Survey Research Operations

Monthly Project Report

Sponsored Data Collection Projects and Development Initiative

September 2023

Sponsored Data Collection Projects and Development Initiative Projects

(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

(IHDS3) India Human Development Survey Wave 3

(LHMS 2023 Fall) Life History Mail Study Fall 2023

(LHMS 2023 Spring) Life History Mail Study Spring 2023

(MI CReSS (Year 3 & 4)) 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 2022-27

(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 QC Systems (483249)) TSME24 QC Systems (483249)

(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	Aug	Sep
AFHS-Additional work	Sponsored	Closing	Rebecca Gatward	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
ANES 2024	Sponsored	Implementing	Andrew L Hupp	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟡
BFY	Sponsored	Implementing	Piotr Dworak	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
BHM Library Project	Sponsored	Implementing	Karin Schneider	🟢	🟢	🟡	🟡	🟡	🟡	🟢	🟢	🟡
CAMS 2023	Sponsored	Implementing	Gloria J Baker	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢
Care & Help Study	Sponsored	Implementing	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	Closing	Shonda R Kruger-Ndiaye	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
EDC-Endline	Sponsored	Closing	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 Fall	Sponsored	Implementing	Gary Hein	☐	☐	☐	☐	☐	☐	☐	☐	🟢
LHMS 2023 Spring	Sponsored	Implementing	Gary Hein	☐	☐	☐	☐	🟢	🟢	🟢	🟡	🟢
MI CReSS (Year 3 & 4)	Sponsored	Implementing	Timothy Prand	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
MTF Base Year 2022_27	Sponsored	Planning	Rebecca Gatward	🟢	🟢	🟢	🟢	🟡	🟢	🟢	🟢	🟢
MTF Panel 2022-27	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
PR-PSID	Sponsored	Implementing	Camila Kendall	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
PSID CDS 2023	Sponsored	Initiation	Piotr Dworak	🟡	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
PSID TAS 2023	Sponsored	Planning	Elizabeth Ohryn	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢
PSID23	Sponsored	Implementing	Rachel Anne Orlowski	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
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	Implementing	Margaret Lee Hudson	☐	☐	☐	☐	☐	☐	🟡	🟡	🟡
STARRS-LS Waves 3 & 4	Sponsored	Implementing	Meredith A House	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Other Project Team Members	Grant Benson Senior Project Advisor Wen Chang DMSS (inc.Dashboard) Raphael Nishimura DMSS (sample selection and Weights) Rebecca Gatward Survey Director James Rodgers Technical lead/MSMS lead Lloyd Hemingway Production Manager Dean Stevens Financial Analyst Andrew Hupp MSMS and Web survey expertise Deborah Wilson Help Desk Colette Keyser Blaise programmer (inc. Portal) Laura Yoder and Rose Zydel Data Managers
Other Project Name	'A More Efficient Web-Based Approach to Collecting National Family, Fertility and Reproductive Health Data'.
Sample Mgmt System	MSMS; Project specific system (For non-response follow-up we will just use Excel.)
Data Col Tool	Blaise 5
Hardware	Paper and Pencil
DE Software	External vendor (Data Force)
QC Recording Tool	N/A
Incentive	Yes, R; Yes, Other (for non-response follow-up we will use a non-monetary incentive.)
Administration	SRO Group
Payment Type	Check, post ($10); Other (Non-monetary incentive)
Payment Method	Check through other system (RPay (MSMS))

Report Period	Sep, 2023 (AFHS-Additional work)	Closing
Risk Level	On Track	
Monthly Updates	September Update No further work is planned for this piece of the AFHS. There are still ~$75 in uncashed checks that could be credited in Oct. The accounts will be closed after this.	
Special Issues		
Cost as of Oct 17, 2023	*Total Cost to Date (direct + indirect):*	57,754.07
	Est Cost at Completion (E$AC):	57,734.07
	Total Budget:	50,265.00
	Variance (Total Budget minus- E$AC):	-7,469.07
	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 a few hours in August and the $340 credit was uncashed checks ($10) sent to respondents during the feasibility study last year. There is a total of $850 in uncashed checks that could be credited - the majority will be credited by end August but two were issued in early September and one in December.
Projections as of Oct 17, 2023	*Dollars Projected for Month:*	-151.55
	Actual Dollars Used:	-76.32
	Variance (Projected minus Actual):	-75.23
	Reason for Variance:	I charged a couple of hours for reviewing draft post review edits to a paper. We received $450 credit for uncashed cheques.

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

Other Measures

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

Other Measures

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

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

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

Report Period	Sep, 2023 (ANES 2024)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Invitation letters were mailed to the first 2,500 addresses on 9/8. The in-person interviews began the following week. To date we have done 135 in-person interviews and 9 video interviews. Andrew will have a discussion with project staff about how to focus the resources moving forward. Only 81 (60%) of the completed in-person interviews have scheduled an appointment for the video interview (a finding). To date we've had 15 video appointments with 9 completed video interviews (60%) (another finding) At this pace it seems like 150 video interviews will be unattainable. The remaining 3,500 letters were assembled. It's looks unlikely that we will need to send them, but they are ready in the event we do. ANES staff delivered the content video interview on 9/15. Project staff was interested in the timing of some of the questions, so it was programmed in Qualtrics by EJ. The interviewers were trained prior to the appointments of the first video interviews on October 5. A portion of them have asked for a follow-up training that the Help Desk is	

conducting on 10/17. We made the decision to use the laptop for the Qualtrics instrument and Zoom. The windows for each application will be split on the laptop screen.

Special Issues		
Cost as of Oct 17, 2023	*Total Cost to Date (direct + indirect):*	69,606.29
	Est Cost at Completion (E$AC):	211,783.34
	Total Budget:	7,024,812.00
	Variance (Total Budget minus- E$AC):	115.66
	Reason for Variance:	
Projections as of Oct 17, 2023	*Dollars Projected for Month:*	60,337.24
	Actual Dollars Used:	45,882.30
	Variance (Projected minus Actual):	14,454.94
	Reason for Variance:	Interviewing time in September was over projected (due to how pay periods fell).

Measures		Units at Complete	RR	HPI
	Current Goal:	200/160		
	Goal at Completion:			
	Current Actual:	135/9		
	Estimate at Complete:			
	Variance:			

Other Measures

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

The study's full name, listed on sub-contract documents, is Household Income and Child Development in Early Years. The study will draw on a convenience sample of mothers and their newborns in four US metropolitan areas: New York City; Omaha/Lincoln; New Orleans; and Minneapolis. One or two hospitals, listed in this application, will be used as recruiting sites in each area. The study uses a randomized control trial design in which low-income mothers and newborns will be randomly assigned to a treatment group that receives an unconditional income enhancement -- cash payments of $333 per month—an amount roughly comparable to a variety of income assistance policies in the U.S. and shown to be associated with meaningful improvements for poor children in prior studies—or to a control condition that receives $20 per month. In both groups, the payments will be made for the first 40 months of the child's life. To understand the impacts of added income on children's development, researchers will assess treatment/control group differences at ages 1, 2 and 3 on measures of cognitive, language, memory, self-regulation and socio-emotional development. Recruitment is scheduled to start in April of 2018, and each follow-up interview will be conducted 12 months later -- close in time to the child's 1st, 2nd, and 3rd birthday. The feasibility of the approach has been established in a one-year pilot conducted in 2014 at the New York Presbyterian Hospital/Columbia University Medical Center.

The Principal Investigators are Dr. Greg Duncan from University of California Irvine (UCI), Dr. Kimberly Noble from Teacher's College Columbia University (TCCU), and Katherine Magnuson from University of Wisconsin-Madison (UWM). UCI (Dr. Duncan) and TCCU (Dr. Noble) are the institutions and signatories funding the U-M SRC subcontract from various sources including the National Institute for Child Health and Human Development (NICHD) and private foundations listed in this application. The study research team also includes co-investigators Lisa Gennetian (New York University), and Hiro Yoshikawa (New York University).

SRO will be responsible for four interactions with the selected mothers/infants:
• Baseline will occur immediately (within 24-48 hours) after birth, in the hospital;
• Wave 1 will be a telephone interview with the mother when the child is 12 months old;
• Wave 2 will be an in-person interview in the family's home that includes survey, developmental assessment, biomarker collection, and video recorded behavioral interaction when the child is 24 months old;
• Wave 3 will be an in-person survey done while the mother and child are visiting a lab for other clinical tests when the child is 36 months old.

Each data collection phase/wave will be a full 12 months, with Baseline starting in April 2018:

Recruitment/Baseline: 04/01/2018 - 03/31/2019
        Wave 1: 04/01/2019 - 03/31/2020
        Wave 2: 04/01/2020 - 03/31/2021
        Wave 3: 04/01/2021 - 03/31/2022

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

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

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

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

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

Monthly Updates	BFY Age 5- 8:

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

As part of that effort, we also started sending a 5-year birthday postcard to the focal children. No other data collection is planned at the moment.

BFY received continuing approval from TCCU and U-M IRBs extending the project through September 2024.

Age 0 - 4 Update:

Between 2018 and 2022, and in Age 4 2022 - 2023, SRO Interviewrer effort was the main contributing factor allowing PI teams to reach and exceed the desired 80% response rate at the end of the study.

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

Technical system:
All tech systems are working as needed.

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

Special Issues	

Cost as of		
	Total Cost to Date (direct + indirect):	7,489,364.23
	Est Cost at Completion (E$AC):	8,620,990.85
	Total Budget:	7,837,861.73
	Variance (Total Budget minus- E$AC):	-783,129.12
	Reason for Variance:	Finance is working on formally extending the contract -- the total budget amount does not yet reflect the additional 1.3M in funding hence it looks like we are overruning while in fact we are underruning.

Projections as of	**Dollars Projected for Month:**			23,791.97
	Actual Dollars Used:			22,986.23
	Variance (Projected minus Actual):			805.74
	Reason for Variance:	Reduced underrun as we entered the new projections.		

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

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

| | **Variance:** | | | |

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

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

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

Report Period	Sep, 2023 (BHM Library Project)	Implementing
Risk Level	Some Concerns	
Monthly Updates	SRO continues to assist with the main task that is in the research team's workscope - lookup of library email contact information. We are testing the pilot 1 questionnaire.	
Special Issues	No new special issues.	
Cost as of Oct 11, 2023	*Total Cost to Date (direct + indirect):*	28,821.58
	Est Cost at Completion (E$AC):	201,854.44
	Total Budget:	197,671.00
	Variance (Total Budget minus- E$AC):	-4,183.44
	Reason for Variance:	I am being conservative on projections and am still projecting programming hours that we may not need if the level of questionnaire complexity stays where it is.
Projections as of Oct 11, 2023	*Dollars Projected for Month:*	16,721.02

	Actual Dollars Used:			6,834.14
	Variance (Projected minus Actual):			9,886.88
	Reason for Variance:	We are under monthly projections as we are mainly using PDMG hours rather than any TSG support.		

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

Other Measures

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

Project Name	**(CAMS 2023) HRS 2023 Consumption and Activity Mail Study (On Track)**
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			
Pre Production Start: 06/26/2023		***Pretest Start:***	
Pretest End:		***Recruitment Start:***	
Staffing Complete:		***GIT Start:***	
SS Train Start:		***SS Train End:***	
DC Start: 10/04/2023		***DC End:*** 04/30/2024	

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	Sep, 2023 (CAMS 2023)	Implementing
Risk Level	On Track	
Monthly Updates	During the month of September, the team worked with Dataforce to ensure they had all sample file, final sign off on R material and SAQ proofs, and respondent checks in preparation for the first mailing. Decision was made to delay CAMS initial mailing by 4 days due to an IRB delay and UM internet outage. Current progress for CAMS: 1. 1st mailing dropped on October 4. Subsequent mailings on Nov 1, Nov 15, and Nov 29. 2. Logger training was 10/18. Sharing logging staff with HRS and LHMS. 3. Mistakenly overlooked request of "S" to be printed on Spanish barcodes. Will print labels with barcode and S and place on Spanish SAQs are the arrive. S will be put on future mailings. 4. Spouse checks printed as $25 instead of $10. Reprinted and sent to DF. Incorrect checks have been voided. 5. Over 650 SAQs/returned mail received as of 10/18.	
Special Issues	- Short delay (4 business days) delay to IRB and UM internet outage.	
Cost as of Oct 17, 2023	***Total Cost to Date (direct + indirect):***	263,382.67
	Est Cost at Completion (E$AC):	408,165.12

	Total Budget:			473,136.00
	Variance (Total Budget minus- E$AC):			64,970.88
	Reason for Variance:	The variance is primarily due to staff assigned to the project compared to budgeted resources. The difference between the August and September variance: The cost report with August actuals had the overpayment of the spouse TOAs. The cost report with the September actuals reflects the additional printing for the correct amount of spousal TOAs ($18k) and the void of the overpayment ($45k). Also, we did not get billing from DF as projected so that has been pushed forward		
Projections as of Oct 17, 2023	**Dollars Projected for Month:**			18,060.60
	Actual Dollars Used:			31,392.48
	Variance (Projected minus Actual):			-13,331.88
	Reason for Variance:	Rpay costs hit in August instead of September as projected.		

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) (On Track)		
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	*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	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	Sep, 2023 (Care & Help Study)	Implementing
Risk Level	On Track	
Monthly Updates	No project related work for SRO in September. Projections are being added for October through the end of the project period. The PI is awaiting a decision on additional funding for 4 more focus groups to be added, with funding beginning in November 2023. The PI also presented initial information from the focus groups as part of the ISR Insights Seminar Series.	
Special Issues		
Cost as of Oct 17, 2023	*Total Cost to Date (direct + indirect):*	2,183.01
	Est Cost at Completion (E$AC):	2,183.01

	Total Budget:		27,236.00
	Variance (Total Budget minus- E$AC):		25,052.99
	Reason for Variance:	Projections not yet entered into CRS; will be entered for October.	
Projections as of Oct 17, 2023	Dollars Projected for Month:		0.00
	Actual Dollars Used:		328.55
	Variance (Projected minus Actual):		-328.55
	Reason for Variance:	Hours used by Hudson for reporting and Remmert for cost reports; projections not previously entered into CRS.	

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

Other Measures

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

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

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

Report Period	Sep, 2023 (CARE Military)	Implementing
Risk Level	On Track	
Monthly Updates	1. Project Management:	

- SRO Military project Wave 2 ended on 8/31/203.

