
Survey Research Operations

Monthly Project Report

Sponsored Data Collection Projects and Development Initiative

December 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
(EDC-Endline) Every Dollar Counts Endline
(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 Early Panel Pilot) Monitoring the Future: A Cohort-Sequential Panel Study of Drug Use, Ages 19-65 - Administrative Supplement #1 (8/10th Grade Panel)
(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027
(PR-PSID) Puerto Rico Panel Study of Income Dynamics
(PSID TAS 2023) Transition to Adulthood within its Life Course & Intergenerational Family Context
(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 SRO System Maintenance - General (483910)) TSME24 SRO System Maintenance - General (483910)
(TSME24 SSL Autoscheduler interface development (42) TSME24 SSL Autoscheduler interface development (423463)
(TSME24 STrak: Migration to SQL Anywhere V17 () TSME24 STrak: Migration to SQL Anywhere V17 (483227)

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 End: Staffing Complete: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: 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	Dec, 2023 (ANES 2024)		Implementing
Risk Level	On Track		
Monthly Updates	We are in the process of determining the best way to move forward with data entry. Andrew has asked TSG how much effort for a program to do data entry. He will also investigate Qualtrics as an option.		
	This monthly report will switch over to the main ANES when reporting on January. I'll include any relevant updates on the pilot as part of that.		
Special Issues			
Cost as of Jan 12, 2024	Total Cost to Date (direct + indirect):		180,074.75
	Est Cost at Completion (E\$AC):		195,477.43
	Total Budget:		7,024,812.00

Variance (Total Budget minus- E\$AC):

16,421.57

Reason for Variance:

Need to update projections to reflect data entry of paper questionnaires. Waiting on a programming estimate before deciding on how to proceed.

Projections as of Jan 12, 2024 Dollars Projected for Month:

14,341.14

Actual Dollars Used:

-1,864.11

Variance (Projected minus Actual):

16,205.25

Reason for Variance:

Unused projections will be moved forward. Funds for incentives were returned from Tango.

Measures		Units at Complete	RR	HPI
	Current Goal:	200/160		
	Goal at Completion:			
	Current Actual:	151/53		
	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	<div> <div>Pre Production Start:</div> <div>Pretest End:</div> <div>Staffing Complete:</div> <div>SS Train Start:</div> <div>DC Start:</div> </div> <div> <div>Pretest Start:</div> <div>Recruitment Start:</div> <div>GIT Start:</div> <div>SS Train End:</div> <div>DC End:</div> </div>		
Other Project Team Members			
Other Project Name	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	Dec, 2023 (BHM Library Project)		Implementing
Risk Level	Some Concerns		
Monthly Updates	January mailing planned.		
Special Issues	No new special issues.		
Cost as of Jan 18, 2024	Total Cost to Date (direct + indirect):	53,532.26	
	Est Cost at Completion (E\$AC):	179,112.05	
	Total Budget:	197,671.00	
	Variance (Total Budget minus- E\$AC):	18,558.95	
	Reason for Variance:	None	
Projections as of Jan 18, 2024	Dollars Projected for Month:	19,362.42	
	Actual Dollars Used:	7,925.80	

Reason for Variance: Have not asked TSG to step in on programming or DMSS to start on Pilot analysis. We are extending the Pilot response period by including a mailing.

Measures		Units at Complete	RR	HPI
	Current Goal:		30%	
	Goal at Completion:			
	Current Actual:		18%	
	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	David Weir		
Investigator/Clients			
Funding Agency			
IRB	HUM#: HUM00079949		Period of Approval: 11/4/2022-11/3/2023
Project Team	Project Lead: Gloria J Baker		
	Budget Analyst: Cindy Tsao		
	Production Manager:		
	Senior Project Advisor: Evanthia Leissou		
	Production Manager 1: Jennifer C Arrieta		
	Production Manager 2:		
Proposal #	no data		
Description	CAMS is part of the Health and Retirement Study (HRS). The goal of CAMS is to gather additional data on household consumption and activities of daily living from participants in the HRS. In 2023, a paper questionnaire will be mailed to approximately 6,427 respondents of which 4,646 will receive the full questionnaire and 1,781 spouse/partners will receive a brief questionnaire.		
SRO Project Period	06/2023 - 05/2023		
Data Col Period	09/2023 - 04/2005		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 06/26/2023</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start: 10/04/2023</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End: 04/30/2024</div></div>		
Other Project Team Members	HRS Budget Analyst: Rick Krause Data Manager: Ed Green, Jennie Williams Programmer: Ashwin Dey Project Assistant: Melissa Luker		
Other Project Name	CAMS		
Sample Mgmt System	SurveyTrak		
Data Col Tool	SAQ		
Hardware	Paper and Pencil		
DE Software	Other (HRS study staff is responsible for)		
QC Recording Tool	N/A		
Incentive	Yes, R; Yes, Other (Spouse)		
Administration	SRO Group		
Payment Type	Check, prepaid (\$25 to main R and \$10 to spouse R)		
Payment Method	Check through STrak RPay System		

Report Period	Dec, 2023 (CAMS 2023)		Implementing
Risk Level	On Track		
Monthly Updates	During the month of December, the team worked on logging, shipping, and the final mailing dropped on December 4. There are no further mailings other than thank you postcards. 2. Logging issues smoothed out by the end of November with the addition of a Manpower temp assigned by the SSL to log for CAMS. December logging went well. Note The consistent hours and focus primarily on CAMS has had a positive impact on logging progress and cut down on the need for constant retraining and corrections. 3. 4,046 CAMS lines have been finalized of which 3,528 have completed the questionnaire. The current response rate is 56%. 4. QC and shipping is completely caught up.		
Special Issues	Due to an sample address error, 2nd address lines were omitted on about 500 priority mail envelopes (4th mailing). If these are returned, they will be mailed out via USPS. We expect to incur additional USPS costs associated with this error. Update: 156 remails were sent from final mailing to Jan 19.		
Cost as of Jan 18, 2024	Total Cost to Date (direct + indirect):		392,886.28
	Est Cost at Completion (E\$AC):		371,879.65

Total Budget:	473,136.00
Variance (Total Budget minus- E\$AC):	101,256.35
Reason for Variance:	The variance is primarily due to staff assigned to the project compared to budgeted resources.
Projections as of Jan 18, 2024 Dollars Projected for Month:	91,281.04
Actual Dollars Used:	70,226.10
Variance (Projected minus Actual):	21,054.94
Reason for Variance:	We over projected the number of hours for Survey Tech II. We projected 129 hours but only 8 were worked. However, billing for Manpower has not been applied yet. We also overprojected a few non-salary items, most notably postage and DataForce.

Measures		Units at Complete	RR	HPI
	Current Goal:	3,727	58%	
	Goal at Completion:	3,470	59%	
	Current Actual:	3,526	56%	
	Estimate at Complete:	3,740	57%	
	Variance:	0	2%	

Other Measures

Project Name	(Care & Help Study) Caregiving, Complex Family and Kinship Ties, and Alzheimer's Disease and Related Dementias (ARD) (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 (ARD) who require more intensive and persistent care over time, and thusly rely on a more extended network of caregivers. This project seeks to enhance our understanding of diverse family and unpaid caregiver experiences and how this process may differ for those caring for an older adult living with dementia. This project will conduct focus groups with two groups of caregivers who help someone with memory issues, with 8 to 10 participants each.		
SRO Project Period	07/2023 - 07/2024		
Data Col Period	07/2023 - 07/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Focus group phase (7/23-10/23): Margaret Hudson Cog IW phase (1/24-6/24): Margaret Hudson, TBD		
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Cash, post (\$60 focus groups; \$50 cognitive interview)		
Payment Method	Imprest Cash Fund from ISR Business Office		

Report Period	Dec, 2023 (Care & Help Study)		Implementing
Risk Level	On Track		
Monthly Updates	<p>Supplemental/"booster" funding was awarded by MiCDA (Michigan Center on the Demography of Aging) to add 4 focus groups. This month the PI and Margaret determined a timeline for the new focus groups, which will be conducted on three Sundays and one weekday evening in late January and early February 2024. The PI will be handling recruitment for the focus groups, to start in late December/early January. Margaret reserved space for the focus groups in preparation.</p> <p>Additionally this month a resource was identified to assist with the next phase of the project conducting cognitive interviews in late winter/spring 2024. Lisa Van Havermaet will to teaming with Margaret for this work. The full timeline for the cognitive interviews will be firmed up after focus groups are completed.</p>		
Special Issues			

Cost as of Jan 18, 2024	Total Cost to Date (direct + indirect):	2,599.64
	Est Cost at Completion (E\$AC):	22,093.04
	Total Budget:	27,236.00
	Variance (Total Budget minus- E\$AC):	5,142.96
	Reason for Variance:	

Projections as of Jan 18, 2024	Dollars Projected for Month:	579.23
	Actual Dollars Used:	65.99
	Variance (Projected minus Actual):	513.24
	Reason for Variance:	minimal effort this month as planning is largely move to January.

