Survey Research Operations

Monthly Project Report

Sponsored Data Collection Projects and Development Initiative

October 2023

Sponsored Data Collection Projects and Development Initiative Projects

(ANES 2024) American National Election Studies - 2024

(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 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 Working Group (425197)) TSME24 MSMS Working Group (425197)

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

(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)

NonArchived Sponsored Projects

Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
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	Initiation	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	Implementing	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	Implementing	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	Initiation	Meredith A House	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢

Project Name	(ANES 2024) American National Election Studies - 2024 (On Track)		
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	Oct, 2023 (ANES 2024)	Implementing
Risk Level	On Track	
Monthly Updates	We stopped the in-person interviews at the beginning of November. We conducted 151 in-person interviews. 92 (61%) of the completed in-person interviews have scheduled an appointment for the video interview (a finding), with 47 completed video interviews (51%) (another finding, down from 60% earlier in the study) 150 video interviews will be unattainable. Andrew and project staff have had limited discussion about what we should use the remaining resources (if any one). One idea is some sort of non-response follow-up to understand why a subset of respondents didn't scheduled a video interview, or show up, if they did schedule an interview. A debriefing with the interviewers and project staff happened on 11/10. Project staff drafted a report (presentation) for the board meeting on 11/16.	
Special Issues		
Cost as of Nov 14, 2023	*Total Cost to Date (direct + indirect):*	139,946.57

	Est Cost at Completion (E$AC):		210,552.96
	Total Budget:		7,024,812.00
	Variance (Total Budget minus- E$AC):		1,346.04
	Reason for Variance:		
Projections as of Nov 14, 2023	*Dollars Projected for Month:*		72,971.58
	Actual Dollars Used:		70,340.28
	Variance (Projected minus Actual):		2,631.30
	Reason for Variance:	Pretty accurate (96%)!	

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	200/160		
	Goal at Completion:			
	Current Actual:	151/47		
	Estimate at Complete:			
	Variance:			
Other Measures				

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	Oct, 2023 (BHM Library Project)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Pilot questionnaire approved with changes as exempt by IRB.	
Special Issues	Obtaining contact information at libraries continues to be a challenge.	
Cost as of Nov 16, 2023	*Total Cost to Date (direct + indirect):*	35,978.81
	Est Cost at Completion (E$AC):	196,876.88
	Total Budget:	197,671.00
	Variance (Total Budget minus- E$AC):	794.12
	Reason for Variance: See	
Projections as of Nov 16, 2023	*Dollars Projected for Month:*	25,133.06
	Actual Dollars Used:	7,157.23

		Variance (Projected minus Actual):			17,975.83
		Reason for Variance:	TSG Programming hours were projected and not used.		

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

Other Measures

		Variance (Projected minus Actual):			17,975.83
		Reason for Variance:	TSG Programming hours were projected and not used.		

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

Other Measures

Project Name	**(CAMS 2023) HRS 2023 Consumption and Activity Mail Study (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	Oct, 2023 (CAMS 2023)	Implementing
Risk Level	On Track	
Monthly Updates	During the month of October, the team worked on logging, shipping, and providing sample and pull lists for the November 1 reminder mailing. 1. 1st questionnaire mailing dropped on October 4. Subsequent mailings are scheduled for November 1, November 15, and December 4. 2. Due to slower mail times and the Thanksgiving holiday, we are pushing the final questionnaire mailing to December 4 from November 29 to reduce chance of mailing another questionnaire to respondents who have completed the questionnaire. 2. We are struggling with getting logger time in the SSL. Plans have been made to add Manpower temps to the rotation and train them on 11/21. 3. 3,056 CAMS lines have been finalized of which 2,758 have completed the questionnaire. The current response rate is 44%. 4. Approximately 1,000 to Duplicating for scanning as of 11/17.	

Special Issues	Due to the Thanksgiving holiday and lagging mail delivery, it was decided to push the final mailing to Dec 4 in order to have time to get logging completed after the holiday.

Cost as of Nov 16, 2023	*Total Cost to Date (direct + indirect):*	311,837.01
	Est Cost at Completion (E$AC):	400,048.91
	Total Budget:	473,136.00
	Variance (Total Budget minus- E$AC):	73,087.09
	Reason for Variance:	The variance is primarily due to staff assigned to the project compared to budgeted resources. The difference between the September and October variance: CASIC and Field Ops Recharges did not get charged in November and Rpay Void Checks for incorrectly printed spouse checks did not hit in October as expected. Future projections adjusted.

Projections as of Nov 16, 2023	*Dollars Projected for Month:*	952.12
	Actual Dollars Used:	48,454.34
	Variance (Projected minus Actual):	-47,502.22
	Reason for Variance:	October CASIC and Field Ops Recharges and Rpay voids expected to hit in October will hit in November. Future projections updated.

Measures		Units at Complete	RR	HPI
	Current Goal:	2,916	46%	
	Goal at Completion:	3,470	59%	
	Current Actual:	2,578	44%	
	Estimate at Complete:	3740	59%	
	Variance:	0	0%	

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	Oct, 2023 (Care & Help Study)	Implementing
Risk Level	On Track	
Monthly Updates	No project related work for SRO in October.	
	The PI received notice of additional funding for 4 more focus groups to be added, with funding beginning in November 2023. Set November meeting with PI to discuss timeline/next steps.	
Special Issues		
Cost as of Nov 16, 2023	*Total Cost to Date (direct + indirect):*	2,425.39
	Est Cost at Completion (E$AC):	22,791.91
	Total Budget:	27,236.00

	Variance (Total Budget minus- E$AC):			4,444.09
	Reason for Variance:	Revised work scope in summer; first two focus groups took less effort than projected largely because PI took on recruitment, scheduling, and confirming participants.		
Projections as of Nov 16, 2023	*Dollars Projected for Month:*			150.84
	Actual Dollars Used:			242.38
	Variance (Projected minus Actual):			-91.54
	Reason for Variance:	Incorrectly charged hours by HelpDesk in October. Timesheet is being corrected to remove the hours.		

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 Leibetreu, James Koopman, Minako Edgar, David Ackuaku, Carl Remmert
Other Project Name	CARE-CSI Military
Sample Mgmt System	Other (non-SRO)
Data Col Tool	Other (non-SRO)
Hardware	Laptop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, R
Administration	Other (Kinesiology)
Payment Type	Check, post ($150)
Payment Method	Other (Kinesiology)

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

- Worked with the PI team on the possible future Military project.
- worked with Financial analyst to modify costs for the project closeout.
- Prepared the PI monthly report

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:
- has been preparing reports.

7. Locating N/A

Special Issues				
Cost as of Oct 31, 2023	**Total Cost to Date (direct + indirect):**	1,684,845.27		
	Est Cost at Completion (E$AC):	1,684,845.27		
	Total Budget:	1,685,902.70		
	Variance (Total Budget minus- E$AC):	1,057.43		
	Reason for Variance:	The project closed on 8/31/2023. We have been adjusting some pending costs from previous months and the Civilian project.		
Projections as of Oct 31, 2023	**Dollars Projected for Month:**	0.00		
	Actual Dollars Used:	342.14		
	Variance (Projected minus Actual):	-342.14		
	Reason for Variance:	The overrun of Oct due to pending non-salary costs moved from September.		

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	Oct, 2023 (CARE SALTOS MTEC)	Implementing
Risk Level	On Track	
Monthly Updates	1. Project Management:	

Monthly Updates

1. Project Management:
-SRO continued to work with the PI team to find solutions to resolve International TOA issues.
-SRO continue to work with Datalys and QG to tackle issues/bugs that reported from the interviewers. This has serious implications on affecting HPI of the field.
-In addition, SRO has been working with Datalys and QG to resolve consent issue, which caused production pause currently.
-The management team worked with the PM to find ways to increase productivity.

2. CARE SMS system:
-SRO continued to work with QG alongside with the PI team and Datalys on resolving ongoing technical issues.
-SRO started to receive data and run the bi-weekly reports after the UM campus wide internet outage incident.

3. Questionnaire Development –N/A

4. Production: as of 10/31/2023 (Total Released samples = 13369 (DCP3)
Total Completed Iws = 883 (RR = 6.6%)
-Web = 876
-CATI = 7

5. Hiring and Training
-Started the dialogue with the PI team on the need to hire more on-staffers to work on Civilian project.