2. Care SMS system: N/A

3. Questionnaire Development – N/A

4. Production:
- Production ended on 8/31/2023

5. Hiring and Training – N/A

6. DMSS:
- SRO has been waiting for final reports from QG due to being delayed by internet outage

7. Locating N/A

Special Issues			
Cost as of Sep 30, 2023	*Total Cost to Date (direct + indirect):*		1,684,503.13
	Est Cost at Completion (E$AC):		1,684,503.13
	Total Budget:		1,685,902.70
	Variance (Total Budget minus- E$AC):		1,399.57
	Reason for Variance:		The interviewer hours transfer from Military to Civilian completed. However, the current small amount of underrun will be adjusted after all expenses related to Military closes.
Projections as of Sep 30, 2023	*Dollars Projected for Month:*		72,625.60
	Actual Dollars Used:		73,396.14
	Variance (Projected minus Actual):		-770.54
	Reason for Variance:		Iwer used more hours than we projected for the closing project effort.

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

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

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

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

Payment Method	Check through other system (UM)	

Report Period	Sep, 2023 (CARE SALTOS MTEC)	Implementing
Risk Level	On Track	
Monthly Updates	1. Project Management: - SRO team attended the annual CARE Investigators Conference in Chicago in Sept. 2023. - SRO continued to work with the PI team to handle samples shifting issues and solutions. - 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 continued to work with the PI teams and the QG on resolving technical issues. - SRO continued to refine system with QG 3. Questionnaire Development –N/A 4. Production: -Completed a production challenge event successfully -Continued to find solutions to receive production report from QG since UM campus wide internet outage. -SRO has been working with the PI team on handling TOA issues. -SRO is expected to receive release #4 (4251) civilian sample in Sept 2023 - Worked with TSG staff to restore VPN connections for the field iwers due to UM campus wide internet outage. 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 locating team worked 152 lines and found 8 R's.	

Special Issues

Cost as of Sep 30, 2023	Total Cost to Date (direct + indirect):	1,344,318.30
	Est Cost at Completion (E$AC):	4,685,352.22
	Total Budget:	4,685,914.00
	Variance (Total Budget minus- E$AC):	561.78
	Reason for Variance:	The transfer of interviewer hours has been processed and we ended exactly where we wanted to be with a very small underrun on Civilian.
Projections as of Sep 30, 2023	Dollars Projected for Month:	10,656.72
	Actual Dollars Used:	14,744.25
	Variance (Projected minus Actual):	-4,087.53
	Reason for Variance:	The transfer of interviewer hours has been processed. Actual dollars for September were higher than projections due to increased interviewer rates and non-direct cost inflation increased.

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 (Some Concerns)		
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	*Pre Production Start:*	*Pretest Start:*
	Pretest End:	*Recruitment Start:*
	Staffing Complete:	*GIT Start:*
	SS Train Start:	*SS Train End:*
	DC Start:	*DC End:*

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

Report Period	Sep, 2023 (CCS)	Implementing
Risk Level	Some Concerns	
Monthly Updates	? Data management: o Due to a security threat in late August, U-M froze all online activity, including data transfers using sFTP sites; so, in early September, Jeffrey and Vero set up a secure data transfer plan, using Dropbox to transfer student contact information from TC to SRC. o Ed reviewed all sample listings and worked on reconciling the complex data, e.g., identifying duplicates and sample respondents. ? Survey programming: o Marsha programmed the Spanish survey translation and coordinated supplemental translations with Meredith based on updates provided by the research team, which Liliana tested in Qualtrics. o Consent form o The final Wave 1 survey was roughly 5,200 words long. Translation was budgeted at $0.19 per word but costed $0.52 per word using Research Support Services (recommended by PDMG Admin). The total budget for translation was $2,000 but ended up being $2,700 in Wave 1, plus $332 for in-house translation support services, so a total of $3,032.	

? Survey testing:
o Steven conducted survey testing with help from the Survey Services Lab Help Desk and Lilianna (Spanish testing).
? Incentive processing:
o Becky worked with the ISR Business Office to get set up to send Visa electronic gift cards to respondents. While processing the first file, the Business Office informed the operations team that the payment tier was not indicated in the U-M IRB-HSBS eresearch system, which prevented HSIP from processing the gift cards. Jeffrey updated the U-M proposal, which was quickly approved by IRB.
o Each business day, Becky processed gift card files with the Business Office. She processed 2,701 gift cards in September.
o Initially, Becky manually cleaned respondent contact information for gift card processing; so, Ed developed a process to automate several steps of that process, e.g., removing duplicates, correcting wrong email domains, and correcting address formats.
? CCS inbox management:
o Jeffrey worked with Steven to draft templates for responding to respondent emails.
o Steven responded to roughly 100 respondents who reached out for help locating/accessing their gift cards.
? Reporting:
o Jeffrey created the CCS Production Timeline to keep track of emails sent and forecast production plans.
o Jeffrey provided weekly production reports to the research team.
o Several things complicated the data management and response rate calculations, including multiple links per respondent and a QR code to access the survey and duplicate link IDs in Qualtrics.
? After the first week of data collection, the research team found that students were not checking their college emails and so not seeing their survey invitations. To increase the likelihood that students would see our emails, the research team requested to send the invitations to students' personal email addresses, which the colleges provided. Due to limitations in Qualtrics, Jeffrey had to create a new email distribution to the personal emails.
? Texting setup:
o Upon PI request, Steven investigated SRO texting options, e.g., cost per text, how long to set up account, character limits, and text quantity limits.

Special Issues	To improve the response rate, the researchers want to send an email in Spanish and possibly one text message. The TCCU IRB is still reviewing the request. Aerialink and Web SMS are ready to go. Data collection in Wave 1 is being extended to mid-November to give the researchers time to visit more classes and IRB time to approve the text message and Spanish email. The setback timeline would also push Wave 2 data collection to mid-February or March, which would be welcome by the SRO team by freeing up extra resources. The PIs also want to email all respondents to ask about the status of their gift cards in order to mend any negative feelings due to slow gift card receipt. After a very difficult back-and-forth with the Business Office, we have received the activation statuses of about 4,000 cards and found that 46% still haven't activated. So, Grant and Jeffrey are hoping to focus the outreach on those who have not yet activated their cards, rather than everyone who has completed. If the PIs opt to message everyone, then they might coordinate that effort, but more likely, CCS would need extra resources (SSAs) to respond in a timely manner to inquiries. Another concern is that data management has been slow to meet the needs of the project and are still lagging. This is in part due to the complex data structure and possibly also due to the DM being new to SRO. We anticipate that the data will get even more complex, as we extend Wave 1 data collection (e.g., requiring new survey links for thousands of respondents and more using the QR code).

Cost as of Oct 16, 2023		
	Total Cost to Date (direct + indirect):	139,360.35
	Est Cost at Completion (E$AC):	647,592.39
	Total Budget:	644,889.00
	Variance (Total Budget minus- E$AC):	-2,703.39
	Reason for Variance:	Data management has been difficult due to the complex nature of the data, and Ed has needed extra support from Jennie. The researchers continue to request more information on gift card processing, which has taken considerable effort from Jeffrey and Grant. Steven has been responding to respondent inquiries about their gift cards. Respondent payments have exceeded the Wave 1 budget as expected (the PIs know we will charge the extra TOA funds and have approved). Programming effort was also higher than projected, due to last minute changes to the survey from the PIs.

Projections as of Oct 16, 2023	*Dollars Projected for Month:*	87,160.05
	Actual Dollars Used:	99,034.39
	Variance (Projected minus Actual):	-11,874.34
	Reason for Variance:	Respondent payments were $7,400 more than projected. Effort to look into respondent payments (see Special Issues section) has been high and was not projected. Spanish translation costs were higher than expected (see Monthly Updates section).

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

Other Measures

Project Name	(DCUS) Daily Cannabis Use Study (On Track)		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 49,742.00	**Indirect Budget:** 0.00	**Total Budget:** 49,742.00
Principal	Brady West (ISR)		
Investigator/Clients	Sean McCabe (ISR)		
Funding Agency	National Institutes of Health (NIH)		
IRB	**HUM#:** HUM00229404		**Period of Approval:** Pending
Project Team	**Project Lead:** Gary Hein		
	Budget Analyst: David Kellermeyer		
	Production Manager:		
	Senior Project Advisor: Rebecca Gatward		
	Production Manager 1: Rebecca Loomis		
	Production Manager 2:		
Proposal #	no data		
Description	This study aims to decipher the daily motives for cannabis use among light and heavy cannabis users, and their associations for longer-term use behaviors. We will recruit 50 cannabis users via the MICHR database and assign them to into groups of 25 'light' users and 25 'heavy' users based on a screener survey. Selected candidates will be asked to complete a baseline survey of about 10 or 15 minutes, 28 daily surveys of about 5 minutes, and a follow up survey of 15-20 minutes. Respondents will be paid up to $96 for participating ($2 per daily survey completion for up to 28 days, $20 for the baseline survey completion and $20 for the follow up survey completion).		
SRO Project Period	01/2023 - 10/2023		
Data Col Period	08/2023 - 10/2023		
Security Plan	Yes		

Milestones	**Pre Production Start:** 01/17/2023	**Pretest Start:**
	Pretest End:	**Recruitment Start:** 06/28/2023
	Staffing Complete:	**GIT Start:**
	SS Train Start:	**SS Train End:**
	DC Start: 08/15/2023	**DC End:** 10/15/2023

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

Report Period	Sep, 2023 (DCUS)	Implementing
Risk Level	On Track	
Monthly Updates	September activities: 1- Meetings with PIs and SRO team to discuss project updates and fielding plans. 2- Sent 26 daily surveys and reminders to respondents 3- Programmed and developed testing plan for follow-up survey	
Special Issues		
Cost as of Oct 09, 2023	**Total Cost to Date (direct + indirect):**	26,061.45
	Est Cost at Completion (E$AC):	33,563.68

	Total Budget:			49,742.00
	Variance (Total Budget minus- E$AC):			16,178.32
	Reason for Variance:	Differences in between proposed and projected scope:		

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

Projections as of Oct 09, 2023	*Dollars Projected for Month:*	8,912.79
	Actual Dollars Used:	2,162.36
	Variance (Projected minus Actual):	6,750.43
	Reason for Variance:	$6880 in respondent incentives will not hit cost sheet until October.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	1050 daily	100% Bsln, 75% Other	N/A
	Goal at Completion:	1050 daily	75% Daily	
	Current Actual:	1363 daily	100% Bsln, 97% Daily	
	Estimate at Complete:	1363 daily	97% Daily	
	Variance:	313	22%	
Other Measures	Baseline fielding in August, with daily surveys and follow-up instrument after that.			

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

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

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

Other Project Name

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

Report Period	Sep, 2023 (ECHO (Year 7))		Closing
Risk Level	On Track		
Monthly Updates	The September cost report should be our last but I need to confirm with FSG that all final costs have hit.		
	Production stats were final as of the July report and have not changed, so are not being re-reported here.		
Special Issues			
Cost as of Oct 17, 2023	***Total Cost to Date (direct + indirect):***		508,372.37
	Est Cost at Completion (E$AC):		508,372.37
	Total Budget:		525,576.00
	Variance (Total Budget minus- E$AC):		17,203.63
	Reason for Variance:	See descriptions in previous reports. Note: $47,125 Dir was transferred from SRO to the Batterman Lab (U-M). This was initiated in late April and processed in late July.	
Projections as of Oct 17, 2023	***Dollars Projected for Month:***		1,262.95
	Actual Dollars Used:		3,008.43
	Variance (Projected minus Actual):		-1,745.48
	Reason for Variance:	This report may reflect final costs. I suspect either Iwer or TSG close-out costs came in higher than anticipated. I will confirm this when I receive the Sept cost report. Note: The U-M internet outage disrupted some final close-out steps but the effects were likely hours that could not hit the project due to our August end date for charges.	

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

Other Measures

Project Name	**(EDC-Endline) Every Dollar Counts Endline (On Track)**
Project Mode	Primary: Telephone Secondary: Face to Face Total of Modes: 2
Project Type	Sponsored Projects
Budget	**Direct Budget**: 2,382,700.00 **Indirect Budget:** 714,811.00 **Total Budget:** 3,097,511.00
Principal	Stephanie Chardoul (SRO)
Investigator/Clients	Sarah Miller (Ross Business School)
Funding Agency	
IRB	***HUM#:*** HUM00164105 ***Period of Approval:*** 12/23/2022-12/23/23
Project Team	***Project Lead:*** Karin Schneider
	Budget Analyst: Christine Evanchek
	Production Manager: Barbara Aghababian-Homburg
	Senior Project Advisor: Nicole G Kirgis
	Production Manager 1: Karin Schneider
	Production Manager 2: Donnalee Ann Grey-Farquharson
Proposal #	no data
Description	The overall project is funded by a consortium (currently consisting of both OpenResearch Lab (Open) and NIH. OpenResearch Lab (Open) (formerly Y Combinator Research) and the principal investigators are conducting an evaluation of Every Dollar Counts, a cash assistance gift program being administered by two non-profit organizations: CitySquare, based in Dallas, Texas, and Heartland Alliance, located in Chicago, Illinois (the Community Partners).
	The purpose of this study is to explore how the program affects multiple dimensions of recipients' lives. Key outcomes of interest include health, subjective and material well-being, time use, financial health, labor market participation, social and civic engagement, and effects on children. SRO concluded the Baseline interviews in 2020, and the Midline interviews in July 2022. The EDC Endline project will reach out to all Baseline respondents for completion of a telephone interview, followed by an in-person interview (with cognitive tasks, anthropometric measurements and collection of dried blood spots) for those respondents still in the greater Chicago area or greater Dallas/Ft. Worth area. Data collection will take place between March 2023 and late September 2023. SRO assumes approximately 91% of the 2,990 Baseline respondents are located and willing to be interviewed again (2,720 90-minute telephone interviews). SRO assumes that in-person interviews will be completed with 2,003 respondents still living in the greater Chicago or Dallas/Ft. Worth and Waco area. About 400 respondents are known to currently reside outside of these areas; these respondents will not be asked to complete an in-person interview. The in-person interviews will include collection of consent for administrative data collection, collection of Social Security number, completion of self-administered on-line cognitive assessments, collection of blood pressure, height, weight, and dried blood spots. We assume that 1, 957 respondents will participate in the dried blood spot collection. Following collection of the dried blood spots, SRO interviewers will package and ship the dried blood spot cards to the laboratory chosen by ORL.
	• Our budget assumes up to 2,720 telephone interviews are completed and allows for at least six telephone attempts on all non-resistant cases with working telephone numbers. SRO will track and monitor contact attempts to examine the efficacy of contact windows in the first replicate of the sample.
	• The budget assumes approximately 2,003 cases complete the in-person component and 1,957 consent to the DBS collection.
	• Mileage costs for fieldwork are budgeted at 2,003 trips of no more than 120 miles per round trip.
	• Cash incentives of $15,000 are included in the budget estimate to facilitate in-person payments to reluctant and hard-to-reach participants and individuals who are asked to assist in the location of these participants. All other participant incentive payments are the responsibility of Open.
	• Supplies/kits for DBS are included in the estimate consistent with our most recent project experience. Further discussion with the University of Washington laboratory may result in the refinement of the materials and method for drying the bio specimens and associated costs of project supplies.
	SRO will conduct standard data cleaning and produce a preliminary and final dataset with documentation. Standard data cleaning does not include customization (such as derived variable or index creation, dataset merging, sample weighting, recoding, or coding of other-specify responses). We will ensure that all components of a case are present with a reference variable (SID, OID) to allow for merging and data analysis. Our main documentation is conveyed through data dictionaries and a questionnaire codebook.
	We have not budgeted for coding any open-ended responses.
	Deliverables:
	• SRO will provide daily, automated delivery of questionnaire data, cognitive tasks, and sample management system data for cases with a final disposition and sample management system data for all cases that have been released to interviewers.
	• Sample management data that will be delivered daily to Open will include the following case-level variables:
	o Contact attempts
	? number by type (SMS, phone, email, in-person)
	? date/time of last attempt
	o Appointments
	? date/time of scheduled appointments
	? occurrence of broken / missed appointments
	? how appointment was made (self-scheduler/by interviewer)
	o Current incentive assigned to the sample line
	o SRO will work with Open during pre-production to finalize variables and format.
	• We will work with Open between completion of active data collection and end of the funding period for Endline to reconcile any outstanding discrepancies in the data.
	• SRO will also deliver:
	o Daily data collection progress reports
	o A final summary of field methods at the end of data collection
	o A full survey dataset with all participant contact information at the close of data collection.