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: David Kellermeyer Production Manager: Barbara Aghababian-Homburg Senior Project Advisor: Barbara Lohr Ward Production Manager 1: Hongyu Johnson Production Manager 2: Keith Liebetreu		
Proposal #	no data		
Description	<p>The project follows academy cadets post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure.</p> <p>This project has an overall SRO involvement period of 13 months, beginning March 2022, with data collection taking place over approximately 12 months starting mid-March 2022. SRO provides consultation, respondent locating activities and data collection for respondents in the uniformed services sample.</p> <p>The goal is to secure participation from approximately 3,200 unique past-CARE study participants. Participants will complete a study assessment once over the 13-month project period. SRO decentralized field interviewers locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct approximately 1,425 telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.</p> <p>The estimate total cost for the overall scope of work is \$1,426,001.00. This includes \$1,131,747.00 direct and \$294,254.00 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders).</p>		
SRO Project Period	02/2022 - 03/2023		
Data Col Period	03/2022 - 08/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Donnalee Grey-Farquharson, Barb Homburg, Hongyu Johnson, James Koopman, Keith Liebetreu, David Acquaku, Ruyi Chen, David Kellermeyer		
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	Dec, 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 Dec 31, 2023	Total Cost to Date (direct + indirect):	1,684,473.95
	Est Cost at Completion (E\$AC):	1,684,473.95
	Total Budget:	1,685,902.70
	Variance (Total Budget minus- E\$AC):	1,428.75
	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 Dec 31, 2023	Dollars Projected for Month:	0.00
	Actual Dollars Used:	-371.32
	Variance (Projected minus Actual):	-371.32
	Reason for Variance:	The overrun amount was carried over from November 2023. There were no activities in December 2023.

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 Investigator/Clients	Dr. Steven Broglio (U of M Kinesiology)												
	Dr. Michael McCrea (Medical College of Wisconsin)												
	Dr. Thomas McAllister (Indiana University School of Medicine)												
Funding Agency													
IRB	HUM#: 00202691	Period of Approval: 7/23/2021 - open											
Project Team	Project Lead: Donnalee Ann Grey-Farquharson												
	Budget Analyst: David Kellermeyer												
	Production Manager: Barbara Aghababian-Homburg												
	Senior Project Advisor: Barbara Lohr Ward												
	Production Manager 1: Hongyu Johnson												
	Production Manager 2: Keith Liebetreu												
Proposal #	no data												
Description	<p>SRO will provide consultation, respondent locating activities and data collection for respondents in the longitudinal Concussion Assessment, Research and Education (CARE) study, with the goal of securing participation from 7,500 unique past-CARE study participants. Participants will complete the same set of study assessments at two time points over the five-year project period. The project follows collegiate athletes post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure. Specifically, SRO decentralized field interviewers will locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.</p> <p>This budget assumes an overall SRO involvement period of approximately 44 months over two waves. Wave 1 SRO involvement will begin in December 2021 with data collection taking place over approximately 12 months, beginning approximately May 2022. Wave 2 SRO involvement will begin in November 2023 with data collection taking place over approximately 12 months starting in May 2024.</p> <p>Currently, the total cost for the overall scope of work (based on the currently committed funding from all sources) is estimated at \$4,685,914. This includes \$3,718,978 direct and \$966,936 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders). As additional sources of funding are identified and those resources committed to SRO survey data collection activities, or inversely if a funder withdraws or reduces their level of funding to the project, the scope of work (e.g., the number of interviews to be collected) will increase or decrease respectively.</p> <p>The estimate of funding contributed by the Department of Defense through the MTEC RFP is \$2,277,689. This includes \$1,807,689 direct costs and \$470,000 indirect costs budgeted at the 26% indirect cost rate. The proposed period of support is September 1, 2021 through August 31, 2025.</p>												
SRO Project Period	10/2021 - 08/2026												
Data Col Period	03/2022 - 02/2026												
Security Plan	NA												
Milestones	<table> <tr> <td>Pre Production Start:</td><td>Pretest Start:</td></tr> <tr> <td>Pretest End:</td><td>Recruitment Start:</td></tr> <tr> <td>Staffing Complete:</td><td>GIT Start:</td></tr> <tr> <td>SS Train Start:</td><td>SS Train End:</td></tr> <tr> <td>DC Start:</td><td>DC End:</td></tr> </table>			Pre Production Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Complete:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
Pre Production Start:	Pretest Start:												
Pretest End:	Recruitment Start:												
Staffing Complete:	GIT Start:												
SS Train Start:	SS Train End:												
DC Start:	DC End:												
Other Project Team Members	Donnalee Grey-Farquharson, Barb Homburg, Hongyu Johnson, Keith Liebetreu, James Koopman, Ruyi Chen, David Ackuaku, David Kellermeyer												
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	Dec, 2023 (CARE SALTOS MTEC)		Implementing	
Risk Level	On Track			
Monthly Updates	<div>1. Project Management:<ul style="list-style-type: none">-Production was back on 12/6/2023 after a month long pausing due to a system issue regarding Respondent consents. There is some concern that we may not be able to make the intermediate goal SRO set for 04/30/2024 of 7500 first interviews. Including the work in DCP2 on 11/30 we were at 4301 first interviews. The SRO team is strategizing how to boost production using Interviewer challenges and also closely monitoring productivity. We may also extend data collection for DCP3 a month to end May 31, 2024.-SRO continued to work with the PI team to find solutions to resolve International TOA issues.-continue to work with Datalys and QG to fix issues/bugs that reported from the respondents and interviewers. This has serious implications on affecting HPI of the field.-The management team worked with the PM to find ways to increase productivity including allocating funds for retention bonus for interviewers.</div> <div>2. CARE SMS system:<ul style="list-style-type: none">-The SRO team was an integral part of the testing of the system fixes for the consent issue-continued to work with QG alongside with the PI team and Datalys on resolving ongoing technical issues.-requested QG to fix the result code for 'Text' in order to record contact attempt effort correctly.-received two new email message templates from QG for responding to respondents who had problems with registration or consent process.</div> <div>3. Questionnaire Development<ul style="list-style-type: none">- SRO Coordinated on updating and testing CATI survey questionnaire with Datalys, signed off for production.</div> <div>4. Production:<ul style="list-style-type: none">- Stats: as of 12/31/2023 (Total Released samples = 15045 (DCP3)<ul style="list-style-type: none">Total Completed lws = 1130 (RR = 7.5%)<ul style="list-style-type: none">Web = 1123CATI = 7- Locating Team: continued to use social media platforms to find potential respondents. As of 12/30/2023,<ul style="list-style-type: none">Total current tracking=509<ul style="list-style-type: none">- Total found = 189- Total Completed = 11</div> <div>5. DMSS:<ul style="list-style-type: none">- Currently, SRO receives data delivery from Datalys twice a week and the SRO dashboard reports are now running daily- Sample Release#5: on 12/15/2023, SRO received 1618 new samples (reduced from 1817 due to removing duplicated cases).</div> <div>6. Hiring and Training<ul style="list-style-type: none">-n/a</div>			
Special Issues				
Cost as of Dec 31, 2023	Total Cost to Date (direct + indirect):		1,745,456.99	
	Est Cost at Completion (E\$AC):		4,702,591.30	
	Total Budget:		4,685,914.00	
	Variance (Total Budget minus- E\$AC):		-16,677.30	
	Reason for Variance:		The budget is for the next two years (ending 2026). The biggest drive of the overrun was higher interviewer hours and freight and general supply charges were lot higher than projected in December. We have been monitoring closely through each production waves. We will continue to adjust the overrun accordingly.	
Projections as of Dec 31, 2023	Dollars Projected for Month:		104,526.86	
	Actual Dollars Used:		135,252.50	
	Variance (Projected minus Actual):		-30,725.64	
	Reason for Variance:		a lot more interviewers hours after resuming the production on 12/6/2023.	
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			