6. DMSS:
- SRO DM is working on the bi-weekly reports for the dashboard.

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 had success to locate potentials Rs.
  - worked 135 lines
  - 4 finds
  - 2 completed Iws

Special Issues

Cost as of Oct 31, 2023	Total Cost to Date (direct + indirect):	1,469,332.18
	Est Cost at Completion (E$AC):	4,724,241.60
	Total Budget:	4,685,914.00
	Variance (Total Budget minus- E$AC):	-38,327.60
	Reason for Variance:	The budget is for the next two years (ending 2026). We have been monitoring closely through each production waves. We will continue to adjust the overrun accordingly.
Projections as of Oct 31, 2023	Dollars Projected for Month:	103,432.59
	Actual Dollars Used:	125,013.88
	Variance (Projected minus Actual):	-21,581.29
	Reason for Variance:	The overrun amount was caused by interviewers charged more than expected - monitoring closely moving forward

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	Oct, 2023 (CCS) Implementing
Risk Level	Some Concerns
Monthly Updates	October was a busy month on CCS. We sent five emails to students at the four colleges, responded to hundred of respondent emails, processed thousands of TOAs, worked extensively on sample reconciliation procedures, and got set up for texting. The researchers also decided to extend the Wave 1 production period and returned to PGCC for another round of visits. By the end of October, we had collected about 4,000 sample responses. CCS overcame several unexpected challenges in October, including the TC IRB taking more time than expected to review protocol revisions, hundreds of respondents writing in to request help with gift cards, HSIP resistance to providing gift card activation statuses, getting new sample contacts, expiring survey links requiring new links be generated and new email distributions in Qualtrics, our phone number requiring special vetting by Aerialink, text messages being blocked, our emails to one college being blocked, reaching out to respondents with incomplete data needed for TOAs, automating cleaning processes for TOA data, and troubleshooting how to estimate response rates with the complex data.

Special Issues	Sample reconciliation has been a major hurdle on CCS. Ed and Jennie have put in a lot of time, and it is still unclear if we have the response rate numbers we need or that they're stable; the estimates gone up and down over the last month based on small errors being found in the cleaning process. In Wave 2, the data management should be much cleaner, because we will not have any anonymous completers or multiple points of access for respondents (i.e., they will not be sent multiple personalized links). Plus, Web SMS will track respondent information. So, this might not be an ongoing issue.	
	The researchers are hoping that SRO can cover some costs for the respondent pre-payment; however, we do not have the funds in the sub award to contribute much. I will likely recommend they break up their planned post-payment ($30) into a $5 pre-payment and $25 post-payment, because it is much less likely that tacking on $5 to a $25 post-payment would have an effect on response rates compared to a $5 pre-payment. That said, getting the pre-payment to all respondents is not likely, because we believe that many respondents provided fake addresses (many are immigrants who do not live in the U.S.).	

Cost as of Oct 31, 2023	*Total Cost to Date (direct + indirect):*	223,803.57
	Est Cost at Completion (E$AC):	684,610.04
	Total Budget:	644,889.00
	Variance (Total Budget minus- E$AC):	-39,721.04
	Reason for Variance:	As of October, we are projecting around $40,000 overrun for the project. Here is a breakdown of expenses that have exceeded the project scope: Respondent payments: The full study budget for incentives is $201,600. In Wave 1, we have paid 4,789 respondents a total of $119,730. Extended Wave 1 timeline Due to a lower than expected response rate, we extended Wave 1 by 26 days, which required additional effort for managing data collection, processing incentives, responding to respondent inquiries, and data management. Wave 1 text message Before data collection started, the researchers and SRO team discussed text messaging in Wave 1. At the time, we did not think that we had consent to text and so did not send one, understanding that it may be a preferred mode of communication for many respondents. We did, however, have phone numbers for students at IVC, LCCC, and PGCC. SJC would not share students' phone numbers. In October, the research team shared the process the colleges use to collect students' consent to text with SRO Admin and TC IRB, requesting to send a text asap to help improve the lagging response rates we were observing. It was observed that students must opt to provide one or more phone numbers and to receive college-related text messages in order to receive them. Andrew set up an account with Aerialink, who reviews consent processes based on cell carrier requirements and TCPA. They requested more information on the process of obtaining consent to text. On account of this atypical request, Aerialink required extra time to review, which kept the project phone number in a special Pending state. They did not indicate on their website or in other communications that the phone number was Pending. SRO Admin and TC IRB reviewed and approved the request, and on 11/1, Hueichun and Shaowei requested over 10,000 messages be sent to the students, but about half were in a Pending state. Over five days of investigating and corresponding with Aerialink, Jeff found that the Pending designation limited the number of texts that could be sent on a day to 2,000. Thus, we tripped a spam filter. Jeff worked with Aerialink to remove the block and approve the phone number, so that the number has unlimited texting capacity moving forward. Hueichun and Shaowei sent texts to all numbers who did not get the first text. The text message response rates were between 3%-5%, in part likely due to the fact that most students who were interested in completing the survey already did so in the first six weeks of data collection. Translation services: ~$4-6k The Wave 1 translation services cost $2,700 and thus exceeded the study budget of $2,000. Wave 2 translation services are expected to be around the same price as in Wave 1. While the Wave 2 Main survey will be shorter, there are several updates and the additional Leavers survey to be translated. Survey programming: ~$12-15k In Wave 1, survey development took longer than expected and required programming effort well into data collection. In the project proposal, survey programming in Wave 2 was expected to require changes to less than 25% of the Wave 1 survey. The research team has since added a Leavers survey, which Steven is spec'ing and Marsha is programming in English and in Spanish. Incentive inquiry: We received around 300 email inquiries to the study inbox about tokens of appreciation. Steven and Jeff developed response templates. By far most of the messages received were not clear on the timeline to get their tokens or could not find their email. Steven has resolved all requests for support. Upon hearing from students that they were experiencing issues with their gift cards, the research team requested help in identifying who had received and activated them. The HSIP office said that they could

not lookup card activation statuses in bulk. The issue was escalated by Grant with the Business Office, and they pulled the activation statuses of all cards that had been sent (only 47% had activated them).

The researchers are concerned that problems getting and activating cards might undermine subsequent response rates and so are considering a $5 prepayment in January. They have requested that the SRO sub award help pay for it.

Response rate calculations

Using Qualtrics to collect data and manage the sample has been challenging. In the project proposal, the plan was to use Blaise software to program the CCS surveys. However, there was insufficient time and resources available to program the surveys in Blaise and set up a SMS between project launch in May and data collection in September. Also, the researchers and SRO project leads were experienced and comfortable using Qualtrics. That said, Qualtrics has several limitations that presented challenges in the context of this study.

The researchers brought anonymous links and QR codes for in-person data collection, because they anticipated students who were not from the sample would be present and wanted to give them the opportunity to complete the survey. There are 661 responses who completed via the anonymous link/QR code and do not appear to link back to the sample.

Qualtrics also cannot send the same link to multiple points of contact for a respondent (e.g., multiple email addresses). Rather, it creates a new link for each point of contact. We sent emails to both college and personal addresses, and students also had opportunities to complete using the QR code and anonymous link, so several students accessed the survey multiple times. We included a screener asking if they had already completed the survey, which caught most repeat completers, but not all.

Due to the timeline extension for Wave 1, several survey links expired and new ones had to be created, which also created an additional personal link that could be used to access the survey.

Projections as of Oct 31, 2023	Dollars Projected for Month:				96,587.45
	Actual Dollars Used:				84,443.22
	Variance (Projected minus Actual):				12,144.23
	Reason for Variance:	The underrun in October is primarily on account of fewer than expected respondent payments. Due to the lagging response rate, many will be reflected in November instead.			

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	Oct, 2023 (DCUS)	Initiation
Risk Level	On Track	
Monthly Updates	October activities: 1- Meetings with PIs and SRO team to discuss project updates and fielding plans. 2- Tested and fielded follow-up survey 3- Created and delivered SAS datasets to PI	
Special Issues		
Cost as of Nov 17, 2023	*Total Cost to Date (direct + indirect):*	32,964.98
	Est Cost at Completion (E$AC):	33,341.33

	Total Budget:		49,742.00
	Variance (Total Budget minus- E$AC):		16,400.67
	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 Nov 17, 2023	Dollars Projected for Month:		7,491.81
	Actual Dollars Used:		6,903.53
	Variance (Projected minus Actual):		588.28
	Reason for Variance:	Fewer respondent incentives were needed due to incompletes in the daily surveys.	

Measures		Units at Complete	RR	HPI
	Current Goal:	50 Baseline, 38 othr	100% Bsln, 75% Other	N/A
	Goal at Completion:	50 Bsln, 38 other	100% Bsln, 75% Other	N/A
	Current Actual:	49 FU, 48/day	100% FU, 95% Daily	
	Estimate at Complete:	49 FU, 48/day	100% FU, 95% Daily	N/A
	Variance:	N/A	N/A	N/A

Other Measures

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	Oct, 2023 (ECHO (Year 7))	Closing
Risk Level	On Track	
Monthly Updates	I'm still checking on final costs, but these numbers should be accurate within $110 Total. This report will be updated with absolute final costs if the totals here are incorrect.	
	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 Nov 16, 2023	*Total Cost to Date (direct + indirect):*	508,480.70
	Est Cost at Completion (E$AC):	508,480.70
	Total Budget:	525,576.00
	Variance (Total Budget minus- E$AC):	17,095.30
	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. Note: I'm using the CRS data pull to update this report. Total costs appear to have decreased by $108.33 since the report Bill sent as final 11/2/23. I'll check on this, then update this report to final or edit the final numbers for accuracy, then update and save.

Projections as of Nov 16, 2023	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	108.33
	Variance (Projected minus Actual):	-108.33
	Reason for Variance:	Variance was minimal. I haven't received a cost report reflecting this small variance so will follow up on its origin and accuracy.