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

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

Other Project Team Members	In addition to the above: Ian Ogden (SSS, Tech Coordinator); Anna Fuqua-Smith (SSI); Austin De Spirito (SSA); Jeff Smith (Tech Lead); Marsha Skoman (SurveyTrak); Heuchun Peng and Shaowei Sun (Self-Scheduler); Peter Sparks & Kelly Liesko (Blaise); Stephanie Windisch and Jennie William (Data Management); Ashwin Dey and Darnell Franklin (Webtrak, Weblog, Reports)
Other Project Name	
Sample Mgmt System	SurveyTrak; Project specific system (Self-Scheduler for Telephone)
Data Col Tool	Blaise 4.8; Other (ArcGIS - Survey 123)
Hardware	Laptop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	DRI-CARI
Incentive	Yes, R; Yes, INF
Administration	SRO Group; Other (PI Payment)
Payment Type	Cash, post ($10 or $20 For Dried Blood Spots); Other ($20 Finders Fee)
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)

Report Period	Sep, 2023 (EDC-Endline)	Closing
Risk Level	On Track	
Monthly Updates	We continue to not need the projected hours for project closeout. We have only the final report (almost ready) and some google drive clean up (ably led by Ian Ogden with support from Kelly Chatain).	
Special Issues	None. Project wrapped up successfully. Final data has been delivered.	

Cost as of Oct 11, 2023	*Total Cost to Date (direct + indirect):*		1,196,718.75
	Est Cost at Completion (E$AC):		1,207,554.44
	Total Budget:		3,097,511.00
	Variance (Total Budget minus- E$AC):		1,889,956.56
	Reason for Variance:	Very little in-person effort required. Workscope reduced - no inclusion of biomarkers.	
Projections as of Oct 11, 2023	*Dollars Projected for Month:*		76,027.24
	Actual Dollars Used:		27,731.03
	Variance (Projected minus Actual):		48,296.21
	Reason for Variance:	We continue to not need the projected hours for project closeout.	

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	2865	96	3.0
	Goal at Completion:	2865	96	3.0
	Current Actual:	2865	96	2.74
	Estimate at Complete:	2865	96	2.74
	Variance:			

Other Measures

Project Name	(HART) Health, Aging, and Retirement in Thailand (HART) - SRO consultation (2023) (On Track)		
Project Mode	Primary: Not Available		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 55,460.00	**Indirect Budget:** 16,083.00	**Total Budget:** 71,543.00
Principal Investigator/Clients			
Funding Agency			
IRB	*HUM#:* NA		*Period of Approval:*
Project Team	*Project Lead:* Nicole G Kirgis		
	Budget Analyst: Dean E Stevens		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1: Rebecca Gatward		
	Production Manager 2:		
Proposal #	no data		
Description	SRO to provide consultation and guidance on components of the Health, Aging, and Retirement in Thailand wave 5 data collection. SRO assisted the Center for Aging Society Research in the transition from PAPI to CAPI data collection for HART wave 2 in 2016-18. For wave 3 and 4, HART used QuestionPro for data collection. The study is now interested in SRO's consultation and guidance on returning to Blaise for the questionnaire and SurveyTrak and WebTrak for sample and production management. The budget covers time for the following: - consultation on the preparation of technical systems for wave 5 - including liaising with Statistics Netherlands on licensing and the use of Blaise, - assisting with training on sample design and implementation and sample weighting, including handling attrition and - consult and training on data management, specifically managing the data structure of panel data and preload. Two 'learning by doing' training trips will take place. Trip one: U-M Team to Hart (April2023) involving a SRO data manager and Blaise programmer will travel to Thailand to work with the HART team. Trip two: HART team to U-M to take place between 8 - 29 September 2023 (originally planned for August). This visit will focus on the technical side of field survey management, programming, sampling and weights (including suggestions for sample design enhancements for Wave 5) and data management using HRS and HART as case studies.		
SRO Project Period	01/2024 - 10/2023		
Data Col Period			
Security Plan	NA		

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

Other Project Team Members	Karl Dinkelmann Jennie Williams Marsha Skoman David Bolt Raphael Nishimura Sarah Broumand
Other Project Name	HART wave 5
Sample Mgmt System	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Sep, 2023 (HART)	Implementing
Risk Level	On Track	
Monthly Updates	September update: The HART team workshop ran from 9/11 - 9/29.	

During the first week we spent two days discussing data collection software options - they received a basic overview of Blaise 5 and a demo of the Qualtrics questionnaire programmed for The Community College Study . We created a draft list of options for Wave 5 and 6 and provided ball park costs for these during week three. Jennie Williams and Laura Yoder (along with Julia Roach and Tom Blackburn) also provided a detailed review of data manager tasks. Further HRS research team members joined to share information about data release, data user management and the HRS website along with questionnaire development. SRO staff were involved in sessions on Production Management, Interviewer QC and Respondent Locating. The HART team also completed a full GIT training. The focus of the final week was Sampling and weighting, further discussions on software options and a session with the Asia representative for Qualtrics. We are currently awaiting reaction from the HART PI on the ballpark costs provided and any further thoughts they have on what direction want to take (software) for Wave 5 and 6.

Special Issues			
Cost as of Oct 17, 2023	*Total Cost to Date (direct + indirect):*		55,320.94
	Est Cost at Completion (E$AC):		57,180.33
	Total Budget:		71,543.00
	Variance (Total Budget minus- E$AC):		14,362.67
	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. During their visit, most meals were paid for by the HART team and accommodation was provided (on Campus) at no costs to SRO.	
Projections as of Oct 17, 2023	*Dollars Projected for Month:*		34,658.31
	Actual Dollars Used:		24,633.40
	Variance (Projected minus Actual):		10,024.91
	Reason for Variance:	Salary costs in September were slightly lower than projected - hours had been projected for those involved in the visit to prepare and give their presentations - not all hours were used (212/293 hrs). There are still around $725 of hosting costs to be charged to the account.	

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 (On Track)**		
Project Mode	Primary: Face to Face Secondary: Telephone		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 3,300,000.00	**Indirect Budget:** 1,188,000.00	**Total Budget:** 4,488,000.00
Principal	Kenneth Langa (SRC)		
Investigator/Clients	David Weir (SRC)		
Funding Agency			
IRB	**HUM#:** HUM00099822		**Period of Approval:**
Project Team	**Project Lead:** Maureen Joan O'Brien		
	Budget Analyst: Richard Warren Krause		
	Production Manager: Margaret Lavanger		
	Senior Project Advisor: Evanthia Leissou		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	This project will involve the completion of a face-to-face CAPI interview, designed to provide a dementia assessment of HRS respondents. A sample of 5000 respondents (one per household) who are 65 years of age or older will be selected for this effort. The questionnaire is a series of 15 cognitive tests and will be administered to respondents after the HRS 2022 interview has been completed. The sample will not be clustered geographically; it will be selected randomly. It is expected that the field team will carry out well-planned regional trips in order to complete the 3,530 in-person interviews. An informant interview will also be completed for each of the respondents interviewed. The respondent questionnaire length is expected to be 60 minutes. The informant questionnaire is expected to be 20 minutes and can be administered in-person after the R interview, or by telephone/mail if FTF is not available.		
SRO Project Period	01/2022 - 12/2023		
Data Col Period	07/2022 - 11/2023		
Security Plan	NA		

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

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

Report Period	Sep, 2023 (HCAP 2022)	Implementing
Risk Level	On Track	
Monthly Updates	HCAP production has been underway for 65 weeks. There are 6 weeks left in production. As of this morning, 5,385 interviews have been completed, including 2,862 R and 2,523 Inf. There are currently 128 appts (91 R, 37 Inf). The overall HPI is 4.85. 399 Spanish interviews have been completed (234 R, 165 Inf). It was discovered last week that an Iwer falsified 23 interviews (2 R, 21 Inf) of 164 completed iws (117R & 47 Inf). All but 6 of her completed interviews have been reviewed in one of the 3 following ways: 1. Recordings were reviewed by project and production management staff 2. Verifications 3. Evaluations 6 remaining interviews will be verified. The PIs have been notified and we will provide a report of the extent of the falsifications once the reviews/verifications are completed. One of the R falsifications must be submitted as an ORIO because the Iwer skipped two of the tasks and entered false data. We will attempt to redo all falsified interviews. The Inf iws can be done by phone, but the 2 R iws must be completed in person.	

We are still approved for up to a 190k direct cost overrun and at this point we are at 135k direct over. We will likely not exceed this 135k overrun. We expect to exceed the originally agreed upon 64% overall RR with 5,398 completed Iws (2,901R & 4,297Inf). The new goals are an overall final RR of 67% (70% R & 65% Inf) with a total of 5,631 completed iws (2,988 R & 2,653 Inf). We expect to meet these goals keeping Iwers hours up through the end of production.

We have been closely monitoring subgroup RRs, including Proxy, Black, and Hispanic. The proxy RR goal is 25% and we are currently at 23%. Outlier trips are underway.

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 Oct 17, 2023	**Total Cost to Date (direct + indirect):** 4,206,422.08
	Est Cost at Completion (E$AC): 4,671,916.36
	Total Budget: 4,488,000.00
	Variance (Total Budget minus- E$AC): -183,916.36
	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 Oct 17, 2023	**Dollars Projected for Month:** 233,689.61
	Actual Dollars Used: 210,930.50
	Variance (Projected minus Actual): 22,759.11
	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:	5390		5
Goal at Completion:	5641	67% (overall)	4.8
Current Actual:	5385	65%	5.75
Estimate at Complete:	5641	69%	4.8
Variance:			

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

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

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

Report Period	Sep, 2023 (Health and Well Being in SE ~~MI~~	Implementing
Risk Level	Attention!	
Monthly Updates	The D-AMP project has collected only 35 main interviews and 26 informant interviews in just over 4 months of data collection. D-AMP was budgeted as a 10-month data collection and should have completed about 300 main interviews in 3 months. Hours per interview and hours per screener are far higher than budgeted. The field team has finalized 1218 out of 3205 screening lines released to the field. (Panel cases have not yet been released).	
	The project is getting close to the required number of interviewer hours, however the hours worked are unproductive. Eligibility is lower than budgeted (currently around 10%, budgeted at around 17%). Respondents are extremely resistant to participating. Some respondents can be coaxed to complete the screener, but refuse to make appointments for interviews. A common objection is the length of the interview, which runs around 176 minutes (compared to 140 minutes budgeted).	
	We presented the financial and production status to the PIs in September, and were (and continue to be) very clear	

that the project is in extreme financial trouble, and they will not achieve the budgeted number of interviews. We have been working collaboratively with the PIs to attempt to develop protocol modifications to improve field data collection (however we have been clear that this will not recover lost time or money).

--The PIs approved an increase in the token of appreciation to $100 (IRB approval just received, will be rolled out October 25), as well as a recruitment/training of experienced traveling interviewers. Experienced interviewers will be trained in late November/early December.

--The PIs also approved creation of study brochures that can be used with screened-in households. English versions of the study brochures were finalized during the week of October 16 and are awaiting IRB approval. LCD is handing translations.

--The PIs approved the implementation of call limits on screening to help manage the high screening hours.

--We requested that the PIs increase community outreach to help counter extreme resistance. They are working on this as well, and have contacted mosques, churches, community groups, and are increasing advertisements.

--SRO proposed alternative sampling strategies using MSG data. DMSS is evaluating the best options for new sampling plans for D-AMP - these will be presented to the PIs in mid-October. We hope the new sample options will help to increase eligibility. The PIs have been receptive to these ideas.

--Another intervention being attempted is having a LCD team member attempt refusal conversion on screened-in cases that have been very resistant to participation. The LCD team member was training on Oct 10 and 13 in the use of SurveyTrak and will begin outreach.

Special Issues	We do not yet know how the situation in the Middle East will impact interviewing on D-AMP. We are staying in touch with interviewers and monitoring field work.

Prior to the Mid-East conflict, the interviewing team was encountering extreme respondent resistance to the project that is impacting interviewer morale.   HPI/HPS are far higher than budgeted and production is extremely low. The interview length is roughly 40 minutes longer than budgeted, and is related to the age of the respondents. About 71% of the interviews require Arabic, compared to 35% estimated.