Project Name	(CCS) Community College Survey (On Track)		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 560,774.00	Indirect Budget: 84,115.00	Total Budget: 644,889.00
Principal	Hana Lahr (Teachers College, Columbia University)		
Investigator/Clients	Veronica Minaya (Teachers College, Columbia University)		
	Rachel Baker (University of Pennsylvania)		
Funding Agency	Ascendium Education Group		
IRB	HUM#: 00237400	Period of Approval:	
Project Team	Project Lead: Jeffrey Albrecht Jr		
	Budget Analyst: William Lokers		
	Production Manager:		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1: Rebecca Loomis		
	Production Manager 2: Steven Sonoras		
Proposal #	no data		
Description	The CCS seeks to understand factors that influence first year community college students in their program choice. We will survey a selection of students entering a community college for the first time in the fall of 2023 and then follow up with them in the second semester (Spring 2024) and their third semester (Fall 2024). The researchers will recruit 4 community colleges to participate.		
SRO Project Period	01/2023 - 03/2025		
Data Col Period	10/2023 - 11/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	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	Dec, 2023 (CCS)	Planning	
Risk Level	On Track		
Monthly Updates	In December, Ed and Jennie delivered Wave 1 datasets to the PIs. Becky prepared estimates for sending Wave 2 invitation cards with \$5 cash pre-payments. The PIs think that they can do it for less, so they are looking into that. If they decide to use U-M services, then they will add funds to our budget. Becky also coordinated the Spanish translation for the Wave 2 survey. Steven worked with Marsha to create the Wave 2 survey spec. We explored ways to reduce respondent burden and PDMG effort in collecting respondent addresses in Wave 2. We are proposing to preload address information into the survey for respondents to confirm or update. Hueichun and Shaowei started programming Web SMS for Waves 2-3. Jeff discovered that 193 respondents who completed Main surveys did not complete the NAPE and so were not sent TOAs. He worked with the business office, HSIP, and IRB-HSBS to arrange to send Amazon gift cards to these respondents, because all other payment options appear to require address information and so are not available to unhoused and undocumented respondents who do not have or are reluctant to provide an address. Normally, however, the Amazon gift cards do require addresses, but the business office is making an exception		

due to the unique circumstances of many of our respondents.

Special Issues

Cost as of Jan 18, 2024	Total Cost to Date (direct + indirect):	301,310.24
	Est Cost at Completion (E\$AC):	652,230.45
	Total Budget:	644,889.00
	Variance (Total Budget minus- E\$AC):	-7,341.45

Reason for Variance:

Projections for CCS currently exceed the budget by \$7,341.45 (about 1% of the total budget). This is down from a \$34,360 overrun reported in the last MPR.

Despite evidence to the contrary from MTF's non-response follow-up efforts, the CCS PIs are skeptical that reminder calling will improve response rates with the young respondents in this sample. Jeff proposed an experiment to evaluate the effects of reminder calling in Wave 2. The PIs agreed to this approach, which reduced SSL effort in Wave 2 from 644 to 285 hours. Given the PIs' doubts and the high projected overrun in November, Jeff removed calling projections for Wave 3. If we find that calling has a sufficient effect in Wave 2, then he will discuss adding it back for Wave 3.

Jeff also reduced project support further from 554 to 520 hours and data management from 288 to 248 hours for the remainder of the study.

Projections as of Jan 18, 2024	Dollars Projected for Month:	23,333.44
	Actual Dollars Used:	23,318.35
	Variance (Projected minus Actual):	15.09
	Reason for Variance:	December actuals were on par with projections for the month.

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

SRO Project Period	01/1996 - 01/1996			
Data Col Period				
Security Plan	NA			
Milestones	<div> <div> Pre Production Start: 09/01/2022 Pretest End: Staffing Complete: 02/27/2023 SS Train Start: 03/20/2023 DC Start: 03/27/2023 </div> <div> Pretest Start: Recruitment Start: 02/01/2023 GIT Start: SS Train End: 03/24/2023 DC End: 08/19/2023 </div> </div>			
Other Project Team Members	In addition to the above: Ian Ogden (SSS, Tech Coordinator); Anna Fuqua-Smith (SSI); Austin De Spirito (SSA); Jeff Smith (Tech Lead); Marsha Skoman (SurveyTrak); Heuchun Peng and Shaowei Sun (Self-Scheduler); Peter Sparks & Kelly Liesko (Blaise); Stephanie Windisch and Jennie William (Data Management); Ashwin Dey and Darnell Franklin (Webtrak, Weblog, Reports)			
Other Project Name				
Sample Mgmt System	SurveyTrak; Project specific system (Self-Scheduler for Telephone)			
Data Col Tool	Blaise 4.8; Other (ArcGIS - Survey 123)			
Hardware	Laptop; [UM cell] Phone			
DE Software	N/A			
QC Recording Tool	DRI-CARI			
Incentive	Yes, R; Yes, INF			
Administration	SRO Group; Other (PI Payment)			
Payment Type	Cash, post (\$10 or \$20 For Dried Blood Spots); Other (\$20 Finders Fee)			
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)			

Report Period	Dec, 2023 (EDC-Endline)		Closing	
Risk Level	On Track			
Monthly Updates	We will archive with final report next months.			
Special Issues	None			
Cost as of Jan 18, 2024	Total Cost to Date (direct + indirect):		1,203,246.85	
	Est Cost at Completion (E\$AC):		1,203,246.85	
	Total Budget:		3,097,511.00	
	Variance (Total Budget minus- E\$AC):		1,894,264.15	
	Reason for Variance:		See previous reports	
Projections as of Jan 18, 2024	Dollars Projected for Month:		0.00	
	Actual Dollars Used:		1,192.22	
	Variance (Projected minus Actual):		-1,192.22	
	Reason for Variance:		Only some TSG charges and very late-hitting admin asst and Arialink charges. Also one DCO cell phone was still being charged. Reversing some of these.	
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: 3,519,976.47	Indirect Budget: 1,267,191.53	Total Budget: 4,787,168.00
Principal	Kenneth Langa (SRC)		
Investigator/Clients	David Weir (SRC)		
Funding Agency			
IRB	HUM#: HUM00099822		Period of Approval:
Project Team	Project Lead: Maureen Joan O'Brien		
	Budget Analyst: Richard Warren Krause		
	Production Manager: Margaret Lavanger		
	Senior Project Advisor: Evanthia Leissou		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>This project will involve the completion of a face-to-face CAPI interview, designed to provide a dementia assessment of HRS respondents. A sample of 5000 respondents (one per household) who are 65 years of age or older will be selected for this effort. The questionnaire is a series of 15 cognitive tests and will be administered to respondents after the HRS 2022 interview has been completed. The sample will not be clustered geographically; it will be selected randomly. It is expected that the field team will carry out well-planned regional trips in order to complete the 3,530 in-person interviews. An informant interview will also be completed for each of the respondents interviewed.</p> <p>The respondent questionnaire length is expected to be 60 minutes. The informant questionnaire is expected to be 20 minutes and can be administered in-person after the R interview, or by telephone/mail if FTF is not available.</p>		
SRO Project Period	01/2022 - 12/2023		
Data Col Period	07/2022 - 11/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 04/01/2022 Pretest End: 05/21/2020 Staffing Complete: SS Train Start: 07/13/2022 DC Start: 07/18/2022 </div> <div> Pretest Start: 05/01/2020 Recruitment Start: GIT Start: SS Train End: 07/15/2022 DC End: 11/30/2023 </div> </div>		
Other Project Team Members	PDMG: Tony Romanowski, Lisa VanHavermaet, Megan Hromco, Kristen Cross. TSG: Jeff Smith, Brad Goodwin, Valyn Dall, Peter Sparks, Ashwin Dey, Deb Wilson		
Other Project Name	Harmonized Cognitive Assessment Protocol		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone		
DE Software	Blaise 4.8 BIA		
QC Recording Tool	NA		
Incentive	Yes, R; Yes, INF		
Administration	NA		
Payment Type	Check, prepaid (50); Cash, post (25)		
Payment Method	Check through STrak RPay System		