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	Oct, 2023 (EDC-Endline)		Closing
Risk Level	On Track		
Monthly Updates	No substantial SRO activity this month.		
Special Issues	None		
Cost as of Nov 16, 2023	*Total Cost to Date (direct + indirect):*		1,200,841.46
	Est Cost at Completion (E$AC):		1,201,428.02
	Total Budget:		3,097,511.00
	Variance (Total Budget minus- E$AC):		1,896,082.98
	Reason for Variance:	See previous months' report.	
Projections as of Nov 16, 2023	*Dollars Projected for Month:*		10,870.02
	Actual Dollars Used:		4,122.71
	Variance (Projected minus Actual):		6,747.31
	Reason for Variance:	Virtually no change in projected project completion cost.	

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

Project Name	(HART) Health, Aging, and Retirement in Thailand (HART) - SRO consultation (2023) (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 (April 2023) involving a SRO data manager and Blaise programmer will travel to Thailand to work with the HART team. Trip two: HART team to U-M to take place between 8 - 29 September 2023 (originally planned for August). This visit will focus on the technical side of field survey management, programming, sampling and weights (including suggestions for sample design enhancements for Wave 5) and data management using HRS and HART as case studies.		
SRO Project Period	01/2024 - 10/2023		
Data Col Period			
Security Plan	NA		

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

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

Report Period	Oct, 2023 (HART)	Implementing
Risk Level	On Track	
Monthly Updates	October update: On 11/11 we received an email from the HART PI letting us know that just 65% of the funding for the HART Wave 5	

has been approved, making the budget very tight. They have decided to use Qualtrics as the data collection software for wave 5. They would like continued assistance from SRO but at a very low level (three meetings during wave 5) - other than this, the HART team will work independently with no programming assistance. We are currently re budgeting based on this and will send a formal proposal to the PI.

Special Issues

Cost as of Nov 16, 2023	*Total Cost to Date (direct + indirect):*	57,799.08
	Est Cost at Completion (E$AC):	57,799.08
	Total Budget:	71,543.00
	Variance (Total Budget minus- E$AC):	13,743.92
	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 Nov 16, 2023	*Dollars Projected for Month:*	1,858.80
	Actual Dollars Used:	2,478.14
	Variance (Projected minus Actual):	-619.34
	Reason for Variance:	Salary costs in October were higher than projected - time charged for post visit tasks (expense reconciliation, editing recordings of sessions, additional review of weight calculation) and laptop prep. work for GIT.

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:* 11/30/2023

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	Oct, 2023 (HCAP 2022)	Implementing
Risk Level	On Track	
Monthly Updates	HCAP production has been underway for 69 weeks. There are 2 weeks left in production. As of the end of last week, we have exceeded the R iw goal (by 49 iws) and the Inf iw goal (by 24 iws) for this wave of data collection! As of this morning, 5,714 interviews have been completed, including 3,037 R and 2,677 Inf. There are currently 29 appts (20 R, 9 Inf). The overall HPI is 4.87. 421 Spanish interviews have been completed (250 R, 171 Inf). Of the 20 Falsified (1 R, 19 Infs): 3 have been successfully interviewed 2 were originally refusals and Iwer falsified data, so they will be recoded as refusals 13 are still being attempted 2 are suspect and are being verified (faint voice that sounds like a phone iw but note states it's FTF and cash was given to R - definitely on Lloyd's list)	

There were 7 iws (2 R, 4 Inf) that needed to be verified because they could not be confirmed by listening to the recording. One of the R iws has a valid Inf iw so is likely valid as well, and one of the Inf iws has been confirmed as falsified. There is an additional R iw in which 4 of the recall tests toward the end of the interview were falsified while the R took a break to make coffee. The data for the falsified tests has been recoded as 'missing' and the iw recoded as a 1005. An ORIO was submitted by the PI this week for this sample line.

We will likely close out the project with a 150k direct overrun, while we were approved to go up to 190k.
We have been closely monitoring subgroup RRs, including Proxy, Black, and Hispanic. The proxy RR goal was 25% and we are currently at 27%.

We are in the process of creating an iwer Exit survey via Qualtrics and will send that out at the end of data collection.

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 Nov 16, 2023	*Total Cost to Date (direct + indirect):*			4,420,287.89
	Est Cost at Completion (E$AC):			4,701,473.30
	Total Budget:			4,488,000.00
	Variance (Total Budget minus- E$AC):			-213,473.30
	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 Nov 16, 2023	*Dollars Projected for Month:*			242,770.10
	Actual Dollars Used:			213,865.81
	Variance (Projected minus Actual):			28,904.29
	Reason for Variance:	Ann Arbor staff and Iwer hours came in very close to projections, but we overprojected TOA costs as costs were spread across months and there no more checks going out.		

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	5590	67.5%	4.8
	Goal at Completion:	5641	68%	4.8
	Current Actual:	5714	69%	4.87
	Estimate at Complete:	5755	70%	4.9
	Variance:	+114	+2%	+.1
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	Oct, 2023 (Health and Well Being in SE MI)	Implementing
Risk Level	Attention!	
Monthly Updates	The D-AMP project has collected only 55 main interviews and 41 informant interviews in just under six months of data collection. D-AMP was budgeted as a 10-month data collection and should be completing about 90 main interviews and 90 informant interviews per month (so we should have close to 540 main interviews, and 540 informant interviews for the same time frame). Hours per interview and hours per screener are far higher than budgeted. The field team has finalized 1,661 out of 3,205 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 (despite significant attrition), however the hours worked are not producing completed interviews. Eligibility is far lower than budgeted (currently around 10%, budgeted at around 17%), and 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 165-180 minutes (compared to 140 minutes budgeted). We presented the financial and production status to the PIs in September and again in early November, 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 a revised sampling strategy in late October. The new sampling strategy involves re-drawing the population sample to concentrate on segments where the population is expected to be over 50% MENA, and over-sample using an ethnicity flag from MSG (in addition to the age-related oversample using MDOT data). This new sample should improve the eligibility (and hopefully lower screening costs). Call limits are also being used to manage high screening costs.

We proposed and are in the process of implementing a number of changes to the field protocol, however progress is very slow due to the slow pace of translation and IRB approvals (both out of SRO control). An increase to the token of appreciation to $100 was implemented October 25, and appears to be generating more interest in the SRS sample. Concerns letters, revised prenotification letters, brochures and other changes are slowly making their way through translation and IRB approval. We have not yet had access to Arabic concerns letters (and over 60% of respondents require Arabic).

We are bringing on 9 experienced interviewers in early December (4 are local and 5 will be travelers). About half of these interviewers will be assigned to D-AMP.

We trained one LCD team member to use SurveyTrak, and that LCD team member has been making outreach calls to resistant households. She has also run into heavy resistance, however managed to get appointments for two main interviews and one informant interview.   The LCD team will bring on more "community influencers" and train them to make outreach calls to resistant households. These new LCD team members will use only paper & pencil coversheets and will be fully trained by the LCD team. In addition, the LCD is ramping up community outreach, however some outreach has been overshadowed by the war in the MidEast.

Special Issues	NOTE: Cost reports were not updated with current projections in time for MPR. 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. The PIs have not responded to two inquiries about the panel sample.
	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.

Cost as of Nov 16, 2023	**Total Cost to Date (direct + indirect):**	2,218,913.28
	Est Cost at Completion (E$AC):	3,756,418.88
	Total Budget:	3,758,127.00
	Variance (Total Budget minus- E$AC):	1,708.12
	Reason for Variance:	We expect that the full project budget will be used, given the very high HPI and low production on the project. We are not projecting an overrun - we are assuming that the work scope will be reduced to match the budget.
Projections as of Nov 16, 2023	**Dollars Projected for Month:**	190,363.79
	Actual Dollars Used:	115,178.28
	Variance (Projected minus Actual):	75,185.51
	Reason for Variance:	Respondent cooperation is extremely low. We have only completed 55 main interviews, resulting in lower than anticipated respondent payments, interviewer travel, and survey tech effort. We are modifying projections to accommodate the low level of production and travel and trying to project what the project can afford with the funding remaining. This is a work in progress.

Measures		Units at Complete	RR	HPI
	Current Goal:	930 main, 930 inf	60% scr, 74% main	10.38 w/screening
	Goal at Completion:			
	Current Actual:	55 main, 41 inf	39% scr, 35.7% main	52.0 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 (Some Concerns)		
Project Mode	Primary: Mixed Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 13,982,815.00	**Indirect Budget:** 5,033,815.00	**Total Budget:** 19,016,630.00
Principal Investigator/Clients	David Weir (ISR-SRC)		
Funding Agency			
IRB	*HUM#:* HUM000611128		*Period of Approval:* 6/7/2023-6/6/2024
Project Team	*Project Lead:* Evanthia Leissou		
	Budget Analyst: Richard Warren Krause		
	Production Manager: Andrea Sims		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: 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:* 12/21/2024

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	Oct, 2023 (HRS 2022 Panel & Baselines)	Implementing
Risk Level	Some Concerns	
Monthly Updates	1. The project team has been working on baseline production monitoring, cost monitoring, sample management,	

logging, weekly mailings (SSA and SAQ), payment and letter request processing, and preparing for and conducting the October training.

