI and budget analyst - Due to summer vacations and other project priorities, very little was accomplished in July and several meetings were canceled. - HRS Staff are still working on the variable tables and a SAS program that puts Ind/Occ files together for further use. 1994 files used in March seem to have disappeared so HRS Staff is working with CMT to recover. -Estimating that coding will be pushed back to October.		
Special Issues	- Delay of original coding work scope to now begin in October 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 Aug 22, 2023	Total Cost to Date (direct + indirect):	20,344.72	
	Est Cost at Completion (E\$AC):	85,335.02	
	Total Budget:	92,157.06	

<b>Variance (Total Budget minus- E\$AC):</b>		6,822.04		
<b>Reason for Variance:</b>	Variance is due to 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.			
<b>Projections as of Aug 22, 2023</b>	<b>Dollars Projected for Month:</b>	2,841.14		
	<b>Actual Dollars Used:</b>	510.46		
	<b>Variance (Projected minus Actual):</b>	2,330.68		
	<b>Reason for Variance:</b>	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 October 2023 so unused hours for project management, system set up, and coding will be pushed forward.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
<b>Other Measures</b>				

Project Name	(HRS2022-Screening) HRS 2022 - Screening		
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 21,264,149.00	Indirect Budget: 7,655,093.00	Total Budget: 28,919,242.00
Principal Investigator/Clients	David Weir (SRC) Helen Levy (SRC) Ken Langa (SRC)		
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Evanthia Leissou		
	Budget Analyst: Richard Warren Krause		
	Production Manager:		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Andrew L Hupp		
	Production Manager 2: Theresa Camelo		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample.		
SRO Project Period	02/2021 - 01/2024		
Data Col Period	03/2022 - 01/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start:   Pretest End:   Staffing Complete:   SS Train Start:   DC Start: 04/19/2022 </div> <div> Pretest Start:   Recruitment Start:   GIT Start:   SS Train End:   DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	SurveyTrak; MSMS; Other ((Blaise) Case Management App (CMA))		
Data Col Tool	Blaise 5		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Blaise 5 web instrument); N/A		
QC Recording Tool	Camtasia; N/A		
Incentive	Yes, R; Yes, INF		
Administration	SRO Group		
Payment Type	Check, post; Cash, prepaid (\$2); Cash, post		
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office		
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Report Period	July, 2023 (HRS2022-Screening)		Implementing
Risk Level	On Track		
Monthly Updates	<p>Batch 5 sample have been through the web portion of the protocol. Some areas were moved to the field early to keep interviewers with enough screening work. Given the focus on finishing the panel we are holding the release to the field of the Batch 5 cases that just finished the web protocol. We will send out on an as needed basis prior to the end of panel data collection.</p> <p>Only 1.7% of endgame cases completed a web screener. Sampling gave the go ahead to finalized1,010 limited access/safety/work permit endgame cases from the first four batches. Implementation of the endgame strategy for cases based on effort is on hold for the moment. The PIs want to change the amount of effort to be eligible for the endgame on the pre-ID cases. The want twelve in-person attempts for pre-id cases. The fresh sample will remain at six in-person attempts.</p> <p>The focus of the majority of time for most staff is on completing the panel. Panel work will be wrapping up on Sept. 2. Screening has slowed considerably until panel ends. We have begun returning cases to the field for additional effort to either be completed or reach the eligibility for the endgame strategy. We are working with the sampling</p>		

team to take stock of the screening cases that are out there to decide how to move forward once panel has ended. There is a discussion scheduled with the PIs and the sampling team to understand and plan what needs to be done when. This will impact how we move forward once panel has ended.

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

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

We have had discussions with the PIs about how many baseline interviewers we need to have done by the end of calendar year 2023. The goal is to have 50% (or more) of the EGENX goal (4,500-5,200), and all of the MOC goal (2,000). We are revisiting with the PIs these goals and timelines as it will effect our focus after panel concludes data collection.

#### Special Issues

<b>Cost as of Aug 08, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>	13,771,490.60
	<b>Est Cost at Completion (E\$AC):</b>	27,377,926.27
	<b>Total Budget:</b>	28,919,242.00
	<b>Variance (Total Budget minus- E\$AC):</b>	1,541,315.73
	<b>Reason for Variance:</b>	Projections are in the process of being updated.
<b>Projections as of Aug 08, 2023</b>	<b>Dollars Projected for Month:</b>	442,057.34
	<b>Actual Dollars Used:</b>	399,703.16
	<b>Variance (Projected minus Actual):</b>	42,354.18
	<b>Reason for Variance:</b>	The largest contributors to the variance were due to spending less in unused respondent payments. These costs were pushed forward.

Measures		Units at Complete	RR	HPI
	<b>Current Goal:</b>	3,600/1,500 HHs	73%	3.0
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>	2,233/2,265	39.6%	4.14
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			

#### Other Measures

Project Name	(LHMS 2023 Spring) Life History Mail Study Spring 2023		
Project Mode	Primary: Mail	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 293,540.00	Indirect Budget: 164,382.00	Total Budget: 457,922.00
Principal	David Weir (SRC)		
Investigator/Clients	Jaqui Smith (SRC)		
Funding Agency	NIH		
IRB	HUM#: HUM00229404	Period of Approval: 11/4/2022-11/3/2023	
Project Team	Project Lead: Gary Hein		
	Budget Analyst: Cindy Tsao		
	Production Manager: William Keating		
	Senior Project Advisor: Evanthia Leissou		
	Production Manager 1:		
	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 remaining 1,793 respondents will receive reminders by phone to complete the questionnaire. When a respondent is reached by phone, SRO will attempt to complete the 60-minute interview by telephone. Thank you postcards will be mailed to respondents who return a completed questionnaire.</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</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start: 07/11/2023</div><div>DC Start: 06/20/2023</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End: 07/11/2023</div><div>DC End: 09/23/2023</div></div>		
Other Project Team Members	Gary Hein: Project Lead 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	July, 2023 (LHMS 2023 Spring)		Implementing
Risk Level	Some Concerns		
Monthly Updates	1 -Logging of returned SAQs began 2- Error found in SAQ: four questions that should span two pages have been printed with those pages back to back. Asked dataforce to reprint. 3- In Person Training at Perry/Zoom, PI attending, 6STs and 3 TLs were trained. 4- Follow-up calling started 7/19 5- Reminder postcards mailed to no_phone_followup group 7/26 6- First shipment of completed SAQs to DataForce 7/28 7- First batch of replacement SAQs received 7/31; printed correctly		



<b>Special Issues</b>		-Slow start to reminder calling due to staffing shortage. Added three weeks of reminder calling (August) to help hit our target of six attempts per line. -The sample consists of respondents who were non-responders to LHMS in prior waves. The budgeted response rate goal of 54.3% is higher than previous waves of LHMS. -LHMS Spring respondents are also being contacted for HRS 2022 Panel interviews or have completed the 2022 Panel interview and agreed to complete a leave-behind questionnaire. Some respondents have expressed confusion during the LHMS spring reminder calling on the purpose of the call. The SSL staff and HRS 2022 interviewers have been provided instructions on how to handle this when respondents question the different contacts.		
<b>Cost as of Aug 22, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>	167,699.64		
	<b>Est Cost at Completion (E\$AC):</b>	314,508.68		
	<b>Total Budget:</b>	457,922.00		
	<b>Variance (Total Budget minus- E\$AC):</b>	143,413.32		
	<b>Reason for Variance:</b>	Actual sample of 1950 is lower than budgeted sample of 2288, resulting in generally lower costs across all resources.		
<b>Projections as of Aug 22, 2023</b>	<b>Dollars Projected for Month:</b>	74,568.68		
	<b>Actual Dollars Used:</b>	63,909.99		
	<b>Variance (Projected minus Actual):</b>	10,658.69		
	<b>Reason for Variance:</b>	Requested number of survey techs were not staffed, survey tech hours over projected. SSA/SSI hours over projected. Future projections adjusted due to extending reminder calling for three weeks in order to ensure all lines are attempted.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>	1053	54%	N/A
	<b>Goal at Completion:</b>	1053	54%	N/A
	<b>Current Actual:</b>	245	12%	17.7
	<b>Estimate at Complete:</b>	975	50%	17.7
	<b>Variance:</b>	78	4%	
<b>Other Measures</b>				