Report Period	Dec, 2023 (HCAP 2022)		Implementing
Risk Level	On Track		
Monthly Updates	<p>The final HCAP iw was completed on 12/9. We extended into December in order to attempt to reach Informants for the Rs who were completed up to 11/30.</p> <p>Some activity has continued into January to accommodate interviewer materials arriving back to Ann Arbor, organizing materials that are being kept for next wave, disposing of materials that we will not need for future waves, and reconciling a few check requests that have come in. Some minor costs continue to hit the account. There may be a few charges for next month, including payment to a translator for a non-hearing R that was delayed due to the vendor needing to create an account with U-M.</p>		

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 Jan 18, 2024	Total Cost to Date (direct + indirect):	4,804,447.25		
	Est Cost at Completion (E\$AC):	4,805,230.72		
	Total Budget:	4,787,168.00		
	Variance (Total Budget minus- E\$AC):	-18,062.72		
	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, and up to 243,000 if needed. Money was provided from the parent that reduced the overrun.		
Projections as of Jan 18, 2024	Dollars Projected for Month:	114,267.55		
	Actual Dollars Used:	153,890.07		
	Variance (Projected minus Actual):	-39,622.52		
	Reason for Variance:	Staff hours and travel hours were higher than projected due to last minute trips to boost production.		
Measures		Units at Complete	RR	HPI
	Current Goal:	5641	68	4.8
	Goal at Completion:	5641	68	4.8
	Current Actual:	5841	70.8	4.87
	Estimate at Complete:	5841	70.8	4.87
	Variance:	+200	+2.4%	+0.07
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 Investigator/Clients	Kristine Ajrouch (Life Course Development Program, SRC)		
	Toni Antonucchi (Life Course Development Program, SRC)		
	Laura Zahodne (Life Course Development Program, SRC)		
Funding Agency			
IRB	HUM#: HUM00146040	Period of Approval: 4/9/2020	
Project Team	Project Lead: Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Taghreid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 600 interviews with recently identified Arab Americans aged 65 or older residing in Southeast Michigan and 330 interviews with Social Relations sample members aged 65 or older. The Arab American sample will be selected based on an in-person household screening. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements. Social Relations respondents will only complete the cognitive interview. An informant interview will also be conducted for all sample members. Interviews will be conducted in English or Arabic.		
SRO Project Period	05/2019 - 03/2023		
Data Col Period	05/2023 - 03/2024		
Security Plan	No		
Milestones	<div><div>Pre Production Start: 12/01/2022</div><div>Pretest End:</div><div>Staffing Complete: 04/10/2023</div><div>SS Train Start: 05/18/2023</div><div>DC Start: 05/30/2023</div></div> <div><div>Pretest Start:</div><div>Recruitment Start: 02/01/2023</div><div>GIT Start: 05/16/2023</div><div>SS Train End: 05/25/2023</div><div>DC End: 09/30/2023</div></div>		
Other Project Team Members	Taghreid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall		
Other Project Name	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	Dec, 2023 (Health and Well Being in SE MI)	Implementing
Risk Level	Attention!	
Monthly Updates	<p>The D-AMP project unfortunately continues to fall well behind budgeted production estimates in all areas. As of Nov 30, 2023, the study had used 63% of its direct cost budget to complete 25% of the budgeted screeners and complete just 6% of its production interviews.</p> <p>Projections were recently updated to more closely match interviewer effort and sample yield. This had the effect of extending data collection for several months. At this point in production, the project should have yielded close to 800 main interviews, but in fact has only yielded 92 main interviews. The project has been hampered by lower than expected eligibility, and higher than expected screening and main interview resistance. As of Dec 18, the field team had finalized 2,167 out of 4,598 screening lines released to the field. (Panel cases have not yet been released).</p> <p>Hours per interview and hours per screener remain significantly higher than budgeted (overall 44.7 HPI). The project had been getting close to the required number of interviewer hours (despite significant attrition), however</p>	

the hours worked have not producing completed interviews. Eligibility through November was far lower than budgeted (10% compared to the budget of 17%), and respondents have been extremely resistant to participating. DMSS re-drew the remaining sample in November and selected only areas with >50% MENA population. The new sample was released in early December, and has dramatically improved eligibility (42% for the new release although the n is small).

SRO conducted an interviewer training of experienced, on-staff interviewers at the end of November, beginning of December. The new team consisted of 4 Detroit-area experienced interviewers and 4 travelers. While the travelers stayed to work for about one week post training, only one of the travelers has agreed to make a return trip to assist the project.

In January 2024 the research team approved extending the project (to use remaining funds), releasing the panel sample, and hiring new screeners. The research team has also asked for updated projections and budget estimates to complete the full number of desired interviews. These estimates are in progress.

The study still faces the issue of a community that is resistant to screening and resistant to participating in research. Several approaches are being tried to improve the situation, including increased publicity in the community, utilizing an experienced research assistant to call resistant households, and hiring a team of "community influencers" to contact resistant households. In addition, the team has decided to pilot the use of a "welcome packet" for households that have screened in.

We still do not have a full complement of approved Arabic materials. We also continued to press the PIs to update and maintain the website for the study. Arabic translations added to the study website in January.

Special Issues

We have been keeping the dire financial situation of the study in front of the PIs as frequently as possible, including revising the monthly activity report to emphasize the financial and production situation. (The financial situation was reviewed in September, November, and early January.) The PIs acknowledged the poor study outcomes in January and asked for updated projections to present to the program officer. The PIs are meeting with the program officer on January 23. Unfortunately we did not have enough advance notice to prepare ballpark projections.

NOTE: 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.

Cost as of Jan 18, 2024	Total Cost to Date (direct + indirect):	2,516,503.42
	Est Cost at Completion (E\$AC):	3,757,306.97
	Total Budget:	3,758,127.00
	Variance (Total Budget minus- E\$AC):	820.03
	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 Jan 18, 2024	Dollars Projected for Month:	196,712.74
	Actual Dollars Used:	153,955.80
	Variance (Projected minus Actual):	42,756.94
	Reason for Variance:	Respondent cooperation is extremely low, and interviewers put in fairly low effort over the December holiday. Low production has resulted in lower than anticipated respondent payments, interviewer travel, and survey tech effort. We have significantly reduced the expected monthly cost of data collection to match the lower effort and yield as well as extended data collection period.

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:	92 main, 62 inf	33% scr, 37.4% main	44.7 HPI w/screening
	Estimate at Complete:			
	Variance:			

Other Measures

RR shown above are for the released sample.
Budgeted at 140 minutes, the D-AMP average interview length is 161 minutes.
Saliva participation rate is roughly 84% 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	<div><div>Pre Production Start: 01/01/2021</div><div>Pretest End: 11/23/2021</div><div>Staffing Complete: 01/15/2022</div><div>SS Train Start: 02/23/2022</div><div>DC Start: 03/07/2022</div></div> <div><div>Pretest Start: 11/01/2021</div><div>Recruitment Start: 08/01/2021</div><div>GIT Start: 02/21/2021</div><div>SS Train End: 03/03/2022</div><div>DC End: 06/30/2024</div></div>		
Other Project Team Members	<div>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)</div> <div>Tech Team: Karl Dinkelmann, Jeff Smith, Jim Rodgers, Laura Yoder, Marsha Skoman, Ashwin Dey, Pam Swanson, David Bolt, Deb Wilson, Jennie Williams, Rose Zybdel, Stephanie Windisch, Holly Ackerman, Shane Empie, Kelly Chatain, Brianna Sabol</div> <div>Coding Lead: Carolyn Vieira-Martinez</div>		
Other Project Name	HRS 2022 Main lws		
Sample Mgmt System	SurveyTrak; MSMS		
Data Col Tool	Blaise 5; SAQ		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Blaise 5 Coding Application); External vendor (DataForce)		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	NA		
Payment Type	Check, prepaid (\$80 (Panel)); Check, post (\$50 (WBD)); Cash, post (\$20 (SAQ), \$100 (Baselines))		
Payment Method	Check through STRak RPay System; Check through other system (Rpay system set up for MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (Rpay system set up for MSMS); Imprest Cash Fund from ISR Business Office (Rpay system set up for MSMS)		

Report Period	Dec, 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 implementing the baseline end game protocol.