2. Mid October, an error was identified in the criteria that identifies eligible cases for SAQ and SSA reminder mailings which led to remainder mailings being missed for a portion of the Panel and Baseline sample. HRS Exec decided, for those whose reminders were missed, to only send SAQ reminders to baseline Rs whose interview was completed after July 1. The criteria has been fixed for Rs whose interviews were completed after the error was identified.

3. October screening and baseline interviewing training was conducted in Grand Rapids the last week of October. Of the 69 trainees, 66 interviewers certified on screening and baseline, 1 interviewer will work screening only, and 2 interviewers decided this was not the right fit for them.

4. Baseline production has been slow since Panel ended (averaging 50 baseline iws per week). Field managers continue to work with interviewers to prioritize baselines as well as on strategies for working with baseline Rs over screening.

5. Project team has been working with HRS Exec on strategies to implement an end game on baseline sample that was spawned from screener 120+ days.

6. Baseline interviewing will continue through 2024 due to the slow progress. Goals are in process of being updated now that the October training is done.

7. Based on the propensity model run in September, there are currently 2,615 cases have been priority of which 219 (8%) have completed an interview. Newly generated baselines from screening continue to be flagged on a weekly basis.

*The "measures" table reflects both Panel and Baseline combined as of 11/16.

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. - Slow progress with baseline interviewing. - 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 Nov 16, 2023	***Total Cost to Date (direct + indirect):*** 18,244,267.45
	Est Cost at Completion (E$AC): 18,056,011.48
	Total Budget: 19,016,630.00
	Variance (Total Budget minus- E$AC): 960,618.52
	Reason for Variance: Minimal change in variance since the previous month. 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. 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 Nov 16, 2023	***Dollars Projected for Month:*** 17,071.00
	Actual Dollars Used: 51,268.34
	Variance (Projected minus Actual): -34,197.34
	Reason for Variance: The primary reason for variance was due to biweekly hours worked in September that hit in October.

Measures		Units at Complete	RR	HPI
	Current Goal:	16,967	56%	11.0
	Goal at Completion:	23,468	46%	7.9
	Current Actual:	16,808	56%	11.0
	Estimate at Complete:	22,186	44%	10.8
	Variance:	1,282	2%	2.9

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: 23.3% (1,885 completed) from baselines spawned from screener as of 11/16/23. 2019 EGenX baselines: Goal RR: 70%, Current RR: 72.4%

Project Name	**(HRS 2024) Health and Retirement Study 2024 (On Track)**		
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	Oct, 2023 (HRS 2024)	Planning
Risk Level	On Track	
Monthly Updates	HRS 2024 preproduction activities continued with focus cost projections, technical specifications, technical development, testing, and signing the contract for the pretest training location and dates (Ypsi Marriott 1/27-1/28). *Milestone dates are tentative.	

Special Issues	Resource (Field Staff) concerns for HRS 2024 preproduction and production while HRS 2022 data collection. 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 Nov 16, 2023	*Total Cost to Date (direct + indirect):*	146,567.61
	Est Cost at Completion (E$AC):	825,881.88
	Total Budget:	821,421.00
	Variance (Total Budget minus- E$AC):	-4,460.88
	Reason for Variance:	Projections have been updated in CRS for pre-production and pretest data collection. Will update the total budget once the 6 year renewal proposal is reviewed/approved/awarded.
Projections as of Nov 16, 2023	*Dollars Projected for Month:*	44,581.44
	Actual Dollars Used:	41,398.92
	Variance (Projected minus Actual):	3,182.52
	Reason for Variance:	Variance primarily due to recharges being delayed and not properly charged to the project in October. 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	Oct, 2023 (HRS HOC)	Planning
Risk Level	Some Concerns	
Monthly Updates	During the month of October, - Jeannie participated in and scheduled meetings with the PI and budget analyst. - Team resumed bi-weekly meetings. - Due to disappointing NIOCCS matches, HRS is looking for 2 "ballpark" quotes for additional coding work: 1994-2002 waves (i.e., the ones that only have 1980 codes) - 25,434 And the 1994-2008 waves (i.e., the ones that only have 1980 or 2000 codes, but not the newest 2010 codes) - 41,089 -Coding is expected to be turned over to SRO by mid-late Dec. There is no expectation that the expanded coding effort should be completed in a specific time frame. -Michael Nolte and Qize Chen continue to run various iterations containing different methods of file cleaning, possibly impacting the final estimate of how many instances of occ/ind SRO will need to recode.	

Special Issues	- Work load for SSL Coding may significantly increase. - 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 and HRS approves the cost estimate.		
Cost as of Nov 16, 2023	*Total Cost to Date (direct + indirect):*		22,303.27
	Est Cost at Completion (E$AC):		86,666.71
	Total Budget:		92,157.06
	Variance (Total Budget minus- E$AC):		5,490.35
	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 Nov 16, 2023	*Dollars Projected for Month:*		10,162.61
	Actual Dollars Used:		676.87
	Variance (Projected minus Actual):		9,485.74
	Reason for Variance:	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 - 08/2024		
Data Col Period	03/2022 - 06/2024		
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	Oct, 2023 (HRS2022-Screening)	Implementing
Risk Level	Some Concerns	
Monthly Updates	The remainder of the Batch 5 sample was released to the field during the October training.	

We released 4,727 cases to the endgame protocol. 3,397 cases were finalized as final refusals (5000 series) or eligibility unknown (6000 series). About 10% of the cases flagged for endgame completed a screener. An additional ~800 cases have met the criteria for the end game protocol, have been mailed a letter, and can be attempted by interviewers. The end date for these ~800 cases is Dec. 13. We flag cases monthly that meet the endgame eligibility criteria. We have a weekly process that identifies cases that have gone through the end game protocol that need finalization.

Screening is going at a steady pace as the focus has been on baseline production. 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 sampling team is working on preparing the additional segments that will need to be sorted. 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 ultimately needed. We hope to be able to at least select the lower end of that soon to begin address sorting prior to the end of the year. We have identified a small set of resources that can start this work when it's ready.

Special Issues				
Cost as of Nov 15, 2023	**Total Cost to Date (direct + indirect):**			16,093,176.15
	Est Cost at Completion (E$AC):			27,883,255.40
	Total Budget:			28,919,242.00
	Variance (Total Budget minus- E$AC):			1,035,986.60
	Reason for Variance:	Projections are in the process of being updated.		
Projections as of Nov 15, 2023	**Dollars Projected for Month:**			1,314,162.66
	Actual Dollars Used:			968,469.27
	Variance (Projected minus Actual):			345,693.39
	Reason for Variance:	The largest contributors to the variance were due to unused staff hours, no large invoices from DataForce, spending less on travel, and unused respondent payments. These costs were pushed forward. The mobile device recharge, field operations, and CASIC recharges were delayed and were not properly charged in October. Those have been projected as additional costs in November.		

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	3,600/1,500 HHs	73%	3.0
	Goal at Completion:			
	Current Actual:	2,677/2,715	48.5%	2.70
	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	Oct, 2023 (IHDS3)	Implementing

Risk Level	On Track
Monthly Updates	This month has been mostly used close out Agencies 02,04 and 06. This is 63 out of the 294 total Agency/Data Model merges and Data out that need to be verified for final delivery. Additional work was done to prepare and release recent Migrant and Agency 13 data models for upcoming training and production.

Special Issues	Wave 3 funding balance ended at -$18,833.61 direct and indirect costs (-$12,072.53 Direct))	
Cost as of Nov 16, 2023	*Total Cost to Date (direct + indirect):*	616,942.85
	Est Cost at Completion (E$AC):	688,495.88
	Total Budget:	694,143.53
	Variance (Total Budget minus- E$AC):	5,647.65
	Reason for Variance:	TOTAL Budget is $134,259.00 . Not carrying forward certain amount of hours due additional funds that may be needed during closeout.
Projections as of Nov 16, 2023	*Dollars Projected for Month:*	16,750.67
	Actual Dollars Used:	13,964.00
	Variance (Projected minus Actual):	2,786.67
	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	Oct, 2023 (LHMS 2023 Fall)	Implementing
Risk Level	On Track	
Monthly Updates	Fall LHMS activities and notable events: 1- Initial SAQ mailing sent October 5 to 3,820 respondents. 2- Reviewed damaged checks from September to confirm none were missing 3- SAQs received and logged 4- Progress reports prepared and delivered to PIs	

5- SAQs shipped to DataForce for scanning
6- Project meetings and materials preparation for November reminder calling training

*Measures noted below based on data as of 11/14/23

Special Issues	- SSL resource availability for reminder calling and logging activities. - Budgeted goal of 54% seems high considering the sample consists of past wave non-responders and a few new spouses. The Spring LHMS, which also consisted of past wave non-responders, current response rate is 16%.		
Cost as of Nov 10, 2023	*Total Cost to Date (direct + indirect):*		280,196.97
	Est Cost at Completion (E$AC):		405,589.31
	Total Budget:		505,359.00
	Variance (Total Budget minus- E$AC):		99,769.69
	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 Nov 10, 2023	*Dollars Projected for Month:*		-63,503.48
	Actual Dollars Used:		13,312.91
	Variance (Projected minus Actual):		76,816.39
	Reason for Variance:	About $96,000 in voided checks were expected to be returned to the project, a large DataForce invoice, and CASIC and Field Ops Recharges did not hit in October. Future projections updated to account for these.	