We are projecting that all of the project budget will be used for data collection, especially given the excessively high HPI. We are not projecting an overrun -- the assumption is that the work scope will be reduced in order to avoid overruns. We have asked the PIs for input on how much panel sample to release, given the very low prospects for new sample cases on D-AMP. This was very clearly stated as the PIs must decide whether they want to prioritize new sample cases over panel sample cases, given the fixed budget available, and the fact that we will not be able to meet the study's goals for number of cases.

Cost as of Oct 17, 2023	**Total Cost to Date (direct + indirect):**	2,103,735.00
	Est Cost at Completion (E$AC):	3,759,017.05
	Total Budget:	3,758,127.00
	Variance (Total Budget minus- E$AC):	-890.05
	Reason for Variance:	We expect that the full project budget will be used, given the very high HPI on the project.
Projections as of Oct 17, 2023	**Dollars Projected for Month:**	320,466.94
	Actual Dollars Used:	262,167.47
	Variance (Projected minus Actual):	58,299.47
	Reason for Variance:	Respondent cooperation is extremely low, resulting in lower than anticipated respondent payments. Travel per interview is also lower than budgeted. We are modifying projections to accommodate the low level of production and travel.

Measures		Units at Complete	RR	HPI
	Current Goal:	930 main, 930 inf	60% scr, 70% main	10.38 w/screening
	Goal at Completion:			
	Current Actual:	35 main, 26 inf	34% scr, 29% main	67 HPI w/screening
	Estimate at Complete:			
	Variance:			
Other Measures	Only 1/2 of the sample has been released. RR shown above are for the released sample.			

Budgeted at 140 minutes, the D-AMP average interview length is 176-180 minutes.

Saliva participation rate is roughly 76% compared to 80% budgeted.

Project Name	(HRS 2022 Panel & Baselines) Health and Retirement Study 2022 Main Interviews (Attention!)		
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	David Weir (ISR-SRC)		
Investigator/Clients			
Funding Agency			
IRB	*HUM#:* HUM000611128		*Period of Approval:* 6/7/2023-6/6/2024
Project Team	*Project Lead:* Evanthia Leissou		
	Budget Analyst: Richard Warren Krause		
	Production Manager: Andrea Sims		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Jennifer C Arrieta		
	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 people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.		
SRO Project Period	01/2021 - 12/2023		
Data Col Period	03/2022 - 08/2023		
Security Plan	NA		

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

Other Project Team Members	Derek Dubuque (Production Manager), 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), Andria Goedert (Project Assistant), 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

Coding Lead: Carolyn Vieira-Martinez |
Other Project Name	HRS 2022 Main Iws
Sample Mgmt System	SurveyTrak; MSMS
Data Col Tool	Blaise 5; SAQ
Hardware	Laptop; [UM cell] Phone; Paper and Pencil
DE Software	Other (Blaise 5 Coding Application); External vendor (DataForce)
QC Recording Tool	Camtasia
Incentive	Yes, R; Yes, INF
Administration	NA
Payment Type	Check, prepaid ($80 (Panel)); Check, post ($50 (WBD)); Cash, post ($20 (SAQ), $100 (Baselines))
Payment Method	Check through STrak RPay System; Check through other system (Rpay system set up for MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (Rpay system set up for MSMS); Imprest Cash Fund from ISR Business Office (Rpay system set up for MSMS)

Report Period	Sep, 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, and preparing for the October training.	

2. Panel interviewing ended Saturday, 9/2/23 with a final response rate of 68%.
3. After Panel ended, interviewers focused on screening rather than baseline interviews. Field managers have been working closely with interviewers to prioritize baselines as well as strategies for working with baseline Rs.
4. Baseline interviewing will continue through at least the summer of 2024 due to the slow progress. Goals will be updated after the October trainees start production.
4. Propensity model of baseline completion at the call record level was run (as of 9/19/23)
-1,1986 cases were flagged as priority. Newly generated baselines from screening will be flagged on a weekly basis.
-117 coded final
-919 (includes partner lines)and 125 EGenX 2019 cases were put on a pause and removed from interviewers laptops pending endgame actions. Endgame plan: Mail letter (submitted to IRB) with post-paid $100 incentive to complete the interview, a follow-up visit/call from an interviewer

*The "measures" table reflects both Panel and Baseline combined as of 10/18

Special Issues	- Did not meet the Panel response rate goal of 74% even with the additional five months of field time and responsive design strategies due to interviewer count and balancing effort with new cohort screening/baseline iws. - Multiple Blaise issues that have impacted STrak and MSMS throughout data collection. - Competing project team demands with HRS 2022 in data collection at the same time as 2023 mail surveys and HRS 2024 preproduction. -High field staff attrition rate. Burden on staff with additional recruitment and training efforts while managing production. - Concerns about slow progress in completing baseline interviews now that panel is done and in meeting baseline interview goals for early data release (interviews completed through 12/31/23).	
Cost as of Oct 17, 2023	**Total Cost to Date (direct + indirect):**	18,192,999.11
	Est Cost at Completion (E$AC):	18,018,086.56
	Total Budget:	19,016,630.00
	Variance (Total Budget minus- E$AC):	998,543.44
	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 interviewer hours coming in under projections and a lower overall response rate. Summary for the wave: CRS is projecting the contingent fringe benefits with the newly approved 10.4% rate to accommodate ACA costs, the $400 signing bonus for field staff, Field interviewer and SurveyTech base rate increase, an extra day added to February production training, the increase in per mile reimbursement for travel. CRS is now using the actual Iwer rates for projecting Iwer costs and travel projections were removed from the recruitment task. The Casic recharge rate and Field Ops rate increases, increased mileage costs for remaining interviews, the Field Iwer and SurveyTech rate increases have been updated in CRS, the increase in recharges to the Iwer-Trainee hours as well as the reduction in the CAPI rate. The additional interviewer hours needed to reach panel interview goals have been applied to CRS. Accounts for the interviewer base rate increase in 2023.
Projections as of Oct 17, 2023	**Dollars Projected for Month:**	620,038.95
	Actual Dollars Used:	572,392.42
	Variance (Projected minus Actual):	47,646.53
	Reason for Variance:	The primary reason for variance was due to field interviewer coming in under projections.

Measures		Units at Complete	RR	HPI
	Current Goal:	16,638	56%	10.8
	Goal at Completion:	23,468	46%	7.9
	Current Actual:	16,587	56%	10.8
	Estimate at Complete:	22,186	44%	9.7
	Variance:	1,282	2%	1.8

Other Measures	Panel: Expected RR: 68% (original goal 74%), Final RR: 68% (Panel end date 9/2/23) 2022 Baselines generated from screener: Goal RR: 26% (6,450 iws needed), Current RR: 21.6% (1,664 completed) from baselines spawned from screener as of 10/17/23. 2019 EGenX baselines: Goal RR: 70%, Current RR: 72.4%

Project Name	(HRS 2024) Health and Retirement Study 2024 (Some Concerns)		
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		
Pre Production Start: 05/15/2023		**Pretest Start:** 01/29/2024
Pretest End: 02/11/2024		**Recruitment Start:**
Staffing Complete:		**GIT Start:** 04/05/2024
SS Train Start: 04/07/2024		**SS Train End:** 04/12/2024
DC Start: 04/15/2024		**DC End:** 05/31/2025

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, Kelly Lieske
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, $20 SSA); 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	Sep, 2023 (HRS 2024)	Planning
Risk Level	Some Concerns	
Monthly Updates	HRS 2024 preproduction activities continued with focus cost projections, technical specifications, technical development, testing, and finalizing pretest training dates and location. *Milestone dates are tentative.	

| Special Issues | Resource (Regular and Field Staff) concerns for HRS 2024 preproduction and production while HRS 2022 data collection and HRS mail surveys are in production. |
| | Session database issues needing to be addressed/resolved by CBS for HRS 2024. 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. |

Cost as of Oct 17, 2023	Total Cost to Date (direct + indirect):		105,168.69
	Est Cost at Completion (E$AC):		821,344.01
	Total Budget:		821,421.00
	Variance (Total Budget minus- E$AC):		76.99
	Reason for Variance:	Minimal variance. The HRS 2024 budget is for preproduction efforts through March 2024. Will update the total budget once the 6 year renewal proposal is reviewed/approved/awarded.	

Projections as of Oct 17, 2023	Dollars Projected for Month:		63,420.96
	Actual Dollars Used:		36,053.98
	Variance (Projected minus Actual):		27,366.98
	Reason for Variance:	Variance due to fewer staff hours than originally projected primarily due to HRS 2022 resource needs. Future projections have been adjusted.	

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

Other Measures

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

Report Period	Sep, 2023 (HRS HOC)	Planning
Risk Level	Some Concerns	
Monthly Updates	During the month of September, - Jeannie participated in and scheduled meetings with the PI and budget analyst. - Team resumed bi-weekly meetings. - HRS Staff is still working on ways to improve classification performance. Currently around 50%. Exploring ways to improve text cleaning but the acceptable rate has not been agreed upon yet. -Michael Nolte and Qize Chen continue to run various iterations containing different methods of file cleaning. The estimate of how many instances of occ/ind SRO will need to recode may be impacted by the NIOCCS match rate. -Note: Michael Nolte is retired from ISR. While he remains committed to seeing this project through and is heavily relied on for his expertise, he only works part time.	
Special Issues	- Coding work continues to be pushed back. Due to the difficulty in getting acceptable NIOCCS match, it may be December before we are ready to take to coding. - 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. -Preliminary NIOCCS results are disappointing which may result in more SRO coding than originally anticipated. Will assess impact to budget and timeline once have final counts from HRS staff.	

Cost as of Oct 17, 2023	**Total Cost to Date (direct + indirect):**		21,626.40
	Est Cost at Completion (E$AC):		86,341.54
	Total Budget:		92,157.06
	Variance (Total Budget minus- E$AC):		5,815.52
	Reason for Variance:	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.	
Projections as of Oct 17, 2023	**Dollars Projected for Month:**		9,110.44
	Actual Dollars Used:		708.00
	Variance (Projected minus Actual):		8,402.44
	Reason for Variance:	Not as much project management that was projected has been needed at this point in the planning phase. Due to initial project delay and further delay with HRS (ISR) staff, coding hours have not been utilized. Coding now estimated to begin in December 2023 so unused hours for project management, system set up, and coding will be pushed forward.	

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

Other Measures

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

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

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

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Report Period	Sep, 2023 (HRS2022-Screening)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Batch 5 sample have been through the web portion of the protocol. We are sending it out on an as needed basis.	

We have released 4,727 cases to the endgame protocol. The goal is to have these cases through the endgame protocol and finalized by early November.

Screening as slowed a bit in recent weeks as the focus has shifted to baseline production to try and increase that. We are close to production goals on screening but more work is needed on baselines as they are well below goal. Goals need to be updated after we understand how production is progressing. A comprehensive review of sample/staff/areas is needed to understand what effort is best in a particular area given team size, and sample availability. We know there are areas with a surplus of baselines to work, areas largely worked that need more sample, and unstaffed areas. Field work is going to require micromanaging from here on. 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.

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) somewhere between ~100-~500 segments in the reserve sample. More finalization of cases (screening and baseline) is needed to understand how many additional segments are needed. We hope to be able to at least select the lower end of that soon to begin address sorting in the fall and can supplement with additional segments at a later date.

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		
Cost as of Oct 10, 2023	*Total Cost to Date (direct + indirect):*	15,124,706.88
	Est Cost at Completion (E$AC):	27,714,234.14
	Total Budget:	28,919,242.00
	Variance (Total Budget minus- E$AC):	1,205,007.86
	Reason for Variance:	Projections are in the process of being updated.
Projections as of Oct 10, 2023	*Dollars Projected for Month:*	1,235,137.28
	Actual Dollars Used:	778,540.67
	Variance (Projected minus Actual):	456,596.61
	Reason for Variance:	The largest contributors to the variance were due to unused interviewer hours (due to focus on finishing panel) and spending less in unused respondent payments. These costs were pushed forward.

Measures		Units at Complete	RR	HPI
	Current Goal:	3,600/1,500 HHs	73%	3.0
	Goal at Completion:			
	Current Actual:	2,520/2,588	45.8%	2.95
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	**(IHDS3) India Human Development Survey Wave 3 (On Track)**		
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 480,953.61	**Indirect Budget:** 213,189.92	**Total Budget:** 694,143.53
Principal	Sonalde Desai (University of Maryland)		
Investigator/Clients	Stephanie Chardoul (University of Michigan)		
	Santanu Pramanik (National Council of Applied Economic Research)		
Funding Agency	National Institutes of Health, Department of Health and Human Services		
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Sarah Elisa Broumand		
	Budget Analyst: Ryan Neice		
	Production Manager:		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Sarah Elisa Broumand		
	Production Manager 2: Sarah Elisa Broumand		
Proposal #	no data		
Description	The India Human Development Survey (IHDS) is a nationally representative, multi-topic, longitudinal survey of 41,554 households in 1503 villages and 971 urban neighborhoods across India. The first round of interviews were completed in 2004-5; data are publicly available through ICPSR. A second round of IHDS reinterviewed most of these households in 2011-12 (N=42,152). SRC joins IHDS Wave 3 to automate data collection, the scope of work includes methodological design, sample design, questionnaire design, technical instrument design, supervisor/interviewer training, production monitoring, quality control, data dissemination, and 2-3 weekly conference calls for capacity building.		
SRO Project Period	01/2019 - 03/2024		
Data Col Period	05/2022 - 10/2023		
Security Plan	NA		

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

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

Report Period	Sep, 2023 (IHDS3)	Implementing

Risk Level	On Track
Monthly Updates	This month has been mostly used to set up merges and reporting for the 2 new agencies that launched recently. Work has started to deal with old case recovery in preparation of closeout for agencies(Community and Household Projects) A01,2,3,5,6 and 7.

Additional Support has been approved by NCAER and added to projections. Client was looking at securing an additional 5k to cover any incidentals related to project closeout. Instead we did not carry forward certain number of hours due to resource constraint and to provide a buffer for incidentals for project closeout. |
| **Special Issues** | Wave 3 funding balance ended at -$18,833.61 direct and indirect costs (-$12,072.53 Direct)) |

Cost as of Oct 17, 2023	*Total Cost to Date (direct + indirect):*		602,978.85
	Est Cost at Completion (E$AC):		690,724.10
	Total Budget:		694,143.53
	Variance (Total Budget minus- E$AC):		3,419.43
	Reason for Variance:	TOTAL Budget is $86,224.00. Not carrying forward certain amount of hours due additional funds that may be needed during closeout.	