Project Name	(MI CReSS (Year 3)) Michigan COVID-19 Recovery Surveillance Cohort Study		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 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	<b>Project Lead:</b> Timothy Prand <b>Budget Analyst:</b> William Lokers <b>Production Manager:</b> Ruth B Philippou <b>Senior Project Advisor:</b> Nicole G Kirgis <b>Production Manager 1:</b> Lisa J Carn <b>Production Manager 2:</b>		
Proposal #	no data		
Description	<p>MI CReSS is a partnership between the University of Michigan School of Public Health (SPH) and the Michigan Department of Health and Human Services. It is a public health surveillance study to learn about Michiganders' experiences with COVID-19 using a representative sample of confirmed cases within the state. Using survey data, they plan to document sociodemographic inequities in COVID-19 testing, treatment, and recovery.</p> <p>SRO's involvement includes the administration of a Follow-up survey for respondents that completed a Baseline survey with the SPH team. Based on the sample information provided, we will be re-contacting approximately 3,995 respondents who have already completed (or are estimated) to complete the Baseline survey to administer the Follow-up survey.</p> <p>The Follow-up survey is estimated to be 45 minutes in length, and Respondents will be encouraged to complete the survey by web. However, SRO Interviewers will contact non-responders and conduct the interview over the telephone if the Respondents do not want to complete the survey on the web.</p>		
SRO Project Period	08/2021 - 09/2023		
Data Col Period	01/2022 - 07/2023		
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b> 11/29/2021   <b>DC Start:</b> 01/26/2022 </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b> 09/16/2021   <b>GIT Start:</b>   <b>SS Train End:</b> 12/02/2021   <b>DC End:</b> 07/07/2023 </div> </div>		
Other Project Team Members	Bill Lokers: Financial Analyst Megan Hromco: Production Assistant Hueichun Peng: Technical Lead / WSMS db Programmer Peter Sparks: CAI Programmer (Blaise 5) Cheng Zhou: Web Component, ADT, Reports LihShwu Ke: DBA Architecture & Data Security Sarah Broumand: Data Manager Deb Wilson: Help Desk		
Other Project Name			
Sample Mgmt System	Web SMS		
Data Col Tool	Blaise 5		
Hardware	Laptop; Desktop		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Check, post (\$25 )		
Payment Method	NA		
Report Period	July, 2023 (MI CReSS (Year 3))		Implementing
Risk Level	On Track		
Monthly Updates	Release 13 - closed in field Aug 14th Release 14 - in field until Sept 11th		

Release 15 - CATI closed Aug 17th and in field until Oct 16th  
Release 16 - In CATI until Sept 14th and in field until Nov 13th

Release 16 reached 80% early due to changes in the sample rules within WSMS.

Continued to focus on Cohort 2 launch.

#### Special Issues

In July, Nancy (PI) raised a concern around the complete ratio for Spanish interviews for Follow-On 1  
- English – 79%, Arabic – 87%, Spanish – 48%  
- Initial investigations are inconclusive when looking overall  
- Overall call attempts actually show a higher number of attempts for Spanish  
- English-8.1 , Arabic-7.4 , Spanish-12.8  
- Will monitor closely for FO2  
Follow-On 2 has delayed its start in field from July 6 to Aug 29 due to IRB approvals and programming updates needed

Cost as of Jul 20, 2023	<b>Total Cost to Date (direct + indirect):</b>	492,623.51
	<b>Est Cost at Completion (E\$AC):</b>	657,057.84
	<b>Total Budget:</b>	841,375.00
	<b>Variance (Total Budget minus- E\$AC):</b>	184,317.00
	<b>Reason for Variance:</b>	New funding was added. Working with Bill and Nicole to see if we can extend the budget past 9/30. Expect to be significantly under.

Projections as of Jul 20, 2023	<b>Dollars Projected for Month:</b>	72,424.06
	<b>Actual Dollars Used:</b>	63,111.33
	<b>Variance (Projected minus Actual):</b>	9,312.73
	<b>Reason for Variance:</b>	On the final 2 sample releases and are starting to run out of sample lines which means there will be a larger variance in interviewing. FO2 has not started on time which will also impact interviewing time.

Measures		Units at Complete	RR	HPI
	<b>Current Goal:</b>	5,142 (Rel 1-16)	80% (60%-Web/40%Tel)	2.25
	<b>Goal at Completion:</b>		80% (60%-Web/40%Tel)	
	<b>Current Actual:</b>	4066	80% (71%-Web/29% Tel)	4.93
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			

#### Other Measures

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

- 'usual' pre-production tasks have begun - including, creating the schedule and reviewing de-brief feedback from interviewers.
- work continues to transition MTF (base year and panel) to Qualtrics. The MTF research team have programmed the base year survey in Qualtrics. Hueichun and Shaowei are working on familiarizing themselves with Qualtrics, required updates the portal and

## Special Issues

<b>Cost as of Aug 08, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>	1,641,148.45
	<b>Est Cost at Completion (E\$AC):</b>	6,902,093.89
	<b>Total Budget:</b>	9,778,060.00
	<b>Variance (Total Budget minus- E\$AC):</b>	2,875,966.11

### Reason for Variance:

Current projections result in a large underspend for the five year grant period.  
The first two years were budgeted originally at \$3,802,561.  
MTF have reduced our funding for the first two years. We have received (from MTF) \$1,843,080 (Y1) and \$1,143,890 (Y2) for a total of \$2,986,980. A reduction of \$815,581.  
The current plan is to fund Year 3 as normal (i.e. based on the budgeted amount) but then do the same thing in Year 4 - if there is significant underspending MTF are planning to reduce SRO's Year 5 award.  
SRO Finance feels that we should continue to report/monitor using the original amount, because this is not an official reduction in budget.  
'Ryan says we are keeping Nick informed on our expenses and it is his job to decide how much and when to distribute funds. He does not see this as an official SRO budget cut on MTF BY. We keep projecting according to our expected needs on the project.'

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A client report (with notes) is provided to Nicholas Prieur every month so the MTF research staff are aware of projected cost to complete. In April I provided Nick with more details about interviewer costs and assumptions used for projections. The amount provided to SRO will probably decrease for future years to reflect the current scope of work (i.e. surveys completed in less schools and using the post pandemic protocols). I have adjusted the projections for 2024 onwards based on completing survey administrations in 325 schools (number was agreed with Nick) - rather than 400. This increases the underspend.

\*\*\*\*\*

Not changed since last month (January) - left for info.  
Projections for the five year period are based on current scope of work and the adapted protocol (introduced in 2021). The budget prepared for the proposal was based on the pre-pandemic design. The adapted protocol brings savings in the following categories: interviewer hours, travel, shipping and staff time (specifically hours required for loading and preparing tablets for shipping). For the past few years the number of schools recruited and passed to SRO has been lower than the number on which the budget is based (n=390), we have continued to base projections on achieving survey administrations in 390 schools. Wave 1 (2023)  
- We have increased staff time (marginally) to prepare for the small pilot (six schools) to test methods to increase cooperation from 12th grade students to provide contact details.  
We may also add some hours and expenses for FTF school recruitment trips that SRO has been asked to help with (given the lower response than is usual at this point, it is hoped that FTF visits may boost recruitment).

<b>Projections as of Aug 08, 2023</b>	<b>Dollars Projected for Month:</b>	48,593.00
	<b>Actual Dollars Used:</b>	29,764.89
	<b>Variance (Projected minus Actual):</b>	18,828.11

### Reason for Variance:

The main source of the variance are non salary costs - including freight costs were \$2,000 lower than projected.

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

## Other Measures

Project Name	(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 2,496,935.00	Indirect Budget: 1,398,282.00	Total Budget: 3,895,217.00
Principal	John Schulenberg (UM-SRC)		
Investigator/Clients	Megan Patrick (UM-SRC)		
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Donnalee Ann Grey-Farquharson		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lloyd Fate Hemingway		
	Senior Project Advisor: Rebecca Gatward		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	This project is a continuation of MTF Illume Web 2021.  PI staff will edit and test 12 survey versions, all previously programmed in Illume by SRO. SRO will further test the surveys as part of the systems integration process. All 12 surveys will be launched in 2021. After testing is complete, SRO will launch the 2021 Web survey data collection with an estimated sample size of 20,000 cases identified by the Principal Investigator who will deliver the contact information including e-mail address to SRO. The Web survey data collection will replace aspects of the standard mail-based data collection. Both the separately funded Winter Location calling effort and Non-Response follow-up calling will include this sample – with the calling effort being integrated with the standard MTF activities.		
SRO Project Period	01/2022 - 03/2027		
Data Col Period	04/2022 - 10/2026		
Security Plan	NA		
Milestones	Pre Production Start: Pretest Start: Pretest End: Recruitment Start: Staffing Complete: GIT Start: SS Train Start: SS Train End: DC Start: DC End:		
Other Project Team Members	Rebecca Gatward (SPA), Donnalee Grey-Farquharson, Lloyd Hemingway, Hueichun Peng, Shaowei Sun, Peter Sparks, Ashwin Dey, Hongyu Johnson, Minako Edgar, Brad Goodwin		
Other Project Name	MTF		
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
Report Period	July, 2023 (MTF Panel 2022-27)		Implementing
Risk Level	On Track		
Monthly Updates	1. Management - continued discussing with the study team on implementing Qualtrics survey in 2024 production. -Continued to work with the study team staff on data delivery plan.  2. System - Continues to monitor the production on Web SMS, RLM, LabSMS systems  3. Data Collection - As of 07/31/2023 -Total Released Sample = 18727 -Total Completes = 8635 - RR = 46.11%  4. Data Delivery: SRO team continued to work with the study team on data delivery process.		