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:			N/A
	Goal at Completion:	2063	54%	N/A
	Current Actual:	345	9%	N/A
	Estimate at Complete:	600	16%	N/A
	Variance:	1463	38%	N/A
Other Measures	N/A			

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	Oct, 2023 (LHMS 2023 Spring)	Implementing
Risk Level	On Track	
Monthly Updates	October Activities and Notable Events: 1 -Logging of returned SAQs 2- Weekly progress reports created and delivered to project stakeholders 3- Data delivery of completed scanned SAQs to PIs 4. 340 respondents have returned a completed a questionnaire (17% RR)	

Special Issues	None			
Cost as of Nov 10, 2023	*Total Cost to Date (direct + indirect):*			235,274.48
	Est Cost at Completion (E$AC):			269,574.66
	Total Budget:			457,922.00
	Variance (Total Budget minus- E$AC):			188,347.34
	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 Nov 10, 2023	*Dollars Projected for Month:*			32,546.49
	Actual Dollars Used:			10,364.23
	Variance (Projected minus Actual):			22,182.26
	Reason for Variance:	Over 10k in dataforce bills did not hit cost reports in October, over 10k in projected indirect costs unrealized. Future projections adjusted.		

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	1053	54%	N/A
	Goal at Completion:	1053	54%	N/A
	Current Actual:	340	17%	N/A
	Estimate at Complete:	350	18%	N/A
	Variance:	703	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**: 379,112.00	**Indirect Budget:** 98,569.00	**Total Budget:** 477,681.00
Principal Investigator/Clients			
Funding Agency	MDHHS - Releases 1 - 8		
IRB	**HUM#:** HUM00234617		**Period of Approval:** 6/15/2023-6/14/2028
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.		
	HUM00181068 - Year 3 IRB Exempt - Budget:$841,375 Total used:$649,836		
	HUM00234617 - Year 4 - IRB approved - Budget:$477,681		
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:** 06/01/2023
	Staffing Complete:	**GIT Start:**
	SS Train Start: 07/28/2023	**SS Train End:** 07/29/2023
	DC Start: 09/14/2023	**DC End:** 06/30/2023

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	Other (HSIP VISA Gift Card)
Payment Method	NA

Report Period	Oct, 2023 (MI CReSS (Year 3 & 4))	Implementing

Risk Level	On Track
Monthly Updates	Cohort 1 - In field & have met 80% target completion. Release 16 - 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 - Waiting for final approved translations for Arabic & Spanish. English only still in field
Special Issues	ORIO submitted in November for programming issue discovered in October. - Spanish and Arabic were not supposed to be available for Web Rs but were. We initially thought it was due to the language dropdown showing up in the Web program. That was fixe but still received a web Spanish complete and figured out it was due to their device's default language, which going forward we have forced everything to start in English.

Cost as of Oct 20, 2023	*Total Cost to Date (direct + indirect):*	45,446.00
	Est Cost at Completion (E$AC):	462,730.00
	Total Budget:	477,681.00
	Variance (Total Budget minus- E$AC):	14,951.00
	Reason for Variance:	Fewer hours billed to project than estimated

Projections as of Oct 20, 2023	*Dollars Projected for Month:*	66,823.00
	Actual Dollars Used:	45,446.00
	Variance (Projected minus Actual):	21,377.00
	Reason for Variance:	Fewer hours billed to project than estimated + $3,500 difference in TOA payments/Fringe + $4,500 indirect costs.

Measures		Units at Complete	RR	HPI
	Current Goal:	520	41%	3
	Goal at Completion:	2021	80%	3
	Current Actual:	520	41%	4.24
	Estimate at Complete:	2021	80%	4.4
	Variance:			1.4

Other Measures	Targeting 80% of eligible Rs that completed the Main survey to complete the MoCA section in CATI.

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	Oct, 2023 (MTF Base Year 2022_27)	Implementing
Risk Level	On Track	
Monthly Updates	October 2023 Since last month,..	

- actively working on updating training materials and agendas,
- SurveyTrak was updated with changes and testing has started,
- work to transition MTF to Qualtrics is on track and we have completed the first round of testing, 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 current plan for auto downloading data from Qualtrics relies on the continued use of SFTP - alternative methods are being explored.

Special Issues

Cost as of Nov 16, 2023	**Total Cost to Date (direct + indirect):**	1,730,253.94
	Est Cost at Completion (E$AC):	6,907,224.44
	Total Budget:	9,778,060.00
	Variance (Total Budget minus- E$AC):	2,870,835.56
	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 Nov 16, 2023	**Dollars Projected for Month:**	45,886.94
	Actual Dollars Used:	37,786.23
	Variance (Projected minus Actual):	8,100.71
	Reason for Variance:	Majority of the underspend was due to lower salary costs that projected.

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	Oct, 2023 (MTF Panel 2022-27)	Implementing
Risk Level	On Track	
Monthly Updates	1. Management - continued to work with the study team on implementing Qualtrics survey in 2024 production. 2. System - Started to prepare WSMS for 2024 production 3. Web Data Collection - Data collection ended on 10/24/2023 -Total Released Sample = 18727 -Total Completes = 9132 (48.71%), Partial completes = 469 (2.5%), SAQ completes = 1666 (8.9%) Overall, we did better than the last year (2022) data production. The positive outcome probably was result from sending reminders one week earlier than we did in 2022.	

4. Winter Location -N/A

5. NR Production/Calling-N/A
6. RLM: n/A

Special Issues		
Cost as of Oct 31, 2023	*Total Cost to Date (direct + indirect):*	1,189,449.24
	Est Cost at Completion (E$AC):	3,905,582.29
	Total Budget:	3,895,217.00
	Variance (Total Budget minus- E$AC):	-10,365.29
	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 Oct 31, 2023	*Dollars Projected for Month:*	29,343.78
	Actual Dollars Used:	18,383.23
	Variance (Projected minus Actual):	10,960.00
	Reason for Variance:	The total project amount includes MTF Web Illume as well as Non-Response Calling and Winter Location project. The overrun amount is MTF Panel 2022-2027 that was the combination of MTF Panel 2017-2022 and MTF Web Illume. Project team will revisit and streamline projections for future months. 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	Oct, 2023 (PR-PSID)	Implementing
Risk Level	Some Concerns	
Monthly Updates	SRO and ETI provided PIs with updated ballpark for NIA proposal resubmission in Nov. SRO worked with PIs to make additional questionnaire modifications and define protocols for PR. Will need to determine family listing protocols when there are multiple family units in the same housing unit for first wave data collection, but have simplified the protocol for the Pretest. Drafted training agenda and confirmed bilingual PSID Production Coordinator's availability to travel to PR for Pretest training. Worked with CDS to determine training dates that could work for both projects. Scheduled pretest	

training for 1/30-2/2. Training material development and translation underway.

Purchased an account with Speechify to explore using AI to generate voiceovers for training videos. The voiceovers are not perfect -- there are issues with pronunciation of the acronyms and technical names (Blaise, SurveyTrak).

IRB requested changes to the amendment on 10/16 due to a miscommunication about the Collaborating Organization Agreement. Received IRB approval on 10/25.

Scheduled recruitment training for 11/14. Recruitment survey was programmed in Qualtrics and tested by SRO and ETI.

SRO has created the base ghost image for the ETI laptops. Next step is to add any PR-PSID/ETI specific software. Blaise programming is in pretty good shape -- testing is finding less bugs and mostly making small corrections. More SurveyTrak testing is needed. WebTrak specs are still underway, programming has not yet begun.

Special Issues	Timeline concerns -- Timeline contingent on: training materials development and translation and systems testing. Slight overrun. Much of the Post Collection Processing that is planned is new for SRO.

Cost as of Nov 16, 2023		
	Total Cost to Date (direct + indirect):	465,016.85
	Est Cost at Completion (E$AC):	1,341,970.45
	Total Budget:	1,292,585.00
	Variance (Total Budget minus- E$AC):	-49,385.45
	Reason for Variance:	Projected cost to complete increased by ~14.6 between Sept & Oct. Main driver was adding hours for Weighting.

Projections as of Nov 16, 2023		
	Dollars Projected for Month:	51,824.75
	Actual Dollars Used:	44,586.78
	Variance (Projected minus Actual):	7,237.97
	Reason for Variance:	Programming actuals 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 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: Narine Verdiyan		
	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 - Kyle Goodman; Testing Coordinator - Camila Kendall; Project/Production Support - Jaime Koopman, Sarah Crane, & 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	Oct, 2023 (PSID TAS 2023)		Implementing
Risk Level	On Track		
Monthly Updates	Summary of October Activities Staffing and Training - In early October, 6 iwers and 4 TLs were trained and certified during study specific training that took place in person at the Perry building over 3, 5 hour days. -TLs had two additional half days of training specific to their role along with a focus on reporting (Report Portal and PQT) and technical systems (MAP). - Training preparations for an additional 23 interviewers have started. Training takes place in early December. Technical - All technical systems were ready for an on time launch of 50 cases on 10/3. The remainder of Rel 1 (n=1006)		

were invited on 10/5.
- During project testing, a couple of non-critical Blaise updates required a second DM. Blaise programming and testing on DM2 were completed with a promotion to prod on 10/18.
- Work on DM3 began, which will include a new identity confirmation question along with a U-M required ePayment routing changes that will now require an email.