Projections as of Oct 17, 2023	*Dollars Projected for Month:*		17,627.43
	Actual Dollars Used:		13,382.05
	Variance (Projected minus Actual):		4,245.38
	Reason for Variance:	Due to staffing constraints some of the allocated hours could not be used, they will be re-allocated moving forward.	

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

Other Measures

Project Name	**(LHMS 2023 Fall) Life History Mail Study Fall 2023 (On Track)**		
Project Mode	Primary: Mail Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 371,587.00	**Indirect Budget:** 133,772.00	**Total Budget:** 505,359.00
Principal	David Weir (SRC)		
Investigator/Clients	Jaqui Smith (SRC)		
Funding Agency	NIH		
IRB	**HUM#:** HUM00106904		**Period of Approval:** 9/29/2023-9/28/2024
Project Team	**Project Lead:** Gary Hein		
	Budget Analyst: Cindy Tsao		
	Production Manager: Ruth B Philippou		
	Senior Project Advisor: Evanthia Leissou		
	Production Manager 1:		
	Production Manager 2: Ruth B Philippou		
Proposal #	no data		
Description	The HRS Life History Mail Survey (LHMS) is part of the Health and Retirement Study. The goal of LHMS is to collect retrospective life histories of HRS participants to address multidisciplinary need for information about events, residential location, and education over the entire life course. Information like this allows researchers to understand how individuals' pasts shape their health and economic situations today. A paper questionnaire will be mailed to a sample of approximately 4,601 HRS Respondents. From this sample, approximately 2,485 completed surveys are expected (54% response rate). For the reminder protocol, 272 respondents have been designated to receive a reminder by postcard. The remaining 4,329 respondents will receive reminders by phone to complete the questionnaire. When a respondent is reached by phone, SRO will attempt to complete the 60-minute interview by telephone. Thank you postcards will be mailed to respondents who return a completed questionnaire.		
SRO Project Period	09/2023 - 04/2024		
Data Col Period	10/2023 - 02/2024		
Security Plan	NA		

Milestones			
Pre Production Start: 09/01/2023		**Pretest Start:**	
Pretest End:		**Recruitment Start:**	
Staffing Complete:		**GIT Start:**	
SS Train Start:		**SS Train End:**	
DC Start: 10/05/2023		**DC End:** 02/01/2024	

Other Project Team Members	Gary Hein: Project Lead Cindy Tsao: Budget Analyst Ruth Philippou: Production Manager Vanessa Clarke: Project Assistant Carolyn Viera Martinez: Coding Lead
Other Project Name	LHMS Fall
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	Sep, 2023 (LHMS 2023 Fall)	Implementing
Risk Level	On Track	
Monthly Updates	Fall LHMS activities and notable events: 1- Sample file created and reviewed 2- SAQ proofs approved 3- Sample Addresses are cleaned and separated by type. 4- IRB amendment and continuing review submitted to IRB	

5- Checks mailed to DataForce
6- Letter Proofs received from DataForce
7- Initial set of checks damaged and returned to SRO. New checks printed and mailed to Dataforce.
8- Sample review before mailing, 20 further cases removed
9- IRB amendment and continuing review approved by IRB
10- Photos of mailing packets approved.
11- Weblog and Webtrak instruments programmed and tested

Special Issues	A UPS Shipping error damaged checks that needed to be reprinted. Once the first batch of checks are voided, an estimated $96,000.00 will be credited to the project in October, reducing the total cost to date.

Cost as of Oct 12, 2023	*Total Cost to Date (direct + indirect):*	266,884.06
	Est Cost at Completion (E$AC):	409,922.09
	Total Budget:	505,359.00
	Variance (Total Budget minus- E$AC):	95,436.91
	Reason for Variance:	Staffing for reminder calling will not meet original projections. If calling does not stay on pace, additional staff or calling time may be added, which may reduce the variance.

Projections as of Oct 12, 2023	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	266,599.59
	Variance (Projected minus Actual):	266,599.59
	Reason for Variance:	Budget not available before Fall projections were locked

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	2,485	54%	N/A
	Goal at Completion:	2,485	54%	N/A
	Current Actual:	0	0	N/A
	Estimate at Complete:	2,485	54%	N/A
	Variance:			

Other Measures

Project Name	**(LHMS 2023 Spring) Life History Mail Study Spring 2023 (On Track)**		
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	The HRS Life History Mail Survey (LHMS) is part of the Health and Retirement Study. The goal of LHMS is to collect retrospective life histories of HRS participants to address multidisciplinary need for information about events, residential location, and education over the entire life course. Information like this allows researchers to understand how individuals' pasts shape their health and economic situations today. A paper questionnaire will be mailed to a sample of approximately 2,288 HRS Respondents. From this sample, approximately 1,242 completed surveys are expected (54% response rate). For the reminder protocol, 495 respondents have been designated to receive a reminder by postcard. The remaining 1,793 respondents will receive reminders by phone to complete the questionnaire. When a respondent is reached by phone, SRO will attempt to complete the 60-minute interview by telephone. Thank you postcards will be mailed to respondents who return a completed questionnaire.		
SRO Project Period	04/2023 - 12/2023		
Data Col Period	06/2023 - 09/2023		
Security Plan	NA		

Milestones	*Pre Production Start:* 04/01/2023		*Pretest Start:*	
	Pretest End:		*Recruitment Start:*	
	Staffing Complete:		*GIT Start:*	
	SS Train Start: 07/11/2023		*SS Train End:* 07/11/2023	
	DC Start: 06/20/2023		*DC End:* 09/26/2023	

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	Sep, 2023 (LHMS 2023 Spring)	Implementing
Risk Level	On Track	
Monthly Updates	September Activities and Notable Events: 1 -Logging of returned SAQs 2- Reminder calling through 9/26 3- Additional SAQs mailed to respondents who request them during reminder calling 4- Weekly progress reports created and delivered to project stakeholders 5- Additional reminder calling shift added in October to respond to any respondents contacting RCT after the end of	

reminder calling

Special Issues	None	
Cost as of Oct 17, 2023	*Total Cost to Date (direct + indirect):*	224,910.25
	Est Cost at Completion (E$AC):	268,326.51
	Total Budget:	457,922.00
	Variance (Total Budget minus- E$AC):	189,595.49
	Reason for Variance:	Actual sample of 1,950 is lower than budgeted sample of 2,288, resulting in generally lower costs across all resources. In addition, the budgeted response rate was 54% but actual response rate is much lower as the respondents are non-responders from past waves of LHMS.
Projections as of Oct 17, 2023	*Dollars Projected for Month:*	56,963.46
	Actual Dollars Used:	28,561.33
	Variance (Projected minus Actual):	28,402.13
	Reason for Variance:	Over 10k in dataforce bills did not hit cost reports in September, Survey Tech reminder calling time over projected, over 10k in projected indirect costs unrealized.

Measures		Units at Complete	RR	HPI
	Current Goal:	1053	54%	N/A
	Goal at Completion:	1053	54%	N/A
	Current Actual:	314	15%	N/A
	Estimate at Complete:	330	18%	N/A
	Variance:	723	36%	N/A
Other Measures	N/A			

Project Name	**(MI CReSS (Year 3 & 4)) Michigan COVID-19 Recovery Surveillance Cohort Study (On Track)**
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects
Budget	**Direct Budget**: 667,755.00 **Indirect Budget:** 173,620.00 **Total Budget:** 841,375.00
Principal	
Investigator/Clients	
Funding Agency	
IRB	***HUM#:*** HUM00181068 ***Period of Approval:*** Exempt
Project Team	***Project Lead:*** Timothy Prand
	Budget Analyst: William Lokers
	Production Manager: Lisa J Carn
	Senior Project Advisor: Nicole G Kirgis
	Production Manager 1: Narine Verdiyan
	Production Manager 2:
Proposal #	no data
Description	MI CReSS is a partnership between the University of Michigan School of Public Health (SPH) and the Michigan Department of Health and Human Services. It is a public health surveillance study to learn about Michiganders' experiences with COVID-19 using a representative sample of confirmed cases within the state. Using survey data, they plan to document sociodemographic inequities in COVID-19 testing, treatment, and recovery.
	SRO's involvement includes the administration of a Follow-up survey for respondents that completed a Baseline survey with the SPH team. Based on the sample information provided, we will be re-contacting approximately 3,995 respondents who have already completed (or are estimated) to complete the Baseline survey to administer the Follow-up survey.
	The Follow-up survey is estimated to be 45 minutes in length, and Respondents will be encouraged to complete the survey by web. However, SRO Interviewers will contact non-responders and conduct the interview over the telephone if the Respondents do not want to complete the survey on the web.
SRO Project Period	08/2021 - 09/2023
Data Col Period	01/2022 - 07/2023
Security Plan	NA

Milestones			
Pre Production Start:		***Pretest Start:***	
Pretest End:		***Recruitment Start:***	09/16/2021
Staffing Complete:		***GIT Start:***	
SS Train Start:	11/29/2021	***SS Train End:***	12/02/2021
DC Start:	01/26/2022	***DC End:***	11/14/2023

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

Report Period	Sep, 2023 (MI CReSS (Year 3 & 4))	Implementing
Risk Level	On Track	
Monthly Updates	Cohort 1 - In field & have met 80% target completion.	

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

Cohort 2 launched - Sept 14, 2023
 - Minor issues resulting in NO data loss - Corrected Logic issue
 - Discrepancy in Letter T form used from IRB approved form - Corrected
 - Updated Translations for Arabic & Spanish - Waiting approval
 - Submitted updates to Intro & Voicemail Scripts - Waiting approval
 - Initial timing concern with MoCA section - Iwer team taking longer at end of survey. Expect timing to improve with experience.
 - Releases 1 & 2 in field

Special Issues

Cost as of Sep 20, 2023	*Total Cost to Date (direct + indirect):*		649,836.08
	Est Cost at Completion (E$AC):		649,836.08
	Total Budget:		841,375.00
	Variance (Total Budget minus- E$AC):		191,539.00
	Reason for Variance:	New funding was added. We are approved to extend the budget past 9/30.	
Projections as of Sep 20, 2023	*Dollars Projected for Month:*		72,969.00
	Actual Dollars Used:		76,263.84
	Variance (Projected minus Actual):		-3,294.00
	Reason for Variance:	Additional training hours were applied to September.	

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	5,142 (Rel 1-16)	80% (60%-Web/40%Tel)	2.25
	Goal at Completion:	4113	80% (60%-Web/40%Tel)	
	Current Actual:	4112	80% (71%-Web/29% Tel	5.01
	Estimate at Complete:			
	Variance:	1	0	

Other Measures

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

Report Period	Sep, 2023 (MTF Base Year 2022_27)	Planning
Risk Level	On Track	
Monthly Updates	September 2023	
	Since last month,..	

- actively working on updating training materials and agendas
- SurveyTrak specs. provided to programmer. Hoping to start testing in October.
- work continues on tasks to transition MTF (base year and panel) to Qualtrics. The MTF research team have programmed and tested the base year survey in Qualtrics. Hueichun and Shaowei are working on required updates to the portal and WebSMS. Hueichun has also been providing support to the MTF team with some more complex functionality required in the questionnaire (panel). Our plans for auto downloading data from Qualtrics relies on the continued use of SFTP - we are awaiting further news from CMT about the use of SFTPs.

Special Issues

Cost as of Oct 17, 2023		
Total Cost to Date (direct + indirect):		1,692,467.71
Est Cost at Completion (E$AC):		6,901,886.09
Total Budget:		9,778,060.00
Variance (Total Budget minus- E$AC):		2,876,173.91
Reason for Variance:		Projections for Funding period 2022 – 2027

Current projections result in an under spend for the five year grant period. The projected costs are based on completion of 325 schools in years 2024 – 2027 (we were projecting costs for 400 schools) and all in-person. Illume charges have been removed from projections from 2024 onwards. A portion of the hours for work involved in transitioning MTF surveys to Qualtrics are being charged to the Illume recharge account.

Primary reason for the under spend and plans for SRO funding:
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 used for this budget (n=390).

In response, MTF (SRC) have reduced our funding for the first two years. We have received (from MTF) $1,843,080 (Y1) and $1,143,890 (Y2) a total reduction of $815,581. Going forward, the current plan is to fund Year 3 and 4 based on the budgeted amount - if there is significant underspending MTF will reduce SRO's Year 5 award. SRO Finance group feels that we should continue to report/monitor using the original budgeted amount because this is not an official reduction in budget. We are keeping the client (via Nick Prieur) informed of actual and projected spend through a monthly cost report.

Projections as of Oct 17, 2023		
Dollars Projected for Month:		37,036.18
Actual Dollars Used:		26,148.07
Variance (Projected minus Actual):		10,888.11
Reason for Variance:		Majority of the underspend was due to lower salary costs that projected. My hours were less than half projected due to the HART visit in September (I had not adjusted them).

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

Other Measures

Project Name	(MTF Panel　2022-27) Monitoring the Future Panel 2022-2027 (On Track)		
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	Sep, 2023 (MTF Panel　2022-27)	Implementing
Risk Level	On Track	
Monthly Updates	1. Management - continued discussing with the study team on implementing Qualtrics surve 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. Web Data Collection - As of 09/30/2023 -Total Released Sample = 18727 -Total Completes = 9079 - RR = 48.48% At this point in production 2023 the RR is already higher than it was at the end of October 2022 last wave. Study staff is extremely	

happy with the RR especially since RR had dropped to as low as 30% in 2019 and has been rising consistently since.

4. Winter Location
– Production took place from January 18 through February 22. 67% of cases were resolved, with either the respondent located or with all leads definitively exhausted.

5. NR Production/Calling to support web data collection began in May 18 2023 and ended on Aug 16, 2023
- 4,684 respondents (39%) were located during calling, and of those, 3,586 completed the survey.4. Data Delivery: SRO team continued to work with the study team on data delivery process.