5. NR - continued data collection until Aug, 16, 2023.

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

#### Special Issues

Cost as of Jul 31, 2023	<b>Total Cost to Date (direct + indirect):</b>	1,046,749.07
	<b>Est Cost at Completion (E\$AC):</b>	3,843,024.33
	<b>Total Budget:</b>	3,895,217.00
	<b>Variance (Total Budget minus- E\$AC):</b>	52,192.67

<b>Reason for Variance:</b>	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.
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Projections as of Jul 31, 2023	<b>Dollars Projected for Month:</b>	67,807.83
	<b>Actual Dollars Used:</b>	55,443.76
	<b>Variance (Projected minus Actual):</b>	12,364.07

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

#### Other Measures

Project Name	(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	<div><div>Pre Production Start: 10/01/2021</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	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	July, 2023 (PR-PSID)		Implementing
Risk Level	Some Concerns		
Monthly Updates	<p>SRO scheduled a few meetings with ETI to review their costs, but ETI was not prepared. During the third meeting, ETI provided first cost report to PIs. PIs communicated concerns that ETI was not prepared at meetings with ETI leadership.</p> <p>U-M/ETI discussed moving production timeline to early 2025 -- ETI was completely flexible. PIs discussing implications of delaying production period with NICHD. PIs requested the SRO and ETI finalize budget revisions for NIA by early November. SRO updated projections to reflect delaying production until April 2025. Pretest is still tentatively planned for October.</p> <p>ETIs created a questionnaire for sample recruitment in QuestionPro - SRO was not expecting them to program the web questionnaire - expected them to draft questions first. SRO learned from CMT that use of QuestionPro would require OGC signoff, and decided not to pursue further. Questionnaire will either be programmed in Qualtrics, or IWERs will document recruitment information in Excel without a standard questionnaire.</p>		



PI met with Raphael to discuss listing documentation. All listing edits are done. Final 5 listing laptops were shipped back to SRO on 7/31.

Received second invoice from Atabex -- ~\$6k balance remains on contract. \$2,500 allocated for Brown temp's work. Exploring option to hire her through U-M. Atabex provided translations for all materials delivered and SRO informed them that we would not extend the contract. Brown temp will initially focus on translating materials needed for Pretest. Will explore options to minimize translation work scope as much as possible.

Confirmed CS routing with PSID. Updated Core preload structure for PR-PSID. Programming of PR-PSID translations began and CTT project was created. SRO continued to work on ghost image for ETI laptops. SRO

<b>Special Issues</b>	Timeline concerns: unsure how long translations will take and whether pretesting in October is feasible. Cost of translation has ben significantly higher than budgeted.			
<b>Cost as of Aug 22, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>	359,239.57		
	<b>Est Cost at Completion (E\$AC):</b>	1,263,235.85		
	<b>Total Budget:</b>	1,292,585.00		
	<b>Variance (Total Budget minus- E\$AC):</b>	29,349.15		
	<b>Reason for Variance:</b>	Projected cost to complete increased by \$20k. Main driver is increase in app programmer analyst intermediate, SSI, and Financial Analyst hours for pre-production for Main Data Collection.		
<b>Projections as of Aug 22, 2023</b>	<b>Dollars Projected for Month:</b>	33,008.61		
	<b>Actual Dollars Used:</b>	24,272.98		
	<b>Variance (Projected minus Actual):</b>	8,735.63		
	<b>Reason for Variance:</b>	Actuals in tech categories were lower than projections.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
<b>Other Measures</b>				

Project Name	(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	<p>A 2023 wave of the Childhood Development Supplement (CDS) is going to be conducted in two phases. Phase 1: from September 2023 – May 2024 and Phase 2: from June 2024 - January 2025. The sample for CDS is comprised of the PSID-eligible children (ages 0 -17) from the Core 2023 families we interview and their primary caregivers. Approximately 3,700 families will be included, with some Core families containing several CDS children. As part of the CDS Phase 1, families are asked to complete phone coverscreen and PCG interviews followed by mixed Adolescent 12 - 17 phone/web interview (including an IVR component in phone mode). In Phase 2 families will be visited in person (where possible) and asked to complete Child 8 - 11 interviews (via Video if out of area), provide physical measurements, educational assessments, saliva collection, time diaries, school and birth record linkage forms. CDS interviewing will be conducted by a mix of SSL and Field interviewers. Coverscreen and PCG interviews will be handled by SurveyTrak and Blaise 4.8, Adolescent interviews will be handled by MSMS and Blaise 5.</p>		
SRO Project Period	08/2022 - 01/2025		
Data Col Period	09/2023 - 01/2025		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 10/01/2022  Pretest End: 05/14/2023  Staffing Complete: 09/01/2023  SS Train Start: 01/18/2024  DC Start: 01/22/2024 </div> <div> Pretest Start: 04/24/2023  Recruitment Start: 07/01/2023  GIT Start: 12/12/1999  SS Train End: 01/22/2024  DC End: 07/31/2024 </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)		
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Report Period	July, 2023 (PSID CDS 2023)		Initiation
Risk Level	On Track		
Monthly Updates	<p>CDS 2023 has not yet received the 2023 - 2025 funding from NIHCD and expects 45% cuts. SRO is slanted to receive more funds than required to administer Phase 1 of the CDS 2023 study (remote, phone-web interviews with PCGs and their children). However, CDS 2023, at this point, will exclude Phase 2 unless additional funding becomes available -- Phase 2 included at home visits and administration of Woodcock-Johnson, Saliva, and PM measurements.</p> <p>CDS 2023 Pretest started in July 2023 and continues at a slow pace dictated by availability of interviewers and families (summer schedules). We completed 36 of 38 released Coverscreens and interviewer 26 Adolescents (19 web / 7 phone + IVR) and 17 younger children (8 - 11) 9 of which completed via Zoom.</p> <p>We also conducted an early debrief with interviewers and the PIs. Interviewers endorsed Web for adolescents - saying PCGs had a positive reaction when they learned their adolescents could complete via Web. Zoom with</p>		

younger kids received mixed feedback - some interviewers did not see the value of being on Zoom but some felt they could keep younger children more engaged. IVR solution has worked well - adolescents completed 7 of 7 requested IVRs on the spot (albeit the "demo" survey is shorter than the production version).

Pretest interviewers were also OK with using two sample management system but iwers had some issues with adhering to the protocol which, fortunately, can be addressed through further programming, and there is an unfortunate lag between PcG consents and adolescent lines being created in MSMS. The MSMS team is tasked with creating an API to reduce this lag and auto-load adolescents lines but the process will not be instantenous.

Although the IVR solution seems to work well, we are still finalizing the last part of the IVR contract - SRC needs to agree to Enghouse data protection agreement.

Development for Phase 1 will start in mid-September. Phase 1 training is scheduled for January 18, and production to start on January 22.

CDS completed a round of OS posting / hiring and we are cautiously hopeful that we will be able to staff CDS 2023 with OS only and consider conducting a remote training.