Production
- Respondents are receiving sequenced (planned) system emails and iwer sent text messages. Message frequency is ~2X a week.
- Other current R protocols include: locating, assigned sample (respondents without a cell and email), and suspend follow up.

Management
- Submitted an IRB amendment for New Year's communications.
- The project management team pivoted certain tasks due to a change in the production management team. Worked on finding additional staff to help fill holes due to the loss is ongoing.

Special Issues		
Cost as of Nov 16, 2023	**Total Cost to Date (direct + indirect):**	326,693.16
	Est Cost at Completion (E$AC):	1,377,391.85
	Total Budget:	1,457,428.00
	Variance (Total Budget minus- E$AC):	80,036.15
	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 Nov 16, 2023	**Dollars Projected for Month:**	175,611.00
	Actual Dollars Used:	98,151.71
	Variance (Projected minus Actual):	77,459.29
	Reason for Variance:	Actuals in tech, management, and recharge categories were lower than projections.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:			
	Goal at Completion:		89%	
	Current Actual:	580	54.9%	.6
	Estimate at Complete:			3.7
	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	Oct, 2023 (PSID23)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Summary of October 2023 Activities		

Spanish / Blaise:
Promoted Data Model 3 to the production project on 10/4, which includes Spanish web. Preparing fourth Blaise data model to address university-required electronic payment changes.

Launched Spanish web on 10/9. Launched Spanish Web Special Offer on 10/26 – an additional $20 token if the interview is completed by 11/15. Spanish web uptick rate is much lower than English web – hoping WSO will increase Spanish web participation. Developing Spanish web translation observations for translating open ends (similar to what interviewers complete in the Spanish CATI obs).

Investigating increased interview length web compared to CATI, as well as this wave compared to last wave. Focus of investigation on removing idle time (can be identified with timeout warning message) and on understanding time between pages.

End Game / Roadrunner Experiment:
Roadrunner Treatment End Game on-going 9/20 – 11/1. Increased incentive from $150 to $200 on 10/11 – two-phased EG incentive increase new this wave. Following standard EG contact protocols.

Preparing for English CATI and remaining sample End Games to launch in November.

Saliva Training / Production:
Held SSL Logging Training on 10/16. Held additional field interviewer Saliva Follow-up Training on 10/18 and 10/19.

Working on saliva-related reports, troubleshooting saliva production issues, and finalizing saliva code out procedures.

Production / DCA:
Promoted new short text messages tab in DCA on 10/26. Also distributed short message templates for use with interviewer-initiated emails and postcards.

Staffing:
Offered field interviewer bonus from 10/15 - 10/28. Wanted to recognize field's efforts and emphasize weekend hours.

Proposals / PSID25:
Delivered Core 2025-2027 proposal on 10/23 and approved by PIs. Development of supplemental proposals on-going.

With the goal of increasing interviewer/management efficiency in order to make the proposed 2025 budget obtainable, created a prioritized list of key tech development items (across MSMS Core, MSMS Project, and non-MSMS) and suggested operational changes. Will present to PIs and James Wagner on 11/1.

Confirming 2025 regular staff assignments.

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 Nov 17, 2023	*Total Cost to Date (direct + indirect):*		3,740,033.71
	Est Cost at Completion (E$AC):		6,196,695.66
	Total Budget:		6,235,802.00
	Variance (Total Budget minus- E$AC):		39,106.34
	Reason for Variance:	Still reviewing October CRS but cost values reflect 11/17/23 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 Nov 17, 2023	*Dollars Projected for Month:*		425,281.35
	Actual Dollars Used:		330,283.77
	Variance (Projected minus Actual):		94,997.58
	Reason for Variance:	Still reviewing October CRS but cost values reflect 11/17/23 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:	7084	67%	5.0
	Estimate at Complete:	8956	85%	5.73
	Variance:	690	4%	0.85

Other Measures

Notes for Measures Above:
From Dashboard through 10/28/23. Units Completed = 7084 iws (1534 CATI--22%, 5544 web--78%). Sample Invited = 10,708.

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.

BUDGET ASSUMPTIONS:

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	Oct, 2023 (QoL & Hearing Loss)	Closing
Risk Level	On Track	
Monthly Updates	Margaret Hudson met with the PI team to consult/review the current questionnaire for questions to remove/change to pilot with families of younger children (age 2-6). Based on the discussion, Margaret will make adjustments to the tool in November for the team to pilot at the December 6, 2023 clinic.	
Special Issues		
Cost as of	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	8,200.00
	Variance (Total Budget minus- E$AC):	0.00
	Reason for Variance:	
Projections as of	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	0.00
	Variance (Projected minus Actual):	0.00
	Reason for Variance:	

Measures

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

Other Measures

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

Project Name	**(SAME) Skills Assessments Mode Evaluation Study (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	Oct, 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.
	- Implemented one-time TOA to eligible families.
	- Prepared survey hardware closeout activities.
	Technical System Development and Testing/Training:
	- Worked with Tech staff to change the wash-out days from 14 to 7 days between modes on the last few sample lines.
	- WJ scoring team are preparing the assessments for scoring process.
	Interviewer Hiring & Training
	- Collecting interviewer debriefing notes
	Production: Completed production successfully on 10/19/2023
	-We recruited a total eligible kids - 139 (recruited 141 but 2 coded out) among 89 families
	- Production Stats: as of 10/31/23 - total 249 completes, RR 89%
	- Remote IW completed: 124 (RR 89%)
	- FtF IW completed: 125 (RR 90%)
	- Hardware:
	- total tablets: 20, lost 1
	- total headsets: 20, damaged: 2
	- Other: PM is working with DCS to prepare field staff closeout activities.

Special Issues

Cost as of Oct 31, 2023	**Total Cost to Date (direct + indirect):**		278,984.17
	Est Cost at Completion (E$AC):		298,699.40
	Total Budget:		302,327.00
	Variance (Total Budget minus- E$AC):		3,627.60
	Reason for Variance:	The underrun amount was caused by readjusting the estimated projections across the board to Dec 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 and some missing non-salary costs that will be reflected in November cost report.	
Projections as of Oct 31, 2023	**Dollars Projected for Month:**		43,090.90
	Actual Dollars Used:		33,433.56
	Variance (Projected minus Actual):		9,657.34
	Reason for Variance:	The small amount of underrun was mainly due to decreased iwers' hours and travel costs as well as less respondent incentives than expected in November.	

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	Oct, 2023 (SCA 2023)	Initiation
Risk Level	On Track	
Monthly Updates	SCA October 2023 began as scheduled on WED 9/27/23 and ended as scheduled on SUN 10/22/23. We completed 605 IWs for the month (326/174/105) 5 IWs ahead of goal (600:320/180/100), at 3.17 HPI (.03 below the budgeted goal of 3.2 and .17 above our target goal of 3.0).	
Special Issues		

Cost as of Nov 16, 2023	*Total Cost to Date (direct + indirect):*	1,026,740.83
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	1,332,352.00
	Variance (Total Budget minus- E$AC):	0.00
	Reason for Variance:	Projected underrun for CY 2023 overall is primarily due to a lower than budgeted HPI as well as lower than budgeted Interviewer 2 hours.

Projections as of Nov 16, 2023	**Dollars Projected for Month:**			114,105.73
	Actual Dollars Used:			97,285.07
	Variance (Projected minus Actual):			16,820.66
	Reason for Variance:	Some recharges were not charged in October; we projected the missed October recharges will hit in November.		

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	600		3.0
	Goal at Completion:	600		3.0
	Current Actual:			
	Estimate at Complete:	605		3.17
	Variance:			.17

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	Oct, 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 11/20/2023, the project has only completed 434 interviews, compared to roughly 1963 expected interviews for the same time period. The project has finalized 1599 screener lines compared to about roughly 3500 expected for the same time period. The production deficit is related to having fewer interviewers than needed and higher hours per screen than budgeted. The interview length is 120 minutes (compared to 140 budgeted) and saliva cooperation is around 85% (slightly higher than budgeted). Screening continues to be very difficult, with some areas being very hostile to minority interviewers (or to any interviewers). We reprinted respondent materials for SRS so that no Arabic is shown, in response to objections	

from households. We are still awaiting IRB approval for some other updates to materials.

We presented the financial and production status to the PIs in September and again in early November, 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).

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. An increase in the token of appreciation to $100 was rolled out on October 26, in time for a new sample release on November 1. Interviewers reported that there was more interest now that the token has been increased, and it does look like overall HPI (including screening) has come down by about 10 hours per interview since the new sample (and higher token) were released.

English concerns letters were approved and are being used in the field. A new prenotification letter is still awaiting IRB approval, as is a new study brochure.