6. RLM: resolved pending issues

Special Issues		
Cost as of Sep 30, 2023	*Total Cost to Date (direct + indirect):*	1,171,066.01
	Est Cost at Completion (E$AC):	3,893,859.02
	Total Budget:	3,895,217.00
	Variance (Total Budget minus- E$AC):	1,357.98
	Reason for Variance:	The total project amount includes MTF Web Illume as well as Non-Response Calling and Winter Location project. The underrun amount is MTF Panel 2022-2027 that was the combination of MTF Panel 2017-2022 and MTF Web Illume. Increased recharge rates are reflected. With 4 years of data collection remaining and possible unforeseen issues with transition to a new survey platform as well as potential increases in scope and costs, the underrun will likely be erased by 2027.
Projections as of Sep 30, 2023	*Dollars Projected for Month:*	39,963.35
	Actual Dollars Used:	27,147.31
	Variance (Projected minus Actual):	12,816.04
	Reason for Variance:	The total project amount includes MTF Web Illume as well as Non-Response Calling and Winter Location project. The overrun amount is MTF Panel 2022-2027 that was the combination of MTF Panel 2017-2022 and MTF Web Illume. Project team will revisit and streamline projections for future months. Increased recharge rates are reflected.

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

Other Measures

Project Name	(PR-PSID) Puerto Rico Panel Study of Income Dynamics (Some Concerns)		
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:* Camila Kendall		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Camila Kendall		
	Production Manager 2:		
Proposal #	no data		
Description	SRO will work with the PIs and a local survey firm in Puerto Rico, Estudios Técnicos (ETI), to develop a sample frame, sample design, questionnaire and data collection protocols for both pilot data collection (in 2022) and baseline data collection (in 2023). DMSS will provide assistance with sample design and implementation, responsive design, panel maintenance issues, and creation of sample weights. SRO will update the PSID-21 Spanish instrument for use specifically in PR. SRO will assist with the preparation of training materials for Listing training, Pretest and Main Data collection and will travel to PR to be on-site for these trainings. SRO will define reports for production and quality control monitoring that will be programmed through the SurveyTrak system, and train the research team on using these reports. All data will be collected by ETI's interviewers in PR and will be encrypted and transmitted daily via SurveyTrak to a secure SRC server. SRO will also assist with data processing.		
SRO Project Period	01/2022 - 12/2023		
Data Col Period			
Security Plan	NA		

Milestones				
	Pre Production Start: 10/01/2021		*Pretest Start:*	
	Pretest End:		*Recruitment Start:*	
	Staffing Complete:		*GIT Start:*	
	SS Train Start:		*SS Train End:*	
	DC Start:		*DC End:*	

Other Project Team Members	Shonda Kruger-Ndiaye & Camila Kendall -- Co-Project Leads Raphael Nishimura -- Sampling Tech Team: Marsha Skoman (Tech Lead & STrak Programmer), Jude Purillo (Lead Blaise Programmer), Kelly Lieske (Programming Support), Valyn Dall (Data Manager), Jennie Williams (Data Management Support), Emmanuel Ellis (Help Desk), Cheng Zhou (Database setup), Lihshwu Ke (Database set up) Spanish Testing and Project Support: Liliana Grueber, Alondra Ortiz-Ortiz, Mabel Hernandez Duran (PSID Temp)
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	Sep, 2023 (PR-PSID)	Implementing
Risk Level	Some Concerns	
Monthly Updates	SRO provided PIs with NIA proposal budget updates. SRO submitted IRB amendment for pretest protocol and materials on 9/28. Had hoped to train on sample recruitment in early/mid-October, but are waiting for IRB approval to schedule the training. As of 10/18, still awaiting approval. Worked with SRO finance to receive approval to use Speechify (AI voice generator) to hopefully make training video creation more efficient.	

SRO provided ETI with GIT manual to review and flagged a couple of sections for ETI specific updates. Let ETI know that they will need DUO on all IWER cell phones.

Training material development and translation are still underway -- it will not be feasible to train in November. Planning to postpone training until January -- dates TBD. September Cost report was updated to include additional projections for management to support the January training.

SurveyTrak testing (project specific and regression testing) began in September. Blaise instrument testing is on-going.

Special Issues	Timeline concerns -- Timeline contingent on: training materials development and translation, systems testing, and IRB approval. Sample Recruitment has been delayed pending IRB approval.			
Cost as of Oct 18, 2023	*Total Cost to Date (direct + indirect):*			420,430.07
	Est Cost at Completion (E$AC):			1,319,211.41
	Total Budget:			1,292,585.00
	Variance (Total Budget minus- E$AC):			-26,626.41
	Reason for Variance:	Projected cost to complete increased by ~32K. Biggest driver was adding projections in management categories to reflect postponement of training until Jan.		
Projections as of Oct 18, 2023	*Dollars Projected for Month:*			44,548.96
	Actual Dollars Used:			34,482.92
	Variance (Projected minus Actual):			10,066.04
	Reason for Variance:	Actuals in tech categories were lower than projections.		

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

Other Measures

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

Milestones		
Pre Production Start: 10/01/2022		*Pretest Start:* 04/24/2023
Pretest End: 05/14/2023		*Recruitment Start:* 07/01/2023
Staffing Complete: 09/01/2023		*GIT Start:* 12/12/1999
SS Train Start: 01/18/2024		*SS Train End:* 01/22/2024
DC Start: 01/22/2024		*DC End:* 07/31/2024

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

Report Period	Sep, 2023 (PSID CDS 2023) Initiation
Risk Level	On Track
Monthly Updates	CDS PIs received funding but further discussion is needed about how it will be allocated. Per PI, SRO may receive about $4M in direct funds and we project spending $3.2M on Phase 1 of the CDS 2023 study (remote, phone-web interviews with PCGs and their children). CDS 2023, at this point, will not include at-home components -- adminstration of Woodcock-Johnson, Saliva, and PM measurements.
	After the pretest a decision was made not to include Zoom interviewes with 8 - 11 in the production scope.
	We are currently in the prod development phase aiming for the training freeze 12/14. Training is scheduled for 1/16/2024.
	Development is focusing on:

-- IVR: 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.
-- Self Scheduler: we are working with Hueichun to extend capabilities of the self-scheduler emailing and texting platform to use it for all central texting and emailing during the CDS project (drafted 10 - 15 messages which will be sent centrally)
-- MSMS Updates: add communication for adolescents / PCGs
-- ST updates: recording interventions, other minor tweaks.
-- Instruments: Spanish and streamlining navigation between CS and PCG instruments.

Training and Staffing:
-- We've sent invitations to 55 selected OS who applied for CDS 2023. Posting for TLs, PCs, and locators is now active.
-- We plan remote only training.

| Special Issues | Budget: as of August we still don't have a clear expectation for when the funding will be awarded.

Tech systems: CDS tech development is ceding programming time to allow for TAS and Core Saliva launches. |
|---|---|

Cost as of	**Total Cost to Date (direct + indirect):**		0.00
	Est Cost at Completion (E$AC):		0.00
	Total Budget:		0.20
	Variance (Total Budget minus- E$AC):		0.00
	Reason for Variance:	CDS is under contingency funding awaiting funding decision from NIH. We spent $405K direct through August (after applying $178K funds provided by the PI to the cost incurred Sep 2022 - Feb 2023).	
Projections as of	**Dollars Projected for Month:**		0.00
	Actual Dollars Used:		0.00
	Variance (Projected minus Actual):		0.00
	Reason for Variance:	In July, we projected spending $59 but spent $40K.	

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

Project Name	**(PSID TAS 2023) Transition to Adulthood within its Life Course & Intergenerational Family Context (On Track)**
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	*Project Lead:* Elizabeth Ohryn
	Budget Analyst: Ivanna Iavorska-Em
	Production Manager: Carolyn Vieira-Martinez
	Senior Project Advisor: Stephanie A Chardoul
	Production Manager 1: Daric Thorne
	Production Manager 2:
Proposal #	no data
Description	TAS 2023 is the 10th Wave of TAS study, part of the PSID Suite of projects.
	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.
SRO Project Period	05/2023 - 07/2024
Data Col Period	10/2023 - 05/2024
Security Plan	NA

Milestones			
Pre Production Start: 05/01/2023		*Pretest Start:*	
Pretest End:		*Recruitment Start:* 07/23/2023	
Staffing Complete:		*GIT Start:* 10/03/2023	
SS Train Start: 10/02/2023		*SS Train End:* 10/06/2023	
DC Start: 10/03/2023		*DC End:* 05/31/2023	

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)

Report Period	Sep, 2023 (PSID TAS 2023)	Planning
Risk Level	On Track	
Monthly Updates	Summary of September 2023 Activities	

Staffing/Training:
7 iwers remain staffed on the project after losing 1 due to attrition. The project also has 4 TLs and 2 locators, which are unchanged. Locator training took place the first full week of September with a focus on Respondents without complete contact information. Locating will be done in Excel and stored on a secure server until data collection systems are ready for information import. The project team continues to meet regularly to plan for interviewer and team leader training in early October.

Management:

The team has divided efforts between testing, training prep, and production prep. This has allowed different focuses depending on time, expertise and items of focus at the start of production launch.

Technical:
MSMS system and template testing and revision was a large activity in September with the aim of system freeze for both production and training.

Production freeze was extended by 5 days without an impact on the data collection launch. These adjustments were made possible without a delay to production by adjusting the start of interviewer training by one day. This extension was needed due to a critical Blaise bug identified by IDPM that allowed Rs under 18 to start a web interview. This programming fix required an INT2 project and the unexpected shutdown on VPN affected the testing of these updates prior to freeze.

Special Issues		
Cost as of Oct 18, 2023	*Total Cost to Date (direct + indirect):*	228,541.45
	Est Cost at Completion (E$AC):	1,378,642.54
	Total Budget:	1,457,428.00
	Variance (Total Budget minus- E$AC):	78,785.46
	Reason for Variance:	Data collection scope in the process of being finalized. Allocations will be updated based on PI requests and final project specifications.
Projections as of Oct 18, 2023	*Dollars Projected for Month:*	108,456.70
	Actual Dollars Used:	90,043.85
	Variance (Projected minus Actual):	18,412.85
	Reason for Variance:	Actuals in tech and project management categories were lower than projections.

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

Project Name	**(PSID23) Panel Study of Income Dynamics Core 2023 (Some Concerns)**
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects
Budget	**Direct Budget**: 6,235,802.00 **Indirect Budget:** 0.00 **Total Budget:** 6,235,802.00
Principal	Katherine McGonagle (UM-SRC-PSID)
Investigator/Clients	Narayan Sastry (UM-SRC-PSID)
	Esther Friedman (UM-SRC-PSID)
Funding Agency	
IRB	**HUM#:** HUM00062417 **Period of Approval:** 3/22/22-3/21/24
Project Team	**Project Lead:** Rachel Anne Orlowski
	Budget Analyst: Ivanna Iavorska-Em
	Production Manager: Stacy Quisenberry
	Senior Project Advisor: Stephanie A Chardoul
	Production Manager 1: Daric Thorne
	Production Manager 2: Shonda R Kruger-Ndiaye
Proposal #	no data
Description	The Panel Study of Income Dynamics (PSID--also known to Respondents as the Family Economics Study or FES) is a longitudinal survey of several thousand individuals and their families, carried out since 1968 and conducted every two years. The sample is comprised of respondents from the 4,800 original families as well as new (immigrant) sample added in 1997/1999 and 2017/2019. The total 2023 sample size will be approx. 11,200, with approx. 9,650 completed interviews expected. Most of the information collected is about family composition and changes (marriages, divorces, births, deaths, people moving in and out); income sources and amounts; employment and pensions; and wealth. There are also questions about housing; education; vehicles; health; fertility; COVID-19; and money spent on food, healthcare, and school. The main focus is on how these family composition and financial factors interact with each other and how they change over time. The survey will be administered via web and telephone, with the expectation that more surveys will be completed via web than telephone (which will be a first for the study).
	During the 2023 wave, saliva samples will be collected for the first time on PSID Core. The Core interview must be completed to be eligible for saliva collection. Saliva sample participants that are eligible for collection during Core are adults related to Child Development Supplement (CDS) children but do not live with them. Interviewers will be trained on both the interview and saliva collection protocols. Both data collection efforts will be managed in the same MSMS project.
	The 2023 waves of CDS and the Transition into Adulthood (TAS) will follow PSID Core data collection. CDS and TAS eligibility is dependent upon completion of PSID Core.
SRO Project Period	03/2022 - 09/2024
Data Col Period	03/2023 - 02/2024
Security Plan	NA

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

Other Project Team Members	TSG Tech Leads - Jim Rodgers, Jeff Smith, & Karl Dinkelmann; Data Manager - Brad Goodwin & Ed Green; 68ID Site Programmer - Ashwin Dey; Blaise Programmer - Jude Perillo; MSMS Programmers - Pam Swanson & Darnell Christian; Self Scheduler Programmer - Peter Sparks; Help Desk - David Bolt, Andrea Pierce, & Deb Wilson; Production Tech Support - Sarah Broumand; Testing Coordinator - Camila Kendall; SSL Production Manager: Carolyn Vieira-Martinez; DCO Production Manager: Lorraine Bird; Saliva Project Manager: Mark Nathin; Project/Production Support - Saujanya Acharya, Mat Luna, Janet McBride, & Xiomara Lorenzo-Guerra; Reporting, Mapping, & Sample Assignment - Ji Qi & Wen Chang
Other Project Name	PSID Core 2023
Sample Mgmt System	MSMS
Data Col Tool	Blaise 5
Hardware	Laptop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	Camtasia
Incentive	Yes, R; Yes, Other (Locator, Proxy)
Administration	ISR Group (PSID)
Payment Type	Check, post (Varies); Cash, post (Varies); Other (electronic, post--JP Morgan)
Payment Method	Check through other system (PSID will handle check & e-payment via RAPS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (PSID will handle check & e-payment via RAPS)

Report Period	Sep, 2023 (PSID23)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Summary of September 2023 Activities - Forthcoming (expected to be posted by 10/26)		
Special Issues	Unable to staff as many on-staff interviewer hours as budgeted -- many shared agreements. Need more new hires than anticipated, which has a sizable negative impact on the budget and proposes a risk to data collection. 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. Spanish interviewing and saliva data collection started later than originally planned.		
Cost as of Oct 23, 2023	**Total Cost to Date (direct + indirect):**		3,409,749.94
	Est Cost at Completion (E$AC):		6,211,485.96
	Total Budget:		6,235,802.00
	Variance (Total Budget minus- E$AC):		24,316.04
	Reason for Variance:	Still reviewing September CRS but cost values reflect 10/23/23 projections. Note: CRS has the main iw and saliva budgets loaded. Unable to separate Core IDC costs from Contact Update IDC costs. Cost values only reflect Direct Costs.	
Projections as of Oct 23, 2023	**Dollars Projected for Month:**		408,722.31
	Actual Dollars Used:		343,750.24
	Variance (Projected minus Actual):		64,972.07
	Reason for Variance:	Still reviewing September CRS but cost values reflect 10/23/23 projections. 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:	6625	63%	4.4
	Estimate at Complete:	8956	85%	5.73
	Variance:	690	4%	0.85
Other Measures	Notes for Measures Above: From Dashboard through 9/30/23. Units Completed = 6625 iws (1301 CATI--20%, 5324 web--80%). Sample Invited = 10,658. BUDGET ASSUMPTIONS: Mode of completion: 60% web & 40% CATI; Of the web completes, 38% do not require any interviewer effort. HPI: 5.42 = CATI completes; 7.21 = web completes w/ interviewer follow-up; 10.17 = non-sample/non-iw. Additional 1.74 HPI for FTF NRFU cases.			