3. Baseline production has increased since implementing the baseline end game strategy on December 5 and the release of additional screener sample in December leading to more baseline sample being generated. Interviewers continue to work less hours than committed but that has also improved. Field managers continue to work with interviewers who are not meeting expectations.

5. Project team has been working with HRS Exec and DMSS on developing reports to better monitor high priority, end game, and screening effort rates at a weekly and biweekly level by PSU.

6. Different scenarios for goals, extending data collection beyond June 2024, and associated costs were submitted for Dr. Weir's review.

7. Based on the propensity model run in September, there are 3,985 baseline cases that have ever been flagged priority of which 575 (14%) have completed an interview. Newly generated baselines from screening continue to be flagged on a weekly basis.

8. The endgame protocol sample consists of households with resistance or 120+ since screened. The sample is mailed a letter offering an additional \$100 upon completion of the interview and interviewers follow-up with one attempt before final coding non-interview, unless the interview was started on the spot or an appointment has been scheduled. 3,897 baseline respondents have been mailed the end game letter of which 268 (7%) have completed the interview and 60 (2%) have scheduled an appointment. Weekly, new cases are flagged for end game once they meet the resistance or 120+ days since screened criteria.

*The "measures" table reflects both Panel and Baseline combined as of 1/19 (note: Projections were updated in December taking into account actuals to date and effort needed to reach goals)

Special Issues	<ul style="list-style-type: none"> - 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. 	
-----------------------	--	--

Cost as of Jan 18, 2024	Total Cost to Date (direct + indirect):	18,063,560.71
	Est Cost at Completion (E\$AC):	18,063,560.71
	Total Budget:	19,016,630.00
	Variance (Total Budget minus- E\$AC):	953,069.29
	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.

Projections as of Jan 18, 2024	Dollars Projected for Month:	-34,000.00
	Actual Dollars Used:	-28,854.95
	Variance (Projected minus Actual):	-5,145.05
	Reason for Variance:	Fewer panel sample check voids hit in the month than originally projected. Future projections adjusted in CRS.

Measures		Units at Complete	RR	HPI
	Current Goal:	15,963	50%	11.3
	Goal at Completion:	23,468	46%	7.9
	Current Actual:	15,954	51%	11.3
	Estimate at Complete:	22,186	44%	9.8
	Variance:	1,282	2%	1.9

Other Measures	<p>Panel: Expected RR: 68% (original goal 74%), Final RR: 68% (Panel end date 9/2/23)</p> <p>2022 Baselines generated from screener: Goal RR: 26% (6,450 iws) Current RR: 26.1% (2,489 completed) from 9,626 baselines spawned from screener as of 1/18/24.</p> <p>2019 EGenX baselines: Goal RR: 70% , Current RR: 73.8%</p>
-----------------------	---

Project Name	(HRS 2024) Health and Retirement Study 2024 (Some Concerns)		
Project Mode	Primary: Mixed Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	Direct Budget: 603,986.00	Indirect Budget: 217,435.00	Total Budget: 821,421.00
Principal Investigator/Clients	David Weir (ISR-SRC)		
Funding Agency			
IRB	HUM#: HUM000611128	Period of Approval: 6/7/2023-6/6/2024	
Project Team	Project Lead: Evanthia Leissou		
	Budget Analyst: Richard Warren Krause		
	Production Manager: Andrea Sims		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Derek Dubuque		
	Production Manager 2: Jennifer C Arrieta		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.		
SRO Project Period	05/2023 - 08/2025		
Data Col Period	04/2024 - 05/2025		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 05/15/2023</div><div>Pretest End: 02/18/2024</div><div>Staffing Complete:</div><div>SS Train Start: 04/23/2024</div><div>DC Start: 05/06/2024</div></div> <div><div>Pretest Start: 01/29/2024</div><div>Recruitment Start: 12/19/2023</div><div>GIT Start: 04/22/2024</div><div>SS Train End: 04/29/2024</div><div>DC End: 05/31/2025</div></div>		
Other Project Team Members	<p>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)</p> <p>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</p>		
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		

Report Period	Dec, 2023 (HRS 2024)		Planning
Risk Level	Some Concerns		
Monthly Updates	<p>HRS 2024 pre-production activities continued with focus cost projections, technical specifications, technical development, testing, pretest training material and bulk mailing preparations, pretest IRB submission, and production on-staffer recruitment.</p> <p>HRS 2024 Pretest in SurveyTrak will utilize Blaise 5.14. The tech team continued to meet almost weekly since early December with CBS to try to resolve issues in Blaise 5.14 that would impact Web Panel data collection (which includes web self iws and non-response follow-up TEL/FTF iws conducted in MSMS). There three main issues they have been trying to resolve for HRS 2024 production, and making progress on, per Karl's 1/19/24 update to the</p>		

tech team:

1. The session database was not moving up and down as expected. Most scenarios have been addressed and are fixed. There are two scenarios which are not working and need more investigation. Details are being shared with CBS.
 2. The instrument was not downloading and installing correctly. This issue was resolved 1/17 and appears to be working.
 3. The CAPI instrument launches and always lands on the error page. CBS provided a new API DLL 1/19, which was needed to create a custom data entry program for MSMS, has fixed this issue.
- The next meeting with CBS is 1/23/24.

Pretest training: Ypsi Marriott 1/27-1/28.

Production training: Southfield Westin 4/22-4/29 (2 days GIT, 6 days Study Specific)

TEL, FTF, FTFe Production start (SurveyTrak): 5/6

Web Production Start: 6/3

Special Issues		-Resource (Field Staff) concerns for HRS 2024 preproduction and production while HRS 2022 data collection. The plan is to recruit @80 interviewers for start of 2024 production and, as 2022 interviewers finish screening/baseline work, transition them over to 2024. -Blaise 5.14 issues that could impact Web Panel production.		
Cost as of Jan 18, 2024	Total Cost to Date (direct + indirect):	289,255.95		
	Est Cost at Completion (E\$AC):	996,221.16		
	Total Budget:	821,421.00		
	Variance (Total Budget minus- E\$AC):	-174,800.16		
	Reason for Variance:	Variance sine last month due to adding projections for adding costs to purchase saliva kits and production recruitment projections. Projections in CRS are 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 Jan 18, 2024	Dollars Projected for Month:	96,465.31		
	Actual Dollars Used:	79,109.08		
	Variance (Projected minus Actual):	17,356.23		
	Reason for Variance:	Variance primarily due to staff hours and a DataForce invoice that did not hit in December. Future projections have been updated.		
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	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name	HRS Historical Coding		
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	Desktop		
DE Software	Other (Coding Application)		
QC Recording Tool	NA		
Incentive	Not used		
Administration	N/A		
Payment Type	N/A		
Payment Method	N/A		
=====			
Report Period	Dec, 2023 (HRS HOC)		Planning
Risk Level	Some Concerns		
Monthly Updates	During the month of December, - Jeannie participated in and scheduled meetings with the PI and budget analyst. - Due to disappointing NIOCCS matches, HRS requested two "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 -Eva submitted proposal for two options: Option 1: Case count is 25,434. These cases completed interviews in 1994-2002 waves and have been coded using only the 1980 occupation codes. Option 2: Case count is 41,089. These cases completed interviews in 1994-2008 waves and have been coded using 1980 or 2000 codes, but not the newest 2010 codes. Amanda requested additional counts for coding added to Option 2 for 1993 and 1995 (AHEAD):1993-8285; 1995-363 We are currently waiting on response from SSL regarding completion time frame after which a formal proposal will be drafted. -Work was not transferred to SSL as anticipated in December. Timing of coding starting is dependent on final decisions to workscope changes.		