<b>Special Issues</b>		<p>Budget: Contingency budget has been established through October '22 but as of July we still don't have a clear expectation for when the funding will be awarded. SRO is communicating regularly with the PI and the SRC Director's office to monitor the contingency account</p> <p>Tech systems: CDS development is ceding programming time to allow some programmers to focus on PSID-Core launch. This led to some delays on the MSMS side of our development.</p>		
<b>Cost as of</b>	<b>Total Cost to Date (direct + indirect):</b>			0.00
	<b>Est Cost at Completion (E\$AC):</b>			0.00
	<b>Total Budget:</b>			0.20
	<b>Variance (Total Budget minus- E\$AC):</b>			0.00
	<b>Reason for Variance:</b>	CDS is under contingency funding awaiting funding decision from NIH. We spent \$309K direct through July (after applying \$178K funds provided by the PI to the cost incurred Sep 2022 - Feb 2023).		
<b>Projections as of</b>	<b>Dollars Projected for Month:</b>			0.00
	<b>Actual Dollars Used:</b>			0.00
	<b>Variance (Projected minus Actual):</b>			0.00
	<b>Reason for Variance:</b>	In July, we projected spending \$52K but spent \$41K.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>	tbd	tbd	tbd
	<b>Goal at Completion:</b>	tbd	tbd	tbd
	<b>Current Actual:</b>	tbd	tbd	tbd
	<b>Estimate at Complete:</b>	tbd	tbd	tbd
	<b>Variance:</b>	tbd	tbd	tbd
<b>Other Measures</b>				

Project Name	(PSID TAS 2023) Transition to Adulthood within its Life Course & Intergenerational Family Context		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 934,249.00	Indirect Budget: 523,179.00	Total Budget: 1,457,428.00
Principal Investigator/Clients	Narayan Sastry (U-M PSC SRC)		
Funding Agency			
IRB	HUM#: 00112629	Period of Approval:	
Project Team	<b>Project Lead:</b> Elizabeth Ohryn <b>Budget Analyst:</b> Ivanna Iavorska-Em <b>Production Manager:</b> Carolyn Vieira-Martinez <b>Senior Project Advisor:</b> Stephanie A Chardoul <b>Production Manager 1:</b> Daric Thorne <b>Production Manager 2:</b>		
Proposal #	no data		
Description	<p>TAS 2023 is the 10th Wave of TAS study, part of the PSID Suite of projects.</p> <p>Approximately 3,000 youth aged 18 - 28 years who are part of families who participate in the ongoing Panel Study of Income Dynamics (PSID) are invited to take part in a 60-minute web survey. In 2023, all respondents go through the same sequential treatment - non-responders to web survey are called as part of the non-response follow up. Respondents will be offered a up to \$145 for completing the interview which includes a \$75 base payment and possible other interventions. Phone interviews will be completed by Survey Research Center Survey Services Lab (SSL) interviewers.</p>		
SRO Project Period	05/2023 - 07/2024		
Data Col Period	10/2023 - 05/2024		
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b> 05/01/2023   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b> 10/02/2023   <b>DC Start:</b> 10/03/2023 </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b> 07/23/2023   <b>GIT Start:</b> 10/03/2023   <b>SS Train End:</b> 10/06/2023   <b>DC End:</b> 05/31/2023 </div> </div>		
Other Project Team Members	PSID Suite SRO Lead - Shonda Kruger-Ndiaye; TSG Tech Leads - Jim Rodgers, Laura Yoder, and Jeff Smith; Data Manager - Rose Zybel; Blaise Programmer - Youhong Liu; Portal - Jude Perillo MSMS Programmers - Pam Swanson and Darnell Christian; Help Desk Support - Deb Wilson; Testing Coordinator - Camila Kendall; Project/Production Support - Jaime Koopman, Narine Verdiyan, & Xiomara Lorenzo-Guerra; Reporting - Piotr Dworak		
Other Project Name			
Sample Mgmt System	MSMS		
Data Col Tool	Blaise 5		
Hardware	Laptop; Desktop; [UM cell] Phone		
DE Software	NA		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	SRO Group		
Payment Type	Check, post (\$75); Other (ePay)		
Payment Method	Check through other system (PSID RAPS); Other (ePay)		
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Report Period	July, 2023 (PSID TAS 2023)		Planning
Risk Level	On Track		
Monthly Updates	<p>Summary of July 2023 Activities</p> <p>Staffing: Team leaders (n=4) and locators (n=2) posted and staffed.</p> <p>Management: Submitted IRB amendment with changes for 2023 wave on 7/10. Addressing requested changes including more protocol specificity and adherence to the (recommended) informed consent template.</p> <p>Technical: The Blaise 5 instrument continues to undergo simultaneous programming and CTT testing. MSMS specifications</p>		

were delivered for programming on 7/10/23 with the final DCA specs being delivered one week later. The aim is for Blaise and MSMS programming to be far enough along by 8/4/23 to allow for the creation of an INT project.

<b>Special Issues</b>		
<b>Cost as of Aug 16, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>	78,458.83
	<b>Est Cost at Completion (E\$AC):</b>	1,386,733.37
	<b>Total Budget:</b>	1,457,428.00
	<b>Variance (Total Budget minus- E\$AC):</b>	70,697.63
	<b>Reason for Variance:</b>	Data collection scope in the process of being finalized. Allocations will be updated based on PI requests and final project specifications.
<b>Projections as of Aug 16, 2023</b>	<b>Dollars Projected for Month:</b>	58,937.16
	<b>Actual Dollars Used:</b>	43,061.04
	<b>Variance (Projected minus Actual):</b>	15,876.12
	<b>Reason for Variance:</b>	Actuals in tech and project management categories were lower than projections.

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

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	<div><div>Pre Production Start: 03/01/2022</div><div>Pretest Start: 10/11/2022</div><div>Pretest End: 10/31/2022</div><div>Recruitment Start: 09/19/2022</div><div>Staffing Complete: 04/21/2023</div><div>GIT Start: 06/05/2023</div><div>SS Train Start: 03/08/2023</div><div>SS Train End: 06/11/2023</div><div>DC Start: 03/23/2023</div><div>DC End: 02/28/2024</div></div>		
Other Project Team Members	TSG Tech Leads - Jim Rodgers, Jeff Smith, & Karl Dinkelmann; Data Manager - Brad Goodwin; 68ID Site Programmer - Ashwin Dey; Blaise Programmer - Jude Perillo; MSMS Programmers - Pam Swanson; 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)		
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Report Period	July, 2023 (PSID23)		Implementing	
Risk Level	Some Concerns			
Monthly Updates	<p>Summary of July 2023 Activities</p> <p>Production: Launched self scheduler on 7/13—inviting releases across the remaining days in July by sending batch text and batch email messages. Released first batch of Splitoff sample on 7/18—releasing additional batches each week. Initiated Release 6 Web Special Offer on 7/24—last WSO intervention. Discussing possible future interventions with Pls.</p> <p>Tech: Blaise SQL server crash on 7/16--Blaise databases were unreachable. PSID data manager identified an issue when data delivery did not process. Blaise Admins contacted CMT. CMT brought server back online and monitored activity—also set up additional alerts. Cause and impact unknown. Blaise data model 2 preparations underway. New data model fixes English bugs that were not showstoppers for launch, adds Spanish CATI, and addresses RPay issues. PSID IDPM signed off in CTT on 7/24. Migrated DM2 into INT3 projection on 7/26 for integration testing. Expected production migration in early August. Fixing/improving DCA and 68ID Site.</p> <p>Spanish: On-going Spanish web testing and bug fixing. On-going Spanish text and email template testing.</p> <p>Saliva: Testing saliva line generation and displaying geographic maps in DCA. Signed off on rules and DCA layout. Respondent material and report development underway. Purchasing supplies.</p> <p>Training: Preparing for Spanish CATI (8/4 and 8/7), saliva assembly (8/8), and occupation/industry coding (8/17) training.</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. Interview aspects of the project taking more effort than anticipated, which has led to less effort being spent on the saliva portion of the project.			
Cost as of Jul 18, 2023	Total Cost to Date (direct + indirect):		2,497,758.43	
	Est Cost at Completion (E\$AC):		5,945,955.64	
	Total Budget:		6,235,802.00	
	Variance (Total Budget minus- E\$AC):		289,846.36	
	Reason for Variance:	July CRS is not yet final – modifications to iwer projections are needed. CRS has the main iw and saliva budgets loaded. Recruitment effort and non-salary costs less than budgeted. Iwer effort more efficient than budgeted due to respondents' willingness to complete the survey via web. Note: Unable to separate Core IDC costs from Contact Update IDC costs. Cost values only reflect Direct Costs.		
Projections as of Jul 18, 2023	Dollars Projected for Month:		656,783.35	
	Actual Dollars Used:		357,110.00	
	Variance (Projected minus Actual):		299,673.35	
	Reason for Variance:	July CRS is not yet final - modifications to iwer projections are needed. Help desk, support staff, and interviewers charged less time than projected. Hosting charges have not hit the project yet. Note: Unable to separate Core IDC costs from Contact Update IDC costs. Cost values only reflect Direct Costs.		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:	9646	89%	6.58
	Current Actual:	5411	55%	2.9
	Estimate at Complete:			
	Variance:			
Other Measures	<p>Notes for Measures Above: From Dashboard through 7/29/23. Units Completed = 5411 iws (776 CATI--14%, 4635 web--86%). Sample Invited = 9875. Still need to develop a goal chart.</p> <p>BUDGET ASSUMPTIONS: Mode of completion: 60% web &amp; 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		
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Report Period	July, 2023 (QoL & Hearing Loss)		Closing
Risk Level	On Track		
Monthly Updates	No SRO activity in July. The research team reviewed the final report delivered by SRO at the end of June and would like to talk about next steps for the work. A meeting is scheduled for August 18 to discuss where to go from this work. At the meeting we can revisit piloting the assessment and developing an additional work scope and budget if there is a continued role for SRO.		
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:		None
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
	<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	(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		
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Report Period	July, 2023 (SAME)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Project Management:		

- Regularly provide updates and concerns to the SRO Admin team.
- Continued to closely monitor the costs and adjust projections with the financial analyst.
- Successfully recruited respondents more than we projected.
- Received IRB approval on Snowball Recruitment Technique and sent 16 emails according (with one response)
- Assigned SSA started distributing tablets to the field

Technical System Development and Testing/Training:

- Continue to coordinate with the technical team staff to monitor tech issues during production.
- Initiated the conversation on WJ assessment data scoring plan with SRO Admin and TSG Admin.