Project Name	**(QoL & Hearing Loss) Quality-of-Life for Amish Children with Hearing Loss (On Track)**		
Project Mode	Primary: Cognitive IW Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 8,200.00	**Indirect Budget:** 0.00	**Total Budget:** 8,200.00
Principal Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Margaret Lee Hudson		
	Budget Analyst:		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1: Lisa Van Havermaet		
	Production Manager 2:		
Proposal #	no data		
Description	Cognitive interviews to develop a QoL instrument for Amish children with hearing loss		
SRO Project Period	02/2022 - 12/2023		
Data Col Period			
Security Plan	NA		

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

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

Report Period	Sep, 2023 (QoL & Hearing Loss)	Closing
Risk Level	On Track	
Monthly Updates	Margaret Hudson met with the research team at Michigan Medicine this month to discuss next steps on the project now that we have completed the original objectives. The audiologists are looking for a tool they can implement to help the see if the care they are providing is making a difference. Margaret will consult with them briefly this fall (2-3 hours) ahead of their December clinic to discuss a few changes necessary for the tool to be used for children ages 2-6 and then how to implement the questions in a standardized manner.	
Special Issues		

Cost as of Sep 30, 2023	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	8,200.00
	Variance (Total Budget minus- E$AC):	0.00
	Reason for Variance:	
Projections as of Sep 30, 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

Reason for Variance:

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

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

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

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

Report Period	Sep, 2023 (SAME)	Implementing
Risk Level	On Track	

Monthly Updates	Project Management:
	- Provide weekly updates and concerns to the SRO Admin team.
	- Continued to closely monitor the costs and adjust projections with the financial analyst.
	- Extended the data collection to Oct 14, 2023.
	- the project received IRB permission to roll out a one-time incentive to PCGs for facilitating the completion of assessment
	administrations. 12 families were eligible and offered the incentive.
	- Handled survey tablets operation in a timely manner
	Technical System Development and Testing/Training:
	- Worked with Tech staff to change the wash-out days from 26 to 14 days between modes
	- WJ scoring team has been testing processing to prepare final data scoring
	Interviewer Hiring & Training
	- closed out one iwer (currently have 6 iwers & 1 field leader)
	Production:
	-We recruited a total eligible kids - 139 (recruited 141 but 2 coded out) among 89 families
	- Production Stats: as of 9/30/23 - total 220 completes, RR 79% with a cumulative HPI of 2.89. We are on track managing the HPI.
	- Mode 1 completed: 119 (RR 86%)
	- Mode 2 completed: 101 (RR 73%)
	- Hardware:
	- one iwer made extra efforts to retrieve a tablet from a family since completing IW in August.
	- Other: the TSG staff helped with field iwers to restore the VPN connection since the UM campus wide internet outage.

Special Issues

Cost as of Sep 30, 2023	*Total Cost to Date (direct + indirect):*	245,550.61
	Est Cost at Completion (E$AC):	301,932.84
	Total Budget:	302,327.00
	Variance (Total Budget minus- E$AC):	394.16
	Reason for Variance:	The underrun amount was caused by readjusting the estimated projections across the board to mid-Oct 2023 since we will extend the production period. The biggest driver of the underrun was decreasing the non-salary costs in the travel-domestic, freight, and telephone categories.
Projections as of Sep 30, 2023	*Dollars Projected for Month:*	45,972.84
	Actual Dollars Used:	44,151.68
	Variance (Projected minus Actual):	1,821.16
	Reason for Variance:	The small amount of underrun was mainly due to decreased used hours among a few staff and interviewers.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	278	100	
	Goal at Completion:	278	100	
	Current Actual:	220	79	
	Estimate at Complete:	278		
	Variance:	58		

Other Measures

Project Name	(SCA 2023) Surveys of Consumer Attitudes (On Track)		
Project Mode	Primary: Telephone Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 1,332,352.00	**Indirect Budget:** 0.00	**Total Budget:** 1,332,352.00
Principal	Joanne Hsu (SCA)		
Investigator/Clients	Tuba Suzer-Gurtekin (SCA)		
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Theresa Camelo		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lisa J Carn		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations.		
	The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 600 interviews.		
SRO Project Period	01/2023 - 12/2023		
Data Col Period	12/2022 - 12/2023		
Security Plan	NA		

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

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

Report Period	Sep, 2023 (SCA 2023)	Initiation
Risk Level	On Track	
Monthly Updates	SCA September 2023 began as scheduled on WED 8/23 and ended as scheduled on MON 9/25; it was a 5 week data collection month. We completed 603 IWs for the month (322/180/101) 3 IWs ahead of goal (600:320/180/100), as a 3.32 HPI (.12 above the budgeted goal of 3.2 and .32 above our target goal of 3.0).	
Special Issues		
Cost as of Oct 17, 2023	*Total Cost to Date (direct + indirect):*	929,455.76
	Est Cost at Completion (E$AC):	1,266,307.24
	Total Budget:	1,332,352.00
	Variance (Total Budget minus- E$AC):	66,044.76
	Reason for Variance:	

Projections as of Oct 17, 2023   *Dollars Projected for Month:*   109,015.24

Actual Dollars Used:		98,270.55
Variance (Projected minus Actual):		10,744.69
Reason for Variance:		The projected underrun increased 11,532.23 since last month. Interviewer II and Mobile Devices were the biggest savings comparing actuals to projections, but several permanent staff charged less than projected, contributing overall to the increase in the projected underrun since last month.

Measures

	Units at Complete	RR	HPI
Current Goal:	600		3.0
Goal at Completion:	600		3.0
Current Actual:	603		3.32
Estimate at Complete:	603		3.32
Variance:	3.0		.32

Other Measures

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

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

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

Report Period	Sep, 2023 (SRS 2021)	Implementing
Risk Level	Attention!	
Monthly Updates	The Social Relations Study continues to be well behind schedule in terms of completing screeners and cases. Hours per screener are far higher than were budgeted, and the project has been hampered by excessive attrition before and after training.	

As of 10/17/2023, the project has only completed 340 interviews, compared to roughly 1600 expected interviews for the same time period. The project has finalized 1059 screener lines compared to about about 3129 expected for the same time period.
The production deficit is related to having fewer interviewers than needed, and higher hours per screen than budgeted. Screening continues to be very difficult, with some areas being very hostile to minority interviewers (or any interviewers). We reprinted respondent materials for SRS so that no Arabic is shown, in response to objections from households. A new twist is having households object to seeing only "White" on the race/ethnicity showcard --

Caucasian is now preferred. We are making adjustments but changes are awaiting IRB approval.

We have been working collaboratively with the PIs to attempt to develop protocol modifications to improve field data collection (however we have been clear that this will not recover lost time or money). Call limits on screening were approved by the PIs and are being implemented in the field. We will roll out an increase in the token of appreciation to $100, which just received IRB approval. That change will coincide with moving the token to the end of the interview (at the PIs request). We are in the process of recruiting experienced interviewers as travelers. We hope to train travelers at the end of November/beginning of December. Most English concerns letters received IRB approval during the week of October 8. We will begin using them shortly. The PIs also approved creation of a study brochure and a revised prenotification letter - that is being reviewed by the PIs and will be submitted to the IRB.

Special Issues	We are projecting that all of the project budget will be fully used for data collection, however we will not be able to take the budgeted number of interviews, given the excessively high HPI. This has been communicated to the PIs. We have asked the PIs for input on how much panel sample to release, given the lower expected number of newly-screened sample cases. The interviewing team is encountering resistance to screening. We cannot send minority interviewers to some areas, and even non-minority interviewers are experiencing hostility. This is impacting interviewer morale.

Cost as of Oct 17, 2023		
Total Cost to Date (direct + indirect):		1,189,309.81
Est Cost at Completion (E$AC):		5,876,610.11
Total Budget:		5,876,610.11
Variance (Total Budget minus- E$AC):		0.00
Reason for Variance:	The variance is insignificant. We are projecting that the entire budget will be used for data collection. We are assuming that the work scope will be decreased to match the budget available.	

Projections as of Oct 17, 2023		
Dollars Projected for Month:		540,130.22
Actual Dollars Used:		383,929.23
Variance (Projected minus Actual):		156,200.99
Reason for Variance:	Production is far lower than expected or budgeted due to excessive interviewer attrition and very high HPI. This means that interviewer travel, respondent payments and costs associated with production are all running lower than expected. We are making adjustments to these line items to lower monthly projections in line with production.	

Measures		Units at Complete	RR	HPI
	Current Goal:	3644	80% scr, 70% main	10.4 with screening
	Goal at Completion:			
	Current Actual:	340	31% scr, 48% main	19.3 with screening
	Estimate at Complete:			
	Variance:			

Other Measures	About 1/2 of the sample has been released to the field. RR shown above reflect completion based on the released sample. Current length 120 minutes, budgeted 140 minutes. Saliva participation rate is 85%, budgeted at 80%

Project Name	(STARRS-LS VA HEARTH) STARRS-LS VA - Housing, Employment, Assessment Risk, Transitions, Help (HEARTH) Project Qualitative Interviews (Some Concerns)		
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	**Project Lead:** Margaret Lee Hudson		
	Budget Analyst: William Lokers		
	Production Manager: Jaleesa Rosario Turner		
	Senior Project Advisor: Lisa S Holland		
	Production Manager 1: Meredith A House		
	Production Manager 2:		
Proposal #	no data		
Description	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. 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.		
SRO Project Period	05/2023 - 02/2024		
Data Col Period	08/2023 - 12/2023		
Security Plan	Yes		

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

Other Project Team Members	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

Report Period	Sep, 2023 (STARRS-LS VA HEARTH)	Implementing
Risk Level	Some Concerns	

Monthly Updates	· The U-M subcontract with Harvard was activated on September 5.
	· The HEARTH team worked on refining procedures for scheduling and post-interview activities; each step requires coordination between the management team and interviewers.
	· Meredith and Margaret met with Katie Koh and Jenny D'Olympia (research team) to review and discuss expectations for the timeline, budget, and coordination with interviewers.
	  o We have also discussed plans for coding the data and worked to establish procedures to manage that process and associated documents.
	· The interviewers have focused on making sure they have technical systems set up to be able to complete the interviews and review/edit transcripts after the interview.
	  o Remote tech setup has been difficult but CMT has been able to provide support and help get the interviewers ready for work.
	· We sent our first batch of email invitations on September 25, 2023, with interview appointments available beginning October 3, 2023.	

Special Issues	Given the later-than-expected start, as well as smaller than expected sample size (~600 instead of 1000) there are concerns about meeting the goal for completed interviews (up to 100) by the end of the contract period. We are also limited by interviewer availability. We are working to identify an additional resource to help support the Zoom interviews so that multiple interviews can be conducted at once now that we know that the interviewing team members have overlapping availability that could be constraining.	

Cost as of Oct 17, 2023	Total Cost to Date (direct + indirect):	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	89,942.00
	Variance (Total Budget minus- E$AC):	0.00
	Reason for Variance:	Getting set up in CRS

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

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

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

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

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

Report Period	Sep, 2023 (STARRS-LS Waves 3 & 4)	Implementing
Risk Level	On Track	
Monthly Updates	Activities for September 2023 include:	

Project Management and Planning:
? James and Meredith attended the quarterly GSC meeting on September 5.
? Meredith attended the meeting between the GSC Executive Council and the research team about future plans for STARRS research on September 22.
? We sent weekly production updates to the PIs, and reported on progress on the call with the Army/M&RA.
? Meredith created the agenda/notes and facilitated the weekly meeting with the STARRS project managers.
? We carried out bi-weekly meetings with M&RA to coordinate Safety Plan and respondent locating activities.
? The Year 4 sub-award:
o After the U-M internet outage was resolved, the agreement was sent to the U-M authorized signer for signature. We received notice from the U-M Office of Research and Sponsored Projects (ORSP) on September 11 that the award had been activated.
o Account codes were requested and available for staff on September 19.
o We began the process to identify hours and charges that need to be moved from the Year 3 to the Year 4 accounts either because they were hours or charges made after August 31 (end of the Year 3 no cost extension period) or to bring Year 3 accounts to a zero balance. Staff were asked to correct their timesheets where needed.
o The Year 4 sub accounts were requested for ICPSR and became available on September 27.
? Year 5 budget:
o USUHS requested a Year 5 budget which includes work on Wave 5. Meredith met with the SRO finance and proposal teams to discuss our plan which will be to produce a Year 5 budget assuming we start W5 preproduction April 2024 and production November 2024 (2 years after Wave 4). We will also produce a total budget (marginal cost) for all of Wave 5. Marginal because a number of costs are already budgeted in the existing Year 5 (e.g., Enclave and Management through February 2025).
o M&RA requested a memo describing Wave 5 for the GSC to review. On September 29, Meredith sent Wave 5 assumptions and parameters to USUHS to be used in the memo draft.
? IRB:
o The ORIO for the Replicate 9 letter that was mistakenly mailed to a respondent who withdrew from the study in Wave 3 was sent to USUHS for secondary review on September 6.
o An ORIO for emailing respondents to inform them the survey was back online after the internet outage was acknowledged by the U-M IRB on September 11 and by USUHS on September 21.
o An ORIO for the handling/additional token amount for the 28 partial cases in Replicate 9 with the wrong preload was acknowledged by the U-M IRB on September 13 and by USUHS on September 26.
? STARRS-affiliated, but not STARRS funded, work:
o VA/HEARTH project:
? We continued work on recruitment procedures, scheduling systems, Zoom interview parameters and master sample file set-up.
• The IRB amendment for using Google appointments in the scheduling process was approved by the U-M IRB on September 13 and by the Harvard IRB on September 20.
? The team continued work on defining post-interview activities such as file handling procedures, a standard PII redaction plan for interview coversheet information, and SFTP set-up for transferring interview transcripts to Harvard.
? We worked with the research team on their plan for coding the transcripts. We worked their procedures into our file management protocols.
? Margaret and Meredith met with Katie Koh and Jenny D'Olympia on September 22 to discuss timeline and budget, and interviewer expectations in terms of time, effort and establishing clear communication. We also discussed post-interview processes including transcript redaction and coding plans/procedures.
? We received enough interviewer schedule information by September 25 to be able to send out the first set of 25 recruitment emails. We received one response from that group. We sent a second set of 25 emails on September 28 and received five responses. We currently have two people scheduled and four in the process of being scheduled for interviews.
? U-M subcontract with Harvard:
• After the U-M internet outage was resolved, processing of the subcontract could move forward and it was activated on September 5. Account codes were requested and available for staff on September 19.
• Summary: The subcontract start date was March 1, 2023. The subcontract was received by U-M ORSP on June 12. Issues related to the publications restriction, VA data ownership and system security requirements were resolved by August 10. U-M received the final subcontract from Harvard on August 23. It was activated September 5 and accounts were available for use September 19, 2023.