Special Issues	- Work load for SSL Coding will significantly increase from ~10,000 cases to ~42,000.	
	- 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.	
	-Part time status of Michael Nolte affects completion of work	

Cost as of Jan 18, 2024	Total Cost to Date (direct + indirect):	24,383.25
	Est Cost at Completion (E\$AC):	86,248.37
	Total Budget:	92,157.06
	Variance (Total Budget minus- E\$AC):	5,908.69
	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 Jan 18, 2024	Dollars Projected for Month:	7,466.96
	Actual Dollars Used:	1,108.93
	Variance (Projected minus Actual):	6,358.03
	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 February 2024 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 Investigator/Clients	David Weir (SRC) Helen Levy (SRC) Ken Langa (SRC)		
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Evanthia Leissou Budget Analyst: Richard Warren Krause Production Manager: Senior Project Advisor: Nicole G Kirgis Production Manager 1: Andrew L Hupp Production Manager 2: Theresa Camelo		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample.		
SRO Project Period	02/2021 - 08/2024		
Data Col Period	03/2022 - 06/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: 04/19/2022 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	SurveyTrak; MSMS; Other ((Blaise) Case Management App (CMA))		
Data Col Tool	Blaise 5		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Blaise 5 web instrument); N/A		
QC Recording Tool	Camtasia; N/A		
Incentive	Yes, R; Yes, INF		
Administration	SRO Group		
Payment Type	Check, post; Cash, prepaid (\$2); Cash, post		
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office		
=====			
Report Period	Dec, 2023 (HRS2022-Screening)		Implementing
Risk Level	Some Concerns		
Monthly Updates	<p>Screening is going at a steady pace as the focus has been on baseline production. Goals have been updated to reflect the priority of interviewers work in the field (baseline high priority, baseline endgame, screening endgame, and screening) and the effort (hours) the interviewers are actually providing. The first part of Release 6 (n=6,332) were released to the web and to the field on 12/15. The remainder Release 6 (n=9,313) was released to the web on 12/22.</p> <p>We have released 7,495 cases to the endgame protocol. 556 cases (7.4%) of cases have completed a screener. 58 cases (10%) completed via the web, and 498 (90%) of cases completed in-person.</p> <p>SRO and sampling team have been working together on the sample design. Paul has prepared the additional 896 reserve segments. Those 896 segments have been broken into 6 replicates. There will be two address sorting trainings. The first will be next week with three Ann Arbor staff. Five field staff will be (remotely) trained sometime after the pretest training.</p>		

Special Issues

Cost as of Jan 15, 2024	Total Cost to Date (direct + indirect):	19,086,671.88
	Est Cost at Completion (E\$AC):	26,271,004.59
	Total Budget:	28,919,242.00
	Variance (Total Budget minus- E\$AC):	2,648,237.41
	Reason for Variance:	Overall, the total underrun for HRS 2022 New Cohort increased from last month by \$227,234 to \$2,639,948, essentially all due to the lower iwer hours worked than projected. The team is in the process of updating interviewer projections and having a discussion with David about how long data collection might go.

Projections as of Jan 15, 2024	Dollars Projected for Month:	2,160,124.30
	Actual Dollars Used:	1,424,666.89
	Variance (Projected minus Actual):	735,457.41
	Reason for Variance:	Unused hosting, RPay, and travel projections have been projected forward. The unused hours have not been pushed forward yet due to the updating of the weekly goals.

Measures		Units at Complete	RR	HPI
	Current Goal:	3,600/1,500 HHs	73%	3.0
	Goal at Completion:			
	Current Actual:	3,303/3,017	38.8%	2.75
	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: 122,053.00	Indirect Budget: 12,206.00	Total Budget: 134,259.00
Principal Investigator/Clients	Sonalde Desai (University of Maryland)		
	Stephanie Chardoul (University of Michigan)		
	Santanu Pramanik (National Council of Applied Economic Research)		
Funding Agency	National Institutes of Health, Department of Health and Human Services		
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Sarah Elisa Broumand		
	Budget Analyst: Ryan Neice		
	Production Manager:		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Sarah Elisa Broumand		
	Production Manager 2: Sarah Elisa Broumand		
Proposal #	no data		
Description	The India Human Development Survey (IHDS) is a nationally representative, multi-topic, longitudinal survey of 41,554 households in 1503 villages and 971 urban neighborhoods across India. The first round of interviews were completed in 2004-5; data are publicly available through ICPSR. A second round of IHDS reinterviewed most of these households in 2011-12 (N=42,152). SRC joins IHDS Wave 3 to automate data collection, the scope of work includes methodological design, sample design, questionnaire design, technical instrument design, supervisor/interviewer training, production monitoring, quality control, data dissemination, and 2-3 weekly conference calls for capacity building.		
SRO Project Period	01/2019 - 03/2024		
Data Col Period	05/2022 - 10/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Project Management Team Stephanie Chardoul -- Senior Project Advisor (SPA) Sarah Broumand - Project Manager Programming Team Collette Keyser - Blaise Marsha Skoman - SurveyTrak Holly Ackerman - WebTrak Cheng Zhou - Sync HelpDesk Team Emmanuel Ellis John Data Manager Team Sarah E Jennie		
Other Project Name			
Sample Mgmt System	Other (SurveyTrak INTL)		
Data Col Tool	Blaise 5		
Hardware	Laptop; Other (NCAER Phone (In India))		
DE Software	Other (TBD)		
QC Recording Tool	DRI-CARI		
Incentive	Yes, Other (TBD)		
Administration	Other (TBD)		
Payment Type	Other (TBD)		
Payment Method	Other (TBD)		
=====			
Report Period	Dec, 2023 (IHDS3)		Implementing

Risk Level	On Track			
Monthly Updates	<p>Team released data model for the last Agency 14. There will be additional edits to fix data. We continue to release additional languages for the Migrant projects, project estimates this will keep going until March or so. We continue to work through some case recoveries and complete the close out activities for agencies that finished production making sure complete counts match data delivered. We did recently received news that production will continue through May 2024 and contract ends in May. Team will prepare to handle this with Stephanie's guidance.</p> <p>-- Cost Data Has to be refreshed 1/17</p>			
Special Issues	Wave 3 funding balance ended at -\$18,833.61 direct and indirect costs (-\$12,072.53 Direct))			
Cost as of Jan 18, 2024	Total Cost to Date (direct + indirect):			80,317.91
	Est Cost at Completion (E\$AC):			132,584.83
	Total Budget:			134,259.00
	Variance (Total Budget minus- E\$AC):			1,674.17
	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 Jan 18, 2024	Dollars Projected for Month:			15,104.98
	Actual Dollars Used:			9,994.40
	Variance (Projected minus Actual):			5,110.58
	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	<p>The HRS Life History Mail Survey (LHMS) is part of the Health and Retirement Study. The goal of LHMS is to collect retrospective life histories of HRS participants to address multidisciplinary need for information about events, residential location, and education over the entire life course. Information like this allows researchers to understand how individuals' pasts shape their health and economic situations today.</p> <p>A paper questionnaire will be mailed to a sample of approximately 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.</p>		
SRO Project Period	09/2023 - 04/2024		
Data Col Period	10/2023 - 02/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 09/01/2023 Pretest End: Staffing Complete: SS Train Start: DC Start: 10/05/2023 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 02/29/2024 </div> </div>		
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	Dec, 2023 (LHMS 2023 Fall)		Implementing
Risk Level	On Track		
Monthly Updates	Fall LHMS activities and notable events: 1- SAQs received and logged 2- Progress reports prepared and delivered to PIs 3- SAQs shipped to DataForce for scanning 4- Scanned SAQs and Fall data deliveries delivered to PIs		

- 5- Crosswalk for data delivery prepared by project managers
- 6- Thank you post cards generated and mailed
- 7 -Reminder calling data collection

Special Issues	<ul style="list-style-type: none"> - 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 (as of 1/19/2024) is 17%. -Reminder calling will be extended through the end of February 	
-----------------------	---	--

Cost as of Jan 17, 2024	Total Cost to Date (direct + indirect):	252,021.75
	Est Cost at Completion (E\$AC):	315,146.78
	Total Budget:	505,359.00
	Variance (Total Budget minus- E\$AC):	190,212.22
	Reason for Variance:	Staffing for reminder calling will not meet original projections.

Projections as of Jan 17, 2024	Dollars Projected for Month:	122,576.94
	Actual Dollars Used:	80,948.59
	Variance (Projected minus Actual):	41,628.35
	Reason for Variance:	SSL reminder calling hours worked did not match projections due to staff availability. Dataforce invoice amount was overprojected by 30k. After speaking with Dataforce, remainder of the projection will not be carried forward.