Interviewer Hiring & Training

- successfully completed 3 training sessions with a total of 7 interviewers and 1 TL

Production:

- We recruited a total eligible kids - 139 (recruited 141 but 2 coded out) among 89 families
- Production Stats: as of 7/31/23 - 48 completes (first mode), RR 17%

Special Issues	- have been working on opportunities for cost savings - started to plan post data collection activities with the TSG and the PI			
Cost as of Jul 31, 2023	Total Cost to Date (direct + indirect):		168,053.18	
	Est Cost at Completion (E\$AC):		310,817.91	
	Total Budget:		302,327.00	
	Variance (Total Budget minus- E\$AC):		-8,490.91	
	Reason for Variance:	The overrun was caused by readjusting the estimated projections across the board to the end of September 2023. We are looking for possibilities to adjust projections in order to reduce overrun.		
Projections as of Jul 31, 2023	Dollars Projected for Month:		58,820.38	
	Actual Dollars Used:		34,679.99	
	Variance (Projected minus Actual):		24,140.39	
	Reason for Variance:	Strategized to reduce hours among Application programmers, HelpDesk staff and field staff in July overall.		
Measures		Units at Complete	RR	HPI
	Current Goal:	282	100	8.0
	Goal at Completion:	240	100	
	Current Actual:	48	17	11
	Estimate at Complete:	282		8.0
	Variance:	234		-3
Other Measures	The current production HPI includes the recruitment and conducting interviews efforts.			

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:</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start: 12/27/2022</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End: 12/20/2023</div></div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; Desktop; [UM cell] Phone		
DE Software	NA		
QC Recording Tool	DRI-CXM		
Incentive	Not used		
Administration	N/A		
Payment Type	N/A		
Payment Method	N/A		
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Report Period	July, 2023 (SCA 2023)		Initiation
Risk Level	On Track		
Monthly Updates	SCA July 23 began as scheduled on MON 6/26/23, and ended 1 day ahead of schedule on SUN 7/23/23. We completed 601 IWs (320 RDD/180 RECON/101 R12), 1 IW ahead of goal (600:320/180/100) at a cumulative HPI of 3.19 (.01 below the budgeted HPI of 3.2 though above the targeted HPI of 3.0.		
Special Issues	A new class of June trainees contributed to the higher than targeted HPI for the month.		
Cost as of Aug 17, 2023	Total Cost to Date (direct + indirect):		732,640.81
	Est Cost at Completion (E\$AC):		1,276,672.31
	Total Budget:		1,332,352.00
	Variance (Total Budget minus- E\$AC):		55,679.69
	Reason for Variance:		An overestimate of the STI and STII hours needed for the July study month as compared to actual was the major contributor to the increase in the expected underrun for CY 2023.

Actual Dollars Used:

95,650.27

Variance (Projected minus Actual):

12,508.76

Reason for Variance:

An overestimate of the STI and STII hours needed for the July study month as compared to actual was the major contributor to the increase in the expected underrun for CY 2023.

Measures		Units at Complete	RR	HPI
	Current Goal:	600		3.0
	Goal at Completion:	600		3.0
	Current Actual:	601		3.19
	Estimate at Complete:	601		+19
	Variance:	+1.00		

Other Measures

Project Name	(SRS 2021) Social Relations 2023		
Project Mode	Primary: Face to Face	Total of Modes: 1	
Project Type	Sponsored Projects		
Budget	Direct Budget: 3,767,057.11	Indirect Budget: 2,109,553.00	Total Budget: 5,876,610.11
Principal	Toni Antonucci (ISR)		
Investigator/Clients	Kristine Ajrouch (ISR)		
	Laura Zahodne (ISR)		
Funding Agency	NIH		
IRB	HUM#:		Period of Approval:
Project Team	Project Lead: Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Taghreid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 3400 interviews with respondents aged 35 years or older residing in the tri-county area of Southeast Michigan (Wayne, Oakland and Macomb counties) and 244 interviews with original Social Relations panel sample members aged younger than 65 years of age. The project involves screening up to 6900 new sample lines., with one selected respondent per household. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements (height, weight, blood pressure, grip strength) and saliva collection. The SRS 2023 project will use the same instrument programmed for the D-Amp project, with the only new programming being that for a screener. The screener will be translated into Arabic. No informant or proxy interview is included in the project scope. Interviews will be conducted in English or Arabic.		
SRO Project Period	09/2021 - 05/2023		
Data Col Period	05/2023 - 04/2024		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 09/01/2022</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: 04/30/2023</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	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)		
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Report Period	July, 2023 (SRS 2021)		Implementing
Risk Level	Attention!		
Monthly Updates	NOTE: The project is not projecting an overrun - we assume scope will be reduced to fit within available budget.  SRS interviewing & screening is very, very slow due to excessively high interviewer attrition and low productivity among the interviewers. Hours per screen are high compared to the budget. We will be discussing interventions with the research team including increasing the TOA, and bringing on experienced interviewers as travelers.  While we have some savings in some areas (training, recruitment) due to high attrition, we will need to add more interviewers in order to keep production going. Programming is well over budget due to the complexity of the instruments an unanticipated problems trying to bring the 2019 instruments back on-line.		

#### Task 1: Management, Budget and Work Plan

- Held meetings with the DAWN research team to discuss study planning, budget, scope and schedule for D-Amp and SRS.
- Financial
  - o Prepared cost reports and reviewed monthly expenses.
  - o Finalized projections and entered them into the cost reporting system
- Technical systems & Questionnaires
  - o Updated and finalized Arabic main questionnaire and respondent booklet, Arabic Informant questionnaire and respondent booklet.
  - o Conducted repeated rounds of testing on all instruments and on the sample management systems
  - o Continued updates to English Proxy questionnaire specification. Began updating Arabic proxy questionnaire specification.
  - o Finalize specification for logging program
- July Training preparation
  - o Finalized study-specific training agenda for team leader training, train-the-trainer, and interviewer training.
  - o Updated powerpoint presentations and pre-study training on Canvas.
  - o Finalized updates to project manual.
- Production
  - o Printed materials for Arabic training
  - o Revised concerns letters (English), created new concerns letters for issues arising during interviewing
  - o Triaged and completed one mandated report related to SRS production.

#### Task 2: Sampling

- Adjusted dashboards for production monitoring, worked on interviewer-level performance dashboards

#### Task 3: Questionnaire Development

- See Task 1 for activities completed by the management team
- Conducted repeated rounds of testing on all instruments

#### Task 4: CAI Programming

- Conducting iterative programming/testing on Arabic instruments.
- Began programming of proxy instrument
- Modified programming of screener

#### Task 5: Systems Programming

- Conducted continued rounds of testing/bug fixes to all sample management instruments
- Began programming formal logging program

#### Tasks 6, 7: Interviewer Recruitment & Hiring, Training

- Facilities
  - o Finalized contract for July training
  - o Conducted outreach to facility to update specifications for audio visual equipment for July training
- Processed personnel paperwork for interviewers who left from (resigned from) the May training cohort
- Interviewer recruitment for July
  - o Made offers to additional selected candidates, processed hiring paperwork and requested background checks.
  - ? 46 interviewers hired for July, including 4 certified bilinguals (2 additional not yet certified).
  - ? Processed paperwork for interviewers who did not show for training, or who left during training.
- Interviewer Training
  - o Conducted team leader training for 3 new team leaders July 11, 12, 13 (virtual) and July 17, 18 (in person)
  - o Conducted general interviewing techniques training July 17 and 18
  - o Conducted study specific training July 18-16
  - ? 27 fully certified interviewers (2 bilinguals), 3 certified for screening only
  - o Shipped cognition & saliva kits to newly certified interviewers