We will train 9 on-staff interviewers for the DAWN projects in early December – they will begin working in the field December 8. Four of the interviewers will be local, and 5 will be travelers. We hope this will help address the deficit of interviewer hours for SRS. The project has experienced extreme attrition both before and after new hire training. The project is not getting sufficient hours to complete the study on time.

Special Issues	NOTE: Cost reports were not updated in time for MPR submission. 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 very high HPI. This has been communicated to the PIs in weekly meetings as well as in the monthly written reports. We have asked the PIs for input on how much panel sample to release, given the lower expected number of newly-screened sample cases. They have not responded to two inquiries about releasing panel sample. 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 Nov 21, 2023		
	Total Cost to Date (direct + indirect):	1,756,536.74
	Est Cost at Completion (E$AC):	5,874,981.10
	Total Budget:	5,876,610.11
	Variance (Total Budget minus- E$AC):	1,629.01
	Reason for Variance:	We are projecting that the entire budget will be used for data collection. We are not projecting an overrun. We are assuming that the work scope will be decreased to match the budget available.
Projections as of Nov 21, 2023	*Dollars Projected for Month:*	384,788.59
	Actual Dollars Used:	183,297.70
	Variance (Projected minus Actual):	201,490.89
	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 attempting to adjust projections to be more in line with production expectations and the lower number of interviews expected.

Measures		Units at Complete	RR	HPI
	Current Goal:	3644	88% scr, 75% main	10.4 with screening
	Goal at Completion:			
	Current Actual:	434	25% scr, 47% main	19.7 with screening
	Estimate at Complete:			
	Variance:			
Other Measures	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	Oct, 2023 (STARRS-LS VA HEARTH)	Implementing
Risk Level	Some Concerns	
Monthly Updates	• The first two interviews were conducted on October 7. As of November 4, 150 email invitations have been sent, with 26 people indicating interest in participation (17.3%) and 7 scheduled and 9 completed (10.7%). Assuming interviewer availability supports it, we estimate completing approximately 60-65 interviews (original goal: 100). • We began processing respondent payments ($50) as token of appreciation via Tango electronic gift card. • The HEARTH team (Katie, Jenny and the student interviewers) requested information about the reasoning for the redaction and from whom we are trying to protect the Veterans from being identified. They noted they were committed to following protocols but were just more curious to understand the reasoning behind it. • U-M provided a response with examples of why/how redaction of potentially identifying information is important, discussed that we are protecting the Veterans from being identified from anyone outside of the immediate U-M SRO data collection team, our promises to Rs and in our IRB to protect Rs' privacy and confidentiality, data handling best practices, safeguards in place, and the possible consequences of a data/confidentiality breach. • We worked on new strategies for obtaining schedules from the students and displaying these in the calendaring system as appointment slots for respondents to choose. The students have very busy schedules and limited availability for interviewing; we wish to maximize the available time slots in which interviews can take place. • After the first few interviews were completed, the students found the transcript redaction process very time consuming. Ron, Nancy, Katie Koh, Jenny D'Olympia, James, Margaret and Meredith met on November 3 to discuss. We suggested U-M do the redaction. We are already doing a QC step and the process should become pretty efficient using a systematic approach. This will allow the students to focus their time on interviewing. • The U-M HEARTH budget was set up with only a nominal number of hours for the student interviewers with the understanding they were receiving compensation through other means. Shifting their U-M work to focus only to interviewing should mean the budgeted hours will be sufficient to support their U-M-related work.	

Special Issues		
Cost as of Nov 16, 2023	Total Cost to Date (direct + indirect):	16,461.34
	Est Cost at Completion (E$AC):	72,870.33
	Total Budget:	89,942.00
	Variance (Total Budget minus- E$AC):	17,071.67
	Reason for Variance:	Production is moving more slowly than anticipated; we will not reach the original goal of 100 completed IWs by the end of the sub-contract.
Projections as of Nov 16, 2023	Dollars Projected for Month:	11,842.41
	Actual Dollars Used:	6,629.81
	Variance (Projected minus Actual):	5,212.60
	Reason for Variance:	Fewer interviews were completed this month than projected, reducing staff time and incentives paid.

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**: 8,262,557.60	**Indirect Budget:** 4,627,032.00	**Total Budget:** 12,889,590.00
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:* 4/5/23 - 4/4/24
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	Oct, 2023 (STARRS-LS Waves 3 & 4)	Initiation
Risk Level	On Track	
Monthly Updates	BLUF:	

BLUF:
? 11 of 14 replicates have been released with 11,705 sample lines. As of November 6, 2023, we have completed 8,113 interviews (7,648 web; 465 phone).
? The response rate for completed replicates (Reps 1-9) is 75.5%.
? We continued the process of identifying hours and charges that need to be moved from the Year 3 to the Year 4 accounts.
? Year 5 budget
o We worked on producing a Year 5 budget that assumes we start Wave 5 during that budget year, as well as a total ballpark budget for all of Wave 5.
? IRB:
o The USUHS IRB acknowledged one remaining ORIO on September 13.
? STARRS-affiliated, but not STARRS funded, work:
o VA/HEARTH project:
? As of November 4, nine interviews had been completed and seven more had been scheduled.
? Per the HEARTH team's request, U-M provided information about the reasoning for the redaction and from whom we are trying to protect the Veterans from being identified.
? We worked on new strategies for obtaining schedules from the students and displaying these in the calendaring system as appointment slots for respondents to choose.
? U-M will take on the transcript redaction because the student interviewers found it to be too time-consuming. This should free them up to do more interviews.
? The interviewer hours in the U-M HEARTH budget should be sufficient now that the students are only charging for the interviewing (not redaction).
? Harvard worked with U-M to test access to the HEARTH drop box. Access was confirmed.
? The team began planning for the annual DoD security training to be carried out in November/December.
? Annual IA security review: we learned M&RA is discussing a possible site visit for the last two weeks of January.
? 2023 repeat NDI search:
o The team continued work on the NDI file processing. The adjudication file was made available for review.
? Work continued to configure a new Windows database server to replace a server version that reached end of life in October 2023. Additional support was purchased to ensure ongoing protection/support while the final configuration continues.
? The Enclave onboarding process continued for two VA fellows and three new Harvard analysts.
? We tracked progress on three new DUAs for obtaining or retaining Enclave and/or Great Lakes Cluster access that were in process at USUHS/HJF
? Public Use:
o Wave 3 data was released on October 19.
o The team continued work on the biosample flags and administrative data tables.

Activities for October 2023 include:

Project Management and Planning:
? 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 We continued the process of identifying 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.
? Year 5 budget:
o We worked on producing a Year 5 budget which includes work on Wave 5. The budget assumes we start W5 preproduction April 2024 and production November 2024 (2 years after Wave 4). We also worked on producing a total ballpark budget (marginal cost) for all of Wave 5. Marginal because some costs are already budgeted in the existing Year 5 (e.g., Enclave and Management through April 2025).

? IRB:
o USUHS acknowledgement for the ORIO for the Replicate 9 letter that was mistakenly mailed to a respondent who withdrew from the study in Wave 3 was issued on September 13.
? STARRS-affiliated, but not STARRS funded, work:
o VA/HEARTH project:
? The first two interviews were conducted on October 7. As of November 4, nine interviews had been completed and seven more had been scheduled.
• HEARTH respondents who complete interviews are emailed a $50 token of appreciation via Tango electronic gift card.
? The HEARTH team (Katie, Jenny and the student interviewers) requested information about the reasoning for the redaction and from whom we are trying to protect the Veterans from being identified. They noted they were committed to following protocols but were just more curious to understand the reasoning behind it.
• U-M provided a response with examples of why/how redaction of potentially identifying information is important, discussed that we are protecting the Veterans from being identified from anyone outside of the immediate U-M SRO data collection team, our promises to Rs and in our IRB to protect Rs' privacy and confidentiality, data handling best practices, safeguards in place, and the possible consequences of a data/confidentiality breach.
? We worked on new strategies for obtaining schedules from the students and displaying these in the calendaring system as appointment slots for respondents to choose. The students have very busy schedules and limited availability for interviewing; we wish to maximize the available time slots in which interviews can take place.
? After the first few interviews were completed, the students found the transcript redaction process very time consuming. Ron, Nancy, Katie Koh, Jenny D'Olympia, James, Margaret and Meredith met on November 3 to discuss. We suggested U-M do the redaction. We are already doing a QC step and the process should become

pretty efficient using a systematic approach. This will allow the students to focus their time on interviewing.
? The U-M HEARTH budget was set up with only a nominal number of hours for the student interviewers with the understanding they were receiving compensation through other means. Shifting their U-M work to focus only to interviewing should mean the budgeted hours will be sufficient to support their U-M-related work.

Enclave and User Support:
? Harvard worked with U-M to test access to the HEARTH drop box. Access was confirmed.
? Annual DoD security training:
o The team began planning for the renewal training to be carried out in November/December.
? Annual IA security review:
o We learned M&RA is discussing a possible site visit for the last two weeks of January.
? 2023 repeat NDI search:
o The team continued work on the NDI file processing. The adjudication file was made available for review. 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 Work continued on configuration of a new Windows database server to replace a server version that reached end of life in October 2023. Additional support was purchased to ensure ongoing protection/support while the final configuration continues.
o The Enclave onboarding process continued for two VA fellows and three new Harvard analysts.
o We tracked progress on three new DUAs for obtaining or retaining Enclave and/or Great Lakes Cluster access that were in process at USUHS/HJF:
? Analyst moving from working under the U South Carolina subcontract to Cornell. DUA now on hold; Cornell asked analyst to submit an IRB protocol and gain approval.
? Two VA fellows – one working with USUHS, the other with Harvard. DUAs in process.