Enclave and User Support:
? The UM-STARRS Drop box remained inaccessible to external users after the broader U-M internet outage was resolved on August 30.
o The Enclave team developed an alternate process for submitting drop box requests using Google Shared Drive.
o On September 13, we received notice from our IT group that non-UM staff had restored access to their Enclave drop box folders.
o Drop box access for both non-UM and UM project staff now requires Duo 2-factor authentication.
? 2023 repeat NDI search:
o U-M received word from M&RA on September 6 that the payment mechanism was accepted by the CDC and we could proceed with sending the 2023 submission file. The file was uploaded to the CDC's SFTP on September 13. We received the NDI data from the CDC on September 19. The data manager completed initial QC checks of the NDI data. It looks to be in order. We are planning late January 2024 for release.
? Standard Enclave activities continued. These include maintaining security requirements; processing background checks and Great Lakes Cluster (GLC) user access requests, drop box requests, ID swap and data transfer requests; managing software acquisition and updates; and providing user support as needed. Of particular note this month:

o Quarterly Review of U-M Enclave and GLC Access was circulated to all partners and completed by September 29.
o Work continued on configuration of a new Windows database server to replace a server version that will reach end of life in October 2023.
o The Enclave onboarding process continued for two VA fellows and three new Harvard analysts.
o Enclave off-boarding was completed for one U-M staff member.
o We tracked progress on four new DUAs for obtaining or retaining Enclave and/or Great Lakes Cluster access that were in process at USUHS/HJF:
? Analyst moving from the UCSD subaward to University of Hawaii at Manoa (UH). DUA complete September 14, 2023.
? Analyst moving from working under the U South Carolina subcontract to Cornell. DUA in process.
? Two VA fellows– one working with USUHS, the other with Harvard. DUAs in process.

Public Use Data:
? Wave 3:
o September 14, we received word from the ICPSR project manager that the U-M internet outage impacted their proposed timelines for the STARRS LSW3 curation. They have been delayed by a month, to the end of October. However, we are still on track with the release date we have communicated to the GSC, which is "Fall 2023."
? Biosample flags, administrative variables, and inventory document:
o The scope of work document and timeline of activities were reviewed and questions clarified. These documents will be iteratively updated as the work progresses.
o Harvard delivered the administrative data file and data dictionary to U-M on September 6. An updated file, with duplicate records removed, was delivered a few weeks later.
o Work on the biosample flags and administrative data tables got underway. We are targeting June 1 for these two pieces to be completed. The inventory document will follow.
? We awaited decisions from the Army/GSC on producing the genetic and bioassay files for public use and placing data in the NIH National Data Archive and Public use release for GWAS.

Wave 4 Production Updates:
? Wave 4 production statistics, as of October 4, 2023, are as follows:
o Replicates released: 10 of 14 released with 10,606 sample lines.
o Completed interviews: 7,355 (6,934 web; 421 phone).
o Replicate 8 ended production on September 23 with a final response rate of 75.5%, which is the wave average. We had added five production days to Replicate 8 due to days lost:
? All production was stopped 8/27-8/29 due to the U-M internet outage.
? There was no calling on 9/3-9/4 due to Survey Services Lab closure for Labor Day.
o Throughout the month, Replicate 9 spent time mainly in Phase 3. The response rate as of October 4 is 64.4% and tracking with the study average.
o Replicate 10 launched on September 18 and moved to Phase 2 one week later. The response rate is 30.0% and tracking about 3 percentage points below the average rate for this point in the protocol.
o The response rate for completed replicates (Reps 1-8) is 75.5%.

Safety Plan Results:
? The Wave 4 Safety Plan rate is 11.8% as of October 4.

Special Issues	No changes this month to the areas of risk and mitigation strategies.	
Cost as of Aug 31, 2023	*Total Cost to Date (direct + indirect):*	8,774,569.22
	Est Cost at Completion (E$AC):	12,816,568.34
	Total Budget:	12,809,390.00
	Variance (Total Budget minus- E$AC):	-7,178.34
	Reason for Variance:	After moving forward around $22K in ICPSR charges and adding more hours for one of the production managers, the final projected overrun amount is $7,178.
Projections as of Aug 31, 2023	*Dollars Projected for Month:*	305,508.15
	Actual Dollars Used:	277,184.78
	Variance (Projected minus Actual):	28,323.37
	Reason for Variance:	In August, we projected $305,508 and spent $277,185 ($28,323 less). Before updating the projections, the projected underrun was $28,604. About $22K in ICPSR charges were projected for the month but did not hit. These costs were moved forward. The Research Technician Lead line was underspent more than usual in August due to vacation time not having been reflected in the projections. We spent about $8,000 more than projected in Rpay; however, cumulatively, we have spent about $22K less than projected in Wave 4.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	10,800	75	10.2
	Goal at Completion:	10,800	75	10.2
	Current Actual:	7,571	75.5 (Reps 1-8)	12.1
	Estimate at Complete:	10,800	75	11
	Variance:			
Other Measures				

Developmental/Initiative Projects Dashboard

NonArchived Development Initiative and No-DataCol Projects

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

Project Name	**(TSME24 DCO System Support (483248)) TSME24 DCO System Support (483248) (Some Concerns)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 35,000.00	**Indirect Budget:** 0.00	**Total Budget:** 35,000.00
Principal			
Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Vivienne Y Outlaw		
	Budget Analyst: 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	*Pre Production Start:*	*Pretest Start:*
	Pretest End:	*Recruitment Start:*
	Staffing Complete:	*GIT Start:*
	SS Train Start:	*SS Train End:*
	DC Start:	*DC End:*

Other Project Team Members	
Other Project Name	
Sample Mgmt System	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Sep, 2023 (TSME24 DCO System Support (483248))	Implementing
Risk Level	Some Concerns	
Monthly Updates	1. Set up the iwer multiple assignment report 2. Migrated all the DCO systems from srowebadmin web server to SROWeb2 server. This includes the DCO DCSR, Recruitment websites, Candidate appointment scheduling websites and all the related sites. 3. Started to investigate the TeamTailor API task	

Special Issues		
Cost as of Oct 11, 2023	*Total Cost to Date (direct + indirect):*	6,070.02
	Est Cost at Completion (E$AC):	34,984.82
	Total Budget:	35,000.00
	Variance (Total Budget minus- E$AC):	15.18
	Reason for Variance:	working on work scope for API integration with new ATS TT
Projections as of Oct 11, 2023	*Dollars Projected for Month:*	3,212.76
	Actual Dollars Used:	1,258.54

	Variance (Projected minus Actual):		1,954.22
	Reason for Variance:	Once we have a better understanding of the task we will work out a detailed budget	

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

Other Measures	x

	Current Goal:
	Goal at Completion:
	Current Actual:
	Variance:

Project Name	**(TSME24 MSMS performance work (425267)) TSME24 MSMS performance work (425267) (On Track)**		
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	*Pre Production Start:*		*Pretest Start:*
	Pretest End:		*Recruitment Start:*
	Staffing Complete:		*GIT Start:*
	SS Train Start:		*SS Train End:*
	DC Start:		*DC End:*
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Sep, 2023 (TSME24 MSMS performance work (425267))	Implementing
Risk Level	On Track	
Monthly Updates	No activity for month	
Special Issues		

Cost as of Sep 30, 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 Sep 30, 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

		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) (On Track)**
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		
Pre Production Start:		*Pretest Start:*
Pretest End:		*Recruitment Start:*
Staffing Complete:		*GIT Start:*
SS Train Start:		*SS Train End:*
DC Start:		*DC End:*

Other Project Team Members	
Other Project Name	
Sample Mgmt System	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Sep, 2023 (TSME24 MSMS Working Group (425197))	Implementing
Risk Level	On Track	
Monthly Updates	Held final meeting of the Protocol Summaries and Testing group and completed the report (to be reformatted and added to MSMS documentation site).	
	Held second meeting of the Data Standards group and updated report. Next meeting scheduled for October 2023.	
Special Issues		
Cost as of Oct 17, 2023	*Total Cost to Date (direct + indirect):*	586.20
	Est Cost at Completion (E$AC):	12,980.37
	Total Budget:	15,000.00
	Variance (Total Budget minus- E$AC):	2,019.63
	Reason for Variance: Members not charging the short code.	
Projections as of Oct 17, 2023	*Dollars Projected for Month:*	1,069.44
	Actual Dollars Used:	498.91
	Variance (Projected minus Actual):	570.53
	Reason for Variance: Members not charging the short code.	

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

Other Measures

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

Project Name	**(TSME24 QC Systems (483249)) TSME24 QC Systems (483249) (On Track)**
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives
Budget	**Direct Budget**: 49,500.00 **Indirect Budget:** 0.00 **Total Budget:** 49,500.00
Principal Investigator/Clients	
Funding Agency	
IRB	*HUM#:* *Period of Approval:*
Project Team	*Project Lead:* Sarah Elisa Broumand
	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	*Pre Production Start:* *Pretest Start:* *Pretest End:* *Recruitment Start:* *Staffing Complete:* *GIT Start:* *SS Train Start:* *SS Train End:* *DC Start:* *DC End:*
Other Project Team Members	
Other Project Name	
Sample Mgmt System	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Sep, 2023 (TSME24 QC Systems (483249))	Implementing
Risk Level	On Track	
Monthly Updates	New QC dashboard design has been started and planning for releasing to SRO Production Managers. Most hours spent working on dashboard and attending meetings.	
Special Issues		
Cost as of Oct 17, 2023	*Total Cost to Date (direct + indirect):*	2,738.98
	Est Cost at Completion (E$AC):	49,128.04
	Total Budget:	49,500.00
	Variance (Total Budget minus- E$AC):	371.96
	Reason for Variance: minimal cost variance	
Projections as of Oct 17, 2023	*Dollars Projected for Month:*	1,921.42
	Actual Dollars Used:	928.02
	Variance (Projected minus Actual):	993.40
	Reason for Variance: Resource availability is mostly responsible to spend these dollars. Hours will be carried forward.	

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

Other Measures

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

Other Measures

Project Name	**(TSME24 SRO System Maintenance - General (483910)) TSME24 SRO System Maintenance - General (483910) (On Track)**
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		
Pre Production Start:		*Pretest Start:*
Pretest End:		*Recruitment Start:*
Staffing Complete:		*GIT Start:*
SS Train Start:		*SS Train End:*
DC Start:		*DC End:*

Other Project Team Members	
Other Project Name	
Sample Mgmt System	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Sep, 2023 (TSME24 SRO System Maintenance General (483910))	Implementing
Risk Level	On Track	
Monthly Updates	ST/PB Build Team meetings (include Pam S. Marsha S, Ashwin D, Jeff S, & Holly A.) Change PowerBuilder developer passwords Released ST Admin Crowdstrike documentation & meeting CPS/RPS into for Jim Rodgers	

Special Issues		
Cost as of Oct 16, 2023	*Total Cost to Date (direct + indirect):*	20,000.00
	Est Cost at Completion (E$AC):	21,217.74
	Total Budget:	1.00

	Variance (Total Budget minus- E$AC):			-1,217.74
	Reason for Variance:			
Projections as of Oct 16, 2023	*Dollars Projected for Month:*			2,078.44
	Actual Dollars Used:			1,036.80
	Variance (Projected minus Actual):			1,041.64
	Reason for Variance:	Sept tasks completed listed below		

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

Other Measures

Project Name	**(TSME24 SSL Autoscheduler interface development (42) TSME24 SSL Autoscheduler interface development (423463) (On Track)**		
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	*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	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	Sep, 2023 (TSME24 SSL Autoscheduler	Implementing
Risk Level	On Track	
Monthly Updates	We are meeting in early October to confirm timelines and expectations. Current plan is to complete Phase I of the Auto Scheduler interface by January 2024. Generally on track.	
Special Issues		
Cost as of Oct 17, 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 Oct 17, 2023	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	0.00

Variance (Projected minus Actual):				0.00

Reason for Variance:

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

Other Measures

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

Other Measures

Project Name	(TSME24 STrak: Migration to SQL Anywhere V17 () TSME24 STrak: Migration to SQL Anywhere V17 (483227) (On Track)		
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	*Pre Production Start:*	*Pretest Start:*
	Pretest End:	*Recruitment Start:*
	Staffing Complete:	*GIT Start:*
	SS Train Start:	*SS Train End:*
	DC Start:	*DC End:*

Other Project Team Members	
Other Project Name	
Sample Mgmt System	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Sep, 2023 (TSME24 STrak: Migration to SQL Anywhere V17 ()	Initiation
Risk Level	On Track	
Monthly Updates	Creation of 32 bit ODBC	
Special Issues		

Cost as of Oct 13, 2023	*Total Cost to Date (direct + indirect):*	347.82
	Est Cost at Completion (E$AC):	25,128.77
	Total Budget:	10.00
	Variance (Total Budget minus- E$AC):	4,871.23
	Reason for Variance:	
Projections as of Oct 13, 2023	*Dollars Projected for Month:*	2,753.44
	Actual Dollars Used:	0.00
	Variance (Projected minus Actual):	2,753.44
	Reason for Variance:	

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

Other Measures

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

Other Measures