#### Task 8: Main Data Collection

- Responded to incoming email from respondents, logged returned mail
- Logged/checked returned cognition packages
- Fulfilled supply requests from field
- Conducted quality assurance on completed interviews; provided feedback to interviewers.
- Released 3205 new sample lines to the field; mailed prenotification letters with \$2 token
- Through July 31, 2023:
  - o Screener Completions:
    - High MENA Low MENA
  - Selected for D-Amp 37 0
  - Selected for SRS 16 177
  - Eligible, Not Selected 305 0
  - Not Eligible 22 38
  - Non-Sample 1 12

- o D-AMP – 2 completed main interviews, 1 completed informant interview
- o Social Relations – 77 completed interviews, 1 non-interview (language barrier)

#### Task 9: Post Collection Processing

- No activity this month

#### Task 10: Weighting

- No activity this month

#### Task 11: Final Data Deliverables

- Prepared specification for interim data deliverables
- Prepared interim data for SRO team review; reviewed data and made adjustments

## Special Issues

### Areas Needing Special Attention

- Production Interviewing – production screening and interviewing continues to proceed more slowly than anticipated due to a lower number of interviewers completing training and lower than anticipated hours being worked by interviewers. Hours per screener, hours per interview remain significantly higher than budgeted. Travel per completed case is higher than budgeted.
  - o The production management team is actively working with interviewers to ensure they work the required number of hours and work sample lines efficiently and effectively.
  - o Participation in saliva collection is higher than anticipated (currently about 85%). While it is still too early to make predictions about the entire study, this is an area to watch as it could result in higher costs due to the need to order more supplies, and on the research side, pay for more samples to be processed.
- Financial:
  - o Projections currently assume that the projects will work within the budget allocated. We are not projecting overruns, but rather assuming that scope will be reduced to fit within the budget.
  - o SRO is monitoring interviewing costs. As noted above hours per completed screener and hours per interview are running higher than budgeted.
  - 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 is still experiencing significant attrition both before and after training. This is slowing the pace of production. 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.
  - o The project hired 46 interviewers for the July training, however only 32 presented at training. Two additional interviewers left during training. 27 interviewers were certified for full interviewing, with 3 certifying for screening only.
  - o The project hired 28 interviewers for the May training. 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 to start production.
  - o As of 8/22, from the May training – 12 interviewers remained on staff (10 fully certified, 2 screeners, 3 bilinguals); from the July training – 27 interviewers on staff (24 fully certified, 3 screeners, 3 bilinguals)
- Schedule
  - o Programming is running behind schedule due to issues noted above.
  - ? Priority is being given to launching the screener (English & Arabic), and the main survey, physical measures and cognition sections in English, as well as the informant questionnaire in English.
  - ? The Arabic version of the main questionnaire, informant interview launched on August 15.
  - ? The proxy English questionnaire is being programmed (Aug 2023). The proxy Arabic questionnaire needs some translation.

<b>Cost as of Aug 22, 2023</b>	<b>Total Cost to Date (direct + indirect):</b>	857,483.10
	<b>Est Cost at Completion (E\$AC):</b>	5,873,069.19
	<b>Total Budget:</b>	5,876,610.11
	<b>Variance (Total Budget minus- E\$AC):</b>	3,540.92
	<b>Reason for Variance:</b>	The variance is insignificant. We are not projecting an overrun, rather we are assuming that the project will reduce scope to fit within the budget.
<b>Projections as of Aug 22, 2023</b>	<b>Dollars Projected for Month:</b>	348,004.82
	<b>Actual Dollars Used:</b>	217,501.95
	<b>Variance (Projected minus Actual):</b>	130,502.87
	<b>Reason for Variance:</b>	Costs associated with interviewing (travel, respondent payments, interviewer salary) are lower than projected due to excessive attrition during training and a very slow pace of production. We are adjusting projections.

Measures	Units at Complete	RR	HPI
<b>Current Goal:</b>	3644	varies	10.4 with screening
<b>Goal at Completion:</b>			
<b>Current Actual:</b>			18.2
<b>Estimate at Complete:</b>			
<b>Variance:</b>			

### Other Measures

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



Project Name	(STARRS-LS VA HEARTH) STARRS-LS VA - Housing, Employment, Assessment Risk, Transitions, Help (HEARTH) Project Qualitative Interviews		
Project Mode	Primary: Qualitative	Total of Modes: 1	
Project Type	Sponsored Projects		
Budget	Direct Budget: 57,655.00	Indirect Budget: 32,287.00	Total Budget: 89,942.00
Principal	James Wagner (University of Michigan - Survey Research Center)		
Investigator/Clients	Ronald Kessler (Harvard Medical School)		
Funding Agency	Department of Veterans Affairs to Harvard Medical School; University of Michigan Institute for Social Research subcontract agreement with the Harvard Medical School for performance of its assigned tasks		
IRB	HUM#: HUM00235584		Period of Approval: 6/7/2023 - 6/6/2024
Project Team	<b>Project Lead:</b> Margaret Lee Hudson <b>Budget Analyst:</b> William Lokers <b>Production Manager:</b> Jaleesa Rosario Turner <b>Senior Project Advisor:</b> Lisa S Holland <b>Production Manager 1:</b> Meredith A House <b>Production Manager 2:</b>		
Proposal #	no data		
Description	<p>The STARRS-LS collaboration with VA HEARTH (Housing Employment Assessment Risk Transitions Help) Qualitative Interviews is part of a larger project led by STARRS site principal investigator, Dr. Ron Kessler, at the Harvard Medical School (HMS). The Army Study to Assess Risk and Resilience in Servicemembers (STARRS) is a long-term prospective study (funded so far for close to 15 years) of risk and protective factors for suicidal behaviors among US Army soldiers and, in recent years, Veterans who were soldiers at the beginning of the study. One line of research in STARRS has been the development of machine learning models using information obtained while soldiers were still on active duty to predict homelessness after becoming a Veteran. The HMS STARRS team developed successful models of this sort and published the results. These publications came to the attention of VHA leadership, who approached the HMS STARRS team to establish a collaboration to use these models to target recently separated Veterans for intensive transitional services interventions designed to prevent homelessness. As part of the larger project, the HMS STARRS team will be updating the risk prediction models to be created based on a short set of self-report questions that could be embedded into a participant intake form. This intake form can then be used by VA HEARTH social workers in new samples of transitioning service members (TSMs) (not the STARRS-LS respondents) to determine which TSMs are at high risk of post-separation homelessness.</p> <p>The STARRS models were developed by working with a sample of approximately 15,000 STARRS survey respondents who were interviewed initially when they were on active duty and then followed and reinterviewed after they became Veterans. Several hundred of these STARRS Veterans became homeless after separation. A second aspect of the research is for 50-100 of these Veterans to be recruited to participate in a follow-up focused qualitative interview designed to elicit information about the ways VA might be able to improve transitional services for soldiers at high risk of homelessness after leaving active service and becoming Veterans. With a subcontract from HMS, the U-M Survey Research Center (SRC) Survey Research Operations (SRO) will recruit STARRS-LS respondents for the qualitative interviews, carry out the interviews, transcribe and de-identify the interviews, and link the de-identified/coded interview transcripts to existing de-identified/coded survey data files for these respondents. The HMS STARRS team will then carry out content analysis of these transcripts to elicit information that might help the VA HEARTH team further design their interventions.</p>		
SRO Project Period	05/2023 - 02/2024		
Data Col Period	08/2023 - 12/2023		
Security Plan	Yes		
Milestones	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
Other Project Team Members	Meredith House - STARRS LS Survey Director Margaret Hudson - Project Manager Jaleesa Rosario Turner - Scheduler 4 temp research technicians hired for qualitative interviews		
Other Project Name			
Sample Mgmt System	Other (Excel)		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	SRO Group		