Public Use Data:
? Wave 3:
o ICPSR released the LSW3 data on October 19. In addition to releasing the LSW3 dataset, the SRO and ICPSR teams updated related study documentation including the STARRS Respondent Crosswalk and the User Guide. Dataset 3, Master Respondent ID Linkage Table, was also updated. U-M notified USUHS on October 20.
? Biosample flags, administrative variables, and inventory document:
o The team continued work on the biosample flags and administrative data tables. A transfer memo for moving the admin data off the Enclave to a secure, internal U-M server for ICPSR processing was circulated to the PIs and approval was provided.
o We are targeting June 1 for the biosample flags and administrative data 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 November 6, 2023, are as follows:
o Replicates released: 11 of 14 released with 11,705 sample lines.
o Completed interviews: 8,113 (7,648 web; 465 phone).
o Replicate 9 ended production on October 23 with a final response rate of 75.7%, which is just slightly above the wave average.
? Replicate 9 was the most productive replicate thus far in Wave 4 for our interviewers, who completed 59 interviews.
o In October, Replicate 10 transitioned from Phase 2 to Phase 3. As of November 6, it had entered Phase 4. The response rate was 59.2% and tracking about 3 percentage points below the average rate.
? We observed lower email open rates for the Microsoft email services (Hotmail, Outlook, and MSN) which is likely contributing to the slightly lower response rate. Note that we did not observe higher bounced or blocked email rates for the MS email domains, only lower email open rates.
? The team has not come to any definitive conclusions, but we continue to explore. Our emailing protocol has not changed. Email service providers use algorithms to determine how to handle email messages. We may simply be observing a shift in Microsoft email services' underlying algorithm.
? Microsoft domains represent only about 8% of all respondent email addresses. Gmail.com, yahoo.com and military emails are the vast majority.
o Replicate 11 launched on October 23 and moved to Phase 2 one week later. The response rate was 27.8% and also tracking about 3 percentage points below the average rate for this point in the protocol. Replicate 11 looks to be following the trajectory of Replicate 10.
o The response rate for completed replicates (Reps 1-9) is 75.5%.

Safety Plan Results:
The Wave 4 Safety Plan rate is 12.1% as of November 6.

Special Issues		
Cost as of Sep 30, 2023	*Total Cost to Date (direct + indirect):*	9,051,654.81
	Est Cost at Completion (E$AC):	12,611,266.56
	Total Budget:	12,889,590.00
	Variance (Total Budget minus- E$AC):	278,323.44
	Reason for Variance:	1. ORSP allocated the $80,200 from the biosample flags/admin data/inventory document public use budget to the Year 4 award and Bill added the amount to CRS. Our 5 year budget amount is now $12,889,590. 2. A full projections review and updates were completed and included: a. Adding hours for SRO and ICPSR to complete the biosample flag-related work. This added roughly the budgeted amount of $80K to the projections. b. Removal of projected hours for core STARRS data collection component staff in Year 5 for project close-out, reporting, documentation, i.e., hours that were in place if Wave 4 were the final

wave and we were to close down production. These hours will be replaced with Wave 5 hours for pre-production and the first four months of production, which overlap with Year 5. Note that all of the overlap was not removed. We retained additional hours for normal Wave 4 close-down activities that overlap with Wave 5 start-up activities. We also retained 384 hours (of varying values) of cushion. (Documentation is located at - L:\projects\A-STARRS LS Wave 4\01_Management\Budget and Cost Monitoring\2023_10\ Consolidate Year 5 Hours_Wave 5 Hours.xlsx)

c. Removal of some regular staff generic line contingency hours in Year 5 for unknown scope.

d. We retained cushion in the following areas:

i. 384 hours [of varying value] noted in 2.b.

ii. 100 SurveyTech I hours and 75 SurveyTech II hours. [$3.8k direct]

iii. Travel costs [$16k direct]

iv. Enclave non-salary [$7-8k direct]

v. Interviewer, training support, and help desk support hours, and non-salary costs for an attrition training [$15K direct]. Regular staff are also fully covered in the unlikely event a Wave 4 attrition training is needed.

e. Our new projected underrun, before adding in the costs for Wave 5 is $278,323.44.

Projections as of Sep 30, 2023	Dollars Projected for Month:		299,066.59
	Actual Dollars Used:		275,661.95
	Variance (Projected minus Actual):		23,404.64
	Reason for Variance:	Underspending in September was largely in Main Data Collection - Rpay and SurveyTech hours. Before projections updates, the overall cost report showed a projected deficit of $41,500 – the increase rom last month was due to annual salary increases above the 3% inflation increase.	

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

Other Measures

Developmental/Initiative Projects Dashboard

NonArchived Development Initiative and No-DataCol Projects

Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
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	Planning	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	Oct, 2023 (TSME24 DCO System Support (483248))	Implementing
Risk Level	Some Concerns	
Monthly Updates	The API connections for our new ATS has been delayed due to production demands. These costs will hit in Dec and Jan. Met with PIPPA team to touch base on the Plan of PIPPA -> Fred integartion. Hueichun and Vivienne met to discuss to details on Fred side as related to PIPPA. DCO and Hueichun/Max met to kick off FOTY 2024 planning and testing. Hueichun started to investigate TeamTailor API library and tried out the API Token/Key and the correct API Root domain.	

Special Issues		
Cost as of Nov 07, 2023	*Total Cost to Date (direct + indirect):*	6,572.67
	Est Cost at Completion (E$AC):	32,254.75
	Total Budget:	35,000.00
	Variance (Total Budget minus- E$AC):	2,745.25
	Reason for Variance: ATS implementation delayed	
Projections as of Nov 07, 2023	*Dollars Projected for Month:*	3,210.26

			Actual Dollars Used:			502.65
			Variance (Projected minus Actual):			2,707.61
			Reason for Variance:	ATS implementation delayed		

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	Oct, 2023 (TSME24 MSMS Working Group (425197))	Implementing
Risk Level	On Track	
Monthly Updates	3rd meeting of Data Standards group rescheduled to early Nov. Kelly is working on the MSMS Documentation Site navigation. Met with SRO Admin and selected a new topic of Help Desk Support to spin up next ad hoc working group.	
Special Issues		
Cost as of Nov 16, 2023	*Total Cost to Date (direct + indirect):*	1,146.23
	Est Cost at Completion (E$AC):	12,154.71
	Total Budget:	15,000.00
	Variance (Total Budget minus- E$AC):	2,845.29
	Reason for Variance: Members not charging the short code.	
Projections as of Nov 16, 2023	*Dollars Projected for Month:*	1,376.06
	Actual Dollars Used:	560.03
	Variance (Projected minus Actual):	816.03
	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

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

Other Measures

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	Oct, 2023 (TSME24 QC Systems (483249))	Implementing
Risk Level	On Track	
Monthly Updates	First version of QC dashboard and shared with the QC Implementation team for review. Reports were reviewed and those that did not work were hidden. Other fixes, due to MSMS changes in instrument set up, were implemented to get active reports to work properly. Rest of the hours were used for meetings.	
Special Issues		
Cost as of Nov 16, 2023	*Total Cost to Date (direct + indirect):*	4,981.67
	Est Cost at Completion (E$AC):	48,805.23
	Total Budget:	49,500.00
	Variance (Total Budget minus- E$AC):	694.77
	Reason for Variance: minimal cost variance	
Projections as of Nov 16, 2023	*Dollars Projected for Month:*	2,534.02
	Actual Dollars Used:	2,242.69
	Variance (Projected minus Actual):	291.33
	Reason for Variance: Resource availability is mostly responsible to spend these dollars.	

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:			

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	Oct, 2023 (TSME24 SSL Autoscheduler	Implementing
Risk Level	On Track	
Monthly Updates	We are continuing to meet and continue to confirm timelines and expectations. Current plan is to complete Phase I of the Auto Scheduler interface by January/February 2024. Generally on track.	
Special Issues		
Cost as of Nov 15, 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 Nov 15, 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:			

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	Oct, 2023 (TSME24 STrak: Migration to SQL Anywhere V17 ()		Planning
Risk Level	On Track		
Monthly Updates	Continuing setup		
Special Issues			
Cost as of Nov 15, 2023	*Total Cost to Date (direct + indirect):*		506.54
	Est Cost at Completion (E$AC):		22,516.94
	Total Budget:		10.00
	Variance (Total Budget minus- E$AC):		7,483.06
	Reason for Variance:		
Projections as of Nov 15, 2023	*Dollars Projected for Month:*		2,751.30
	Actual Dollars Used:		158.72
	Variance (Projected minus Actual):		2,592.58
	Reason for Variance:		

Measures

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

Other Measures

Measures

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

Other Measures