Measures		Units at Complete	RR	HPI
	Current Goal:			N/A
	Goal at Completion:	2063	54%	N/A
	Current Actual:	523	14%	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	<p>The HRS Life History Mail Survey (LHMS) is part of the Health and Retirement Study. The goal of LHMS is to collect retrospective life histories of HRS participants to address multidisciplinary need for information about events, residential location, and education over the entire life course. Information like this allows researchers to understand how individuals' pasts shape their health and economic situations today.</p> <p>A paper questionnaire will be mailed to a sample of approximately 2,288 HRS Respondents. From this sample, approximately 1,242 completed surveys are expected (54% response rate). For the reminder protocol, 495 respondents have been designated to receive a reminder by postcard. The remaining 1,793 respondents will receive reminders by phone to complete the questionnaire. When a respondent is reached by phone, SRO will attempt to complete the 60-minute interview by telephone. Thank you postcards will be mailed to respondents who return a completed questionnaire.</p>		
SRO Project Period	04/2023 - 12/2023		
Data Col Period	06/2023 - 09/2023		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 04/01/2023</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start: 07/11/2023</div><div>DC Start: 06/20/2023</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End: 07/11/2023</div><div>DC End: 09/26/2023</div></div>		
Other Project Team Members	Gary Hein: Project Lead Cindy Tsao: Budget Analyst Vanessa Clarke: Project Assistant Carolyn Viera Martinez: Coding Lead		
Other Project Name	LHMS Spring		
Sample Mgmt System	SMS		
Data Col Tool	SAQ; Other (Blaise SMS)		
Hardware	Desktop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Check, prepaid (\$25)		
Payment Method	Check through STRak RPay System		

Report Period	Dec, 2023 (LHMS 2023 Spring)	Implementing
Risk Level	On Track	
Monthly Updates	December Activities and Notable Events: 1 -Logged returned SAQs 2- Weekly progress reports created and delivered to project stakeholders 3- Data delivery of completed scanned SAQs to Pls 4- Completed SAQs mailed to Dataforce for scanning 5- Created of data crosswalks for data deliveries	

Special Issues	None			
Cost as of Jan 18, 2024	Total Cost to Date (direct + indirect):	245,014.93		
	Est Cost at Completion (E\$AC):	230,280.84		
	Total Budget:	457,922.00		
	Variance (Total Budget minus- E\$AC):	227,641.16		
	Reason for Variance:	Actual sample of 1,950 is lower than budgeted sample of 2,288, resulting in generally lower costs across all resources. Check voids have also been added to the projections. 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 Jan 18, 2024	Dollars Projected for Month:	11,039.88		
	Actual Dollars Used:	4,931.40		
	Variance (Projected minus Actual):	6,108.48		
	Reason for Variance:	Variance primarily due to lower staff hours and SurveyTech hours, as well as postage and freight charges expected to hit in December that did not. Projections have been updated in future months.		
Measures		Units at Complete	RR	HPI
	Current Goal:	1053	54%	N/A
	Goal at Completion:	1053	54%	N/A
	Current Actual:	350	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	Nancy Fleischer (U-M School of Public Health (SPH))		
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	<p>MI CReSS is a partnership between the University of Michigan School of Public Health (SPH) and the Michigan Department of Health and Human Services. It is a public health surveillance study to learn about Michiganders' experiences with COVID-19 using a representative sample of confirmed cases within the state. Using survey data, they plan to document sociodemographic inequities in COVID-19 testing, treatment, and recovery.</p> <p>SRO's involvement includes the administration of a Follow-up survey for respondents that completed a Baseline survey with the SPH team. Based on the sample information provided, we will be re-contacting approximately 3,995 respondents who have already completed (or are estimated) to complete the Baseline survey to administer the Follow-up survey.</p> <p>The Follow-up survey is estimated to be 45 minutes in length, and Respondents will be encouraged to complete the survey by web. However, SRO Interviewers will contact non-responders and conduct the interview over the telephone if the Respondents do not want to complete the survey on the web. HUM00181068 - Year 3 IRB Exempt - Budget:\$841,375 Total used:\$649,836 HUM00234617 - Year 4 - IRB approved - Budget:\$477,681</p>		
SRO Project Period	08/2021 - 09/2023		
Data Col Period	01/2022 - 07/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: 07/28/2023 DC Start: 09/14/2023 </div> <div> Pretest Start: Recruitment Start: 06/01/2023 GIT Start: SS Train End: 07/29/2023 DC End: 06/30/2023 </div> </div>		
Other Project Team Members	Bill Lokers: Financial Analyst Megan Hromco: Production Assistant Hueichun Peng: Technical Lead / WSMS db Programmer Peter Sparks: CAI Programmer (Blaise 5) Cheng Zhou: Web Component, ADT, Reports LihShwu Ke: DBA Architecture & Data Security Sarah Broumand: Data Manager Deb Wilson: Help Desk		
Other Project Name			
Sample Mgmt System	Web SMS		
Data Col Tool	Blaise 5		
Hardware	Laptop; Desktop		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Other (HSIP VISA Gift Card)		
Payment Method	NA		

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

Risk Level	On Track		
Monthly Updates	<p>Cohort 1 - Completed in field and data has been delivered. Final report delivered - 12/19/2023</p> <p>Cohort 2 launched - Sept 14, 2023 - Spanish launched - Arabic, waiting for translations - Adding/extending CATI reminder calling to releases 1 to 7. - Adding an additional Hardcopy reminder (#2) in an attempt to get closer to the Response Rate achieved for FO1</p>		
Special Issues	<p>Proposal for Release 9-16 submitted 1/19/2024</p> <p>Starting to look more into why we are not seeing the same Response Rate as FO1 for the same releases. - Lower # of attempts currently compared to FO1 - Have received around 10 mentions of the U of M data breach as to why Rs don't want to complete the FO2 Survey. (Phone, Email, and SMS)</p>		
Cost as of Dec 20, 2023	Total Cost to Date (direct + indirect):	215,469.18	
	Est Cost at Completion (E\$AC):	474,573.48	
	Total Budget:	477,681.00	
	Variance (Total Budget minus- E\$AC):	3,107.51	
	Reason for Variance:	Fewer hours billed to project than estimated/projected although we caught up by \$15k	
Projections as of Dec 20, 2023	Dollars Projected for Month:	86,330.85	
	Actual Dollars Used:	76,881.06	
	Variance (Projected minus Actual):	-6,699.39	
	Reason for Variance:	Survey Tech II and III billed more time than projected even with us adjusting for the 3 pay periods in December.	
Measures		Units at Complete	RR
	Current Goal:	1650	65
	Goal at Completion:	2030	80%
	Current Actual:	1476	60.4
	Estimate at Complete:	1900	75%
	Variance:	-130	-5%
Other Measures	Targeting 80% of eligible Rs that completed the Main survey to complete the MoCA section in CATI. We are currently at 90% of those who are eligible.		

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	<p>Since 1975 the MTF survey has measured drug and alcohol use and related attitudes among adolescent students nationwide. A nationally representative sample of survey participants report their drug use behaviors across three time periods: lifetime, past year, and past month. The survey is funded by the NIDA, a component of the National Institutes of Health (NIH), and conducted by the University of Michigan.</p> <p>It is based on two interconnected series of surveys using nationally representative samples:</p> <p>(a) self-administered annual in-school surveys of 8th, 10th, and 12th graders (~45,000) in 400 schools. Proctors (SRO interviewers) coordinate and administer the data collection in schools (either FTF or remotely without visiting the schools).</p> <p>(b) panels of high school graduates aged 19-30, 35, 40,45, 50, 55, and 60 (now primarily surveyed by web). Panel members aged 19-30 are invited to participate every other year/asked to complete a web survey and the older sample members are sent questionnaires (mail and web) at five-year interval. The MTF panel study has three parts - early in the year a newsletter is mailed to panel members. If the newsletter is returned (undelivered) locating effort targets these panel members and others who have not participated for X years. The web panel launches (web) in spring and in around June a telephone non-response effort begins for those invited to participate. The panel members are recruited from the 12th graders who participate in the base year study.</p> <p>Press releases and published results can be found here.. http://www.monitoringthefuture.org/</p>		
SRO Project Period	04/2022 - 03/2027		
Data Col Period	04/2022 - 03/2027		
Security Plan	Yes		
Milestones	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div style="width: 45%;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
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	Dec, 2023 (MTF Base Year 2022_27)		Implementing
Risk Level	On Track		
Monthly Updates	December 2023 Since last month,...		