Payment Type	NA			
Payment Method	NA			
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Report Period	July, 2023 (STARRS-LS VA HEARTH)		Initiation	
Risk Level	Some Concerns			
Monthly Updates	<p>? IRB approval with one contingency for obtaining a Certificate of Confidentiality (CoC) was received June 21. The CoC from NIH was received June 28 and submitted to the IRB. They removed the contingency and provided full approval on June 29. We sent the approved IRB and materials to Harvard for secondary review on June 29.</p> <p>? Nancy, Katherine, Margaret and Meredith met June 28 about the interviewer hiring posting, coordination on sample prep, interviewer access to coversheets, and other matters.</p> <p>? U-M ORSP received the sub-award from Harvard on June 15. They began processing steps and we responded to a question about the sub-contract details on June 30.</p> <p>? Margaret and Brenda prepared and posted a temporary research assistant position for the interviewers, and began the hiring and onboarding process.</p> <p>? Margaret and Jaleesa began pre-production planning including options for interview scheduling, with the goal of a mid-August production launch.</p>			
Special Issues	We continue to work through the sub-contract process with ORSP. The sub-contract has not yet been signed and therefore funds are not yet available.			
Cost as of	<b>Total Cost to Date (direct + indirect):</b>			0.00
	<b>Est Cost at Completion (E\$AC):</b>			0.00
	<b>Total Budget:</b>			89,942.00
	<b>Variance (Total Budget minus- E\$AC):</b>			0.00
	<b>Reason for Variance:</b>			
Projections as of	<b>Dollars Projected for Month:</b>			0.00
	<b>Actual Dollars Used:</b>			0.00
	<b>Variance (Projected minus Actual):</b>			0.00
	<b>Reason for Variance:</b>			
Measures		Units at Complete	RR	HPI
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
Other Measures				







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

<b>Administration</b>	SRO Group
<b>Payment Type</b>	Check, post (\$50-\$100)
<b>Payment Method</b>	Check through other system (MSMS)
<hr/>	
<b>Report Period</b>	July, 2023 (STARRS-LS Waves 3 & 4) <span style="float: right;">Implementing</span>
<b>Risk Level</b>	On Track
<b>Monthly Updates</b>	<p>Project Management and Planning:</p> <ul style="list-style-type: none"> <li>? James attended the senior leader IPR on June 27.</li> <li>? Quarterly safety plan tables were sent to USUHS for M&amp;RA/GSC on June 5.</li> <li>? We sent weekly production updates to the Pls, and reported on progress on the call with the Army/M&amp;RA.</li> <li>? Meredith created the agenda/notes and facilitated the weekly meeting with the STARRS project managers.</li> <li>? We carried out bi-weekly meetings with M&amp;RA to coordinate Safety Plan and respondent locating activities.</li> <li>? We awaited the actual Year 4 sub-award. In April, we had asked if HJF could provide a statement with the Year 4 sub-award that it does not identify Controlled Unclassified Information (CUI) and that CUI will not be passed between HJF and U-M. We hope to avoid unexpected issues like last year, where language about required CUI handling was included in the sub-award language and it significantly delayed award processing until a clarification statement about the CUI could be provided.</li> <li>o As of the end of June, we were still spending down the Year 3 award.</li> <li>? IRB: <ul style="list-style-type: none"> <li>o IRB amendments for the biosample flag/administrative data/inventory document public release were approved by the USUHS IRB on June 16.</li> <li>o The IRB amendment for adding the open-end question and heads-up message experiment was approved by the USUHS IRB on June 23.</li> </ul> </li> <li>? STARRS-affiliated, but not STARRS funded, work: <ul style="list-style-type: none"> <li>o VA/HEARTH project: <ul style="list-style-type: none"> <li>? IRB approval with one contingency for obtaining a Certificate of Confidentiality (CoC) was received June 21. The CoC from NIH was received June 28 and submitted to the IRB. They removed the contingency and provided full approval on June 29. We sent the approved IRB and materials to Harvard for secondary review on June 29.</li> </ul> </li> <li>? Nancy, Katherine, Margaret and Meredith met June 28 about the interviewer hiring posting, coordination on sample prep, interviewer access to coversheets, and other matters.</li> <li>? U-M ORSP received the sub-award from Harvard on June 15. They began processing steps and we responded to a question about the sub-contract details on June 30.</li> </ul> </li> </ul> <p>Enclave and User Support:</p> <ul style="list-style-type: none"> <li>? We continued work on necessary corrections and changes to our processing code related to the 12 NDI non-death records. As we worked on removing the 12 records from NDI deliverables, we provided the 12 MasterIDs to Harvard so they can exclude them from their NDI analyses.</li> <li>? 2023 repeat NDI search: <ul style="list-style-type: none"> <li>o Enclave staff completed the submission file for the annual search.</li> <li>o We awaited the issue of payment to be resolved by M&amp;RA and HJF/USUHS.</li> </ul> </li> <li>? Standard Enclave activities continued. These include maintaining security requirements; processing background checks and Great Lakes Cluster user access requests, drop box requests, ID swap and data transfer requests; managing software acquisition and updates; and providing user support as needed. Of particular note this month: <ul style="list-style-type: none"> <li>o Background check processing took place for a new U-M security analyst.</li> <li>o Work was completed on the requests related to the blood sample counts [by survey data collection (i.e. AAS, NSS, PPDS, SHOS-A, LS1, LS2) for the Army STARRS participants, the STARRS-LS cohort and respondents with data at ICPSR] for Dr. Ursano. We delivered an updated set of tables which include: <ul style="list-style-type: none"> <li>? Unique blood samples across NSS, PPDS, SHOS-A.</li> <li>? Unique Soldier participation across A-STARRS cohort and case-control studies.</li> <li>? A note to describe how the number of collected NSS surveys was derived.</li> <li>? There were no biomarker group requests for assistance in June.</li> </ul> </li> </ul> </li> </ul> <p>Public Use Data:</p> <ul style="list-style-type: none"> <li>? Wave 3: <ul style="list-style-type: none"> <li>o Members of the team met with ICPSR on June 2 to review the LSW3 public release timeline and status of tasks/materials.</li> <li>o We prepared the final dataset including disclosure analysis and discovered that the rank question response categories contain more detail than when last asked during PPDS.</li> <li>? We reached out to ICPSR to ask if they would recommend collapsing them. They recommended collapsing given STARRS has the data available via secure download in addition to the Virtual Data Enclave (VDE).</li> <li>? We discussed with Harvard and determined the rank variable should be collapsed the same way as previous public deliverables.</li> <li>o The LSW3 dataset is on track for delivery to ICPSR in early July.</li> <li>? Biosample flags, administrative variables, and inventory document: <ul style="list-style-type: none"> <li>o IRB approval was received from USUHS. The Enclave team will shift attention to this public deliverable after the LSW3 public deliverable is settled and in ICPSR's hands.</li> <li>? We awaited decisions from the Army/GSC on producing the genetic and bioassay files for public use and placing data in the NIH National Data Archive and Public use release for GWAS.</li> </ul> </li> </ul> </li> </ul> <p>Wave 4 Production Updates:</p> <ul style="list-style-type: none"> <li>? Wave 4 production statistics, as of July 3, 2023, are as follows: <ul style="list-style-type: none"> <li>o Replicates released: 7 of 14 released with 7,327 sample lines.</li> <li>o Completed interviews: 5,127 (4,836 web; 291 phone).</li> <li>o Replicate 6 transitioned to Phase 4 on Saturday, June 17. The response rate is currently 71.6% and trending with the average response rate.</li> <li>o Replicate 7 moved to Phase 3 on June 29 and started receiving phone calls. The response rate is currently 45.9% and also tracking with the average response rate.</li> <li>o The response rate for completed replicates (Reps 1-5) is 74.9%.</li> </ul> </li> </ul> <p>Safety Plan Results:</p> <ul style="list-style-type: none"> <li>? The Wave 4 Safety Plan rate is 11.1% as of July 3.</li> </ul>
<b>Special Issues</b>	

Cost as of Jun 14, 2023	Total Cost to Date (direct + indirect):			8,268,726.66
	Est Cost at Completion (E\$AC):			12,833,907.51
	Total Budget:			12,809,390.00
	Variance (Total Budget minus- E\$AC):			-24,517.51
	Reason for Variance:			In June, we projected \$337,580.22 and spent \$311,480.81 (\$26,099.41 less). Before updating the projections, the projected overrun was \$8,992.35, which was \$35,847.19 less than last month. Bill said the difference of ~\$9,800 came from a decrease in Survey Tech salaries and fringes. Projections updates for the month included increasing the statistician lead hours from 40 to 50 per month from August 2023 - June 2024. After this change, the final projected overrun is \$24,517.51 (compared to \$44,839.54 last month).
Projections as of Jun 14, 2023	Dollars Projected for Month:			337,580.22
	Actual Dollars Used:			311,480.81
	Variance (Projected minus Actual):			26,099.41
	Reason for Variance:			In general, spending was under in main data collection including interviewer and TL hours.
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

## Developmental/Initiative Projects Dashboard

### NonArchived Development Initiative and No-DataCol Projects

Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr	May	Jun	Jul
<i>TSME24 Blaise 5 version and system testing (423562)</i>	Initiatives		Karl A Dinkelmann	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>TSME24 CTT maintenance &amp; upgrades (483424)</i>	Initiatives		Karl A Dinkelmann	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>TSME24 DCO System Support (483248)</i>	Initiatives	Implementing	Vivienne Y Outlaw	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<i>TSME24 MSMS performance work (425267)</i>	Initiatives	Implementing	Jim Rodgers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<i>TSME24 MSMS Working Group (425197)</i>	Initiatives	Implementing	Kelly A Chatain	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<i>TSME24 QC Systems (483249)</i>	Initiatives		Sarah Elisa Broumand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>TSME24 SRO System Maintenance - General (483910)</i>	Initiatives	Implementing	Jeffrey L Smith	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<i>TSME24 SSL Autoscheduler interface development (42</i>	Initiatives	Implementing	Debbie Seale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<i>TSME24 STrak: Migration to SQL Anywhere V17 (</i>	Initiatives	Planning	Lawrence Daher	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Project Name	(TSME24 DCO System Support (483248)) TSME24 DCO System Support (483248)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 1.00	Indirect Budget: 0.00	Total Budget: 1.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Vivienne Y Outlaw		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	To be determined		
SRO Project Period	07/2023 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start:   Pretest End:   Staffing Complete:   SS Train Start:   DC Start: </div> <div> Pretest Start:   Recruitment Start:   GIT Start:   SS Train End:   DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
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	July, 2023 (TSME24 DCO System Support (483248))	Implementing	
Risk Level	Some Concerns		
Monthly Updates	1. Finish the RWA/FWA pdf upload module and processed all the forms from FOTY 2. Finish the batch Photo logging module. 3. Continue to work on the migration of DCO Recruitment website suites. 4. Set up new Generic Screener for DCSR with new screening questions. 5. Modify the salary checking page (from iwer website)		
Special Issues	Beginning to plan for integration of FRED with new ATS		
Cost as of Jul 31, 2023	Total Cost to Date (direct + indirect):	1,611.95	
	Est Cost at Completion (E\$AC):	36,312.32	
	Total Budget:	1.00	
	Variance (Total Budget minus- E\$AC):	1,312.32	
	Reason for Variance:		
Projections as of Jul 31, 2023	Dollars Projected for Month:	0.00	
	Actual Dollars Used:	1,611.95	
	Variance (Projected minus Actual):	1,611.95	
	Reason for Variance:	work done prior to the release of the budget	

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

Other Measures

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Project Name	(TSME24 MSMS performance work (425267)) TSME24 MSMS performance work (425267)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 1.00	Indirect Budget: 0.00	Total Budget: 1.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Jim Rodgers		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	To be determined		
SRO Project Period	07/2023 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start:   Pretest End:   Staffing Complete:   SS Train Start:   DC Start: </div> <div> Pretest Start:   Recruitment Start:   GIT Start:   SS Train End:   DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
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	July, 2023 (TSME24 MSMS performance work (425267))		Implementing
Risk Level	On Track		
Monthly Updates	No activity for month		
Special Issues			
Cost as of Jul 31, 2023	Total Cost to Date (direct + indirect):		0.00
	Est Cost at Completion (E\$AC):		0.00
	Total Budget:		1.00
	Variance (Total Budget minus- E\$AC):		0.00
	Reason for Variance:		
Projections as of Jul 31, 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	(TSME24 MSMS Working Group (425197)) TSME24 MSMS Working Group (425197)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 15,000.00	Indirect Budget: 0.00	Total Budget: 15,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Kelly A Chatain		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	To be determined		
SRO Project Period	07/2023 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start:   Pretest End:   Staffing Complete:   SS Train Start:   DC Start: </div> <div> Pretest Start:   Recruitment Start:   GIT Start:   SS Train End:   DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
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	July, 2023 (TSME24 MSMS Working Group (425197))	Implementing	
Risk Level	On Track		
Monthly Updates	Scheduling meetings with Protocol Summary & Testing Group as well as Data Specification Group. Review of documents from 2022. Planning updates for MSMS Documentation website.		
Special Issues			
Cost as of Aug 22, 2023	Total Cost to Date (direct + indirect):		87.29
	Est Cost at Completion (E\$AC):		14,961.40
	Total Budget:		15,000.00
	Variance (Total Budget minus- E\$AC):		38.60
	Reason for Variance:		Delayed scheduling.
Projections as of Aug 22, 2023	Dollars Projected for Month:		0.00
	Actual Dollars Used:		87.29
	Variance (Projected minus Actual):		-87.29
	Reason for Variance:		Delayed scheduling.

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

Other Measures

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Project Name	(TSME24 SRO System Maintenance - General (483910) ) TSME24 SRO System Maintenance - General (483910)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 1.00	Indirect Budget: 0.00	Total Budget: 1.00
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:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	Pending input from Manager		
SRO Project Period	07/2023 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start:   Pretest End:   Staffing Complete:   SS Train Start:   DC Start: </div> <div> Pretest Start:   Recruitment Start:   GIT Start:   SS Train End:   DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
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	July, 2023 (TSME24 SRO System Maintenance - General (483910) )		Implementing
Risk Level	On Track		
Monthly Updates	ST Employee Data Merge (fixed) ST/PB Build Team meetings ( include Pam S. Marsha S, Ashwin D, Jeff S, & Holly A.) STTM enhancement Show Password in SurveyTrak ( feature ) Migrate DB Reconcile (fixed) New listing PBD ( updated ) Listing data dictionary ( documentation ) SSL Batch Remove ( updates )		
Special Issues			
Cost as of Aug 14, 2023	Total Cost to Date (direct + indirect):	20,000.00	
	Est Cost at Completion (E\$AC):	22,526.53	
	Total Budget:	1.00	
	Variance (Total Budget minus- E\$AC):	-2,526.53	
	Reason for Variance:		
Projections as of Aug 14, 2023	Dollars Projected for Month:	0.00	

<i>Actual Dollars Used:</i>	2,700.27
<i>Variance (Projected minus Actual):</i>	-2,700.27

*Reason for Variance:* No tasks were projected for July.

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	(TSME24 SSL Autoscheduler interface development (42) TSME24 SSL Autoscheduler interface development (423463))		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 5,000.00	Indirect Budget: 0.00	Total Budget: 1.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Debbie Seale		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1: Elizabeth Ohryn		
	Production Manager 2:		
Proposal #	no data		
Description	Continued development and implementation of the SSL autoscheduler. Two primary components are outstanding: 1) Interface for SSL staff to be able to load and complete the initial scheduling run without the assistance of DMSS; 2) Implementation of a "freeze and re-run" protocol. The focus in this fiscal year will be on the freeze and re-run protocol, which allows us to optimize shift assignments. Getting the first part set up to allow SSL staff to run the scheduling process independently of DMSS will take additional programming effort.		
SRO Project Period	07/2023 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start:   Pretest End:   Staffing Complete:   SS Train Start:   DC Start: </div> <div> Pretest Start:   Recruitment Start:   GIT Start:   SS Train End:   DC End: </div> </div>		
Other Project Team Members	Wen Chang; Hueichun Peng; Ji Qi		
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	July, 2023 (TSME24 SSL Autoscheduler		Implementing
Risk Level	On Track		
Monthly Updates	We are regrouping and expect to complete Phase I of the Auto Scheduler interface by January 2024. Generally on track.		
Special Issues			
Cost as of Jul 31, 2023	Total Cost to Date (direct + indirect):		0.00
	Est Cost at Completion (E\$AC):		0.00
	Total Budget:		1.00
	Variance (Total Budget minus- E\$AC):		0.00
	Reason for Variance:		No charge by DMSS in July.
Projections as of Jul 31, 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

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Project Name	(TSME24 STrak: Migration to SQL Anywhere V17 () TSME24 STrak: Migration to SQL Anywhere V17 (483227))		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 10.00	Indirect Budget: 0.00	Total Budget: 10.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Lawrence Daher		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	To be defined		
SRO Project Period	07/2023 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start:   Pretest End:   Staffing Complete:   SS Train Start:   DC Start: </div> <div> Pretest Start:   Recruitment Start:   GIT Start:   SS Train End:   DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
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	July, 2023 (TSME24 STrak: Migration to SQL Anywhere V17 (483227))		Planning
Risk Level	On Track		
Monthly Updates	Planning meetings began in August.		
Special Issues	N/A		
Cost as of Aug 14, 2023	Total Cost to Date (direct + indirect):		0.00
	Est Cost at Completion (E\$AC):		29,739.34
	Total Budget:		10.00
	Variance (Total Budget minus- E\$AC):		260.66
	Reason for Variance:		Starting stage
Projections as of Aug 14, 2023	Dollars Projected for Month:		0.00
	Actual Dollars Used:		0.00
	Variance (Projected minus Actual):		0.00
	Reason for Variance:		Starting stage

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

Other Measures

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