- Finalised training materials and agendas,
- 'Frozen' SurveyTrak for training which will take place mid' January.
- Prepared all training and some interviewer materials to ship prior to the Holiday and also shipped tablets and equipment to Interviewers.
- Met the three MTF TLs to begin preparations for training and beginning of production.
- work to transition MTF to Qualtrics is on track.

Special Issues

Cost as of Jan 18, 2024	Total Cost to Date (direct + indirect):	1,855,148.50
	Est Cost at Completion (E\$AC):	6,848,696.56
	Total Budget:	9,778,060.00
	Variance (Total Budget minus- E\$AC):	2,929,363.44

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 Jan 18, 2024	Dollars Projected for Month:	85,883.94
	Actual Dollars Used:	66,199.29
	Variance (Projected minus Actual):	19,684.65

Reason for Variance:

Costs for Telephone Admin Fees, Freight and General Supplies were below projected costs. Some staff hours were also below those projected.

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

Other Measures

Project Name	(MTF Early Panel Pilot) Monitoring the Future: A Cohort-Sequential Panel Study of Drug Use, Ages 19-65 - Administrative Supplement #1 (8/10th Grade Panel) (On Track)		
Project Mode	Primary: Web		
Project Type	Sponsored Projects		
Budget	Direct Budget: 184,954.00	Indirect Budget: 103,575.00	Total Budget: 288,529.00
Principal Investigator/Clients	Megan Patrick (ISR, SRC)		
Funding Agency			
IRB	HUM#: 00244359	Period of Approval:	
Project Team	Project Lead: Donnalee Ann Grey-Farquharson Budget Analyst: Dean E Stevens Production Manager: Senior Project Advisor: Rebecca Gatward Production Manager 1: Production Manager 2:		
Proposal #	no data		
Description	<p>After the MTF research team delivers survey specifications for each of the 2 waves of data collection, SRO will program the instruments and conduct integration testing with the sample management system. When testing is complete, SRO will launch the 2024 and 2025 Web survey data collections with an estimated sample size of 600 cases per wave of data collection. The Principal Investigator will identify the sample and deliver contact information including e-mail address to SRO. SRO will conduct reminder calling with an estimated 300 cases for each wave of data collection.</p> <p>This budget assumes an overall SRO involvement period of 20 months commencing in March 2024 with the data collections taking place during a 4-month period (for each wave), beginning in May 2024 (for Wave 1) and May 2025 (for Wave 2).</p>		
SRO Project Period	12/2023 - 12/2025		
Data Col Period	04/2024 - 08/2025		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Rebecca Gatward (SPA), Donnalee Grey-Farquharson (Lead), Hueichun Peng, Shaowei Sun, Hongyu Johnson, Brad Goodwin, Edward Green		
Other Project Name			
Sample Mgmt System	Web SMS		
Data Col Tool	Other (Qualtrics)		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	ISR Group (MTF Staff)		
Payment Type	Other (Tango Card)		
Payment Method	Other (Post (by MTF Staff))		

Report Period	Dec, 2023 (MTF Early Panel Pilot)		Initiation
Risk Level	On Track		
Monthly Updates	1. Project Management -Worked with the MTF study team on testing the survey forms (both survey forms and specs forms) via Qualtrics. -Created a sample release schedule 2. Web SMS -Worked with MTF study team on connecting Qualtrics and Web SMS. -Started Web SMS programming		
Special Issues			

Cost as of Dec 31, 2023	Total Cost to Date (direct + indirect):			1,638.45
	Est Cost at Completion (E\$AC):			34,709.99
	Total Budget:			288,529.00
	Variance (Total Budget minus- E\$AC):			253,819.01
	Reason for Variance:			Only December 2023 was projected. Projections will be entered/updated in January.
Projections as of Dec 31, 2023	Dollars Projected for Month:			2,131.55
	Actual Dollars Used:			1,638.45
	Variance (Projected minus Actual):			493.10
	Reason for Variance:			Not everyone charged as projected because some work moved into January.
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	Megan Patrick (UM-SRC)		
Investigator/Clients			
Funding Agency			
IRB	HUM#: 00217920		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	<p>This project is a continuation of MTF Illume Web 2021.</p> <p>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.</p>		
SRO Project Period	01/2022 - 03/2027		
Data Col Period	04/2022 - 10/2026		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Rebecca Gatward (SPA), Donnalee Grey-Farquharson, Lloyd Hemingway, Dave Dybicki, Max Malholtra, Hueichun Peng, Shaowei Sun, Peter Sparks, Ashwin Dey, Hongyu Johnson, Brad Goodwin, Edward Green.		
Other Project Name	MTF		
Sample Mgmt System	Web SMS		
Data Col Tool	Other (Qualtrics)		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	ISR Group (MTF Staff)		
Payment Type	Check, prepaid; Check, post		
Payment Method	Other (MTF Staff handles this)		

Report Period	Dec, 2023 (MTF Panel 2022-27)		Implementing
Risk Level	On Track		
Monthly Updates	1. Management - Tested Qualtrics surveys (for production 2024) 2. System - completed updating 2023 Web SMS specification document. - Started to program Web SMS for 2024 production 3. Web Data Collection - N/A 4. Winter Location -N/A 5. NR Production/Calling-N/A 6. RLM: n/A		
Special Issues			

Cost as of Dec 31, 2023	Total Cost to Date (direct + indirect):	1,233,073.29
	Est Cost at Completion (E\$AC):	3,867,806.52
	Total Budget:	3,895,217.00
	Variance (Total Budget minus- E\$AC):	27,410.48
	Reason for Variance:	The total project amount includes MTF Web Illume as well as Non-Response Calling and Winter Location project. WL projections are to be updated.

Projections as of Dec 31, 2023	Dollars Projected for Month:	35,140.04
	Actual Dollars Used:	23,301.75
	Variance (Projected minus Actual):	11,838.29
	Reason for Variance:	The total project amount includes MTF Web Illume as well as Non-Response Calling and Winter Location project. WL projections are a bit off and will be adjusted.

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	<div><div>Pre Production Start: 10/01/2021</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start:</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End:</div></div>		
Other Project Team Members	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	Dec, 2023 (PR-PSID)		Implementing
Risk Level	Some Concerns		
Monthly Updates	<p>Pretest recruitment concluded on 12/22 -- ETI completed 122 recruitment surveys. 2 of the surveys were invalid and were removed from the sample. SRO will release all 120 pretest SIDs at Prod Launch. SRO and PIs determined contact protocol for the pretest -- priority is to complete 75 interviews and not to test the recruitment strategy so we will be loading the contact information we obtained during recruitment in SurveyTrak, and will reach out via phone and email, even though we will not have this information available during main data collection.</p> <p>SRO and PIs began initial discussion on pretest data out process. The project will need to determine a bilingual resource that can review the data. SRO will reach out to PSID data extraction staff to begin learning about their</p>		

data extraction process.

PR-PSID leads met with PI and Blaise programmers to begin planning for the PR-PSID and Core instrument integration. Goal is for the instruments to be integrated in time for PR-PSID to go into production in the Spring of 2025 with all of the Core 25 updates.

SRO worked with ETI to develop plan for advance mailing. SRO provided ETI with laptop loading instructions. ETI purchased the ghost image. ETI confirmed the training venue. Training dates remain unchanged. SRO is continuing to focus on training material development and translation.

Special Issues	Timeline concerns -- Timeline contingent on: training materials development and translation. Slight overrun. Much of the Post Collection Processing that is planned is new for SRO.			
Cost as of Jan 16, 2024	Total Cost to Date (direct + indirect):			520,304.37
	Est Cost at Completion (E\$AC):			1,344,857.50
	Total Budget:			1,292,585.00
	Variance (Total Budget minus- E\$AC):			-52,272.50
	Reason for Variance:	Projected cost to complete increased by ~1.7k between Nov & Dec -- mostly due to increasing hours for the ST programmer, and data managers.		
Projections as of Jan 16, 2024	Dollars Projected for Month:			28,000.64
	Actual Dollars Used:			25,146.46
	Variance (Projected minus Actual):			2,854.18
	Reason for Variance:	Underrun mainly due to lower actuals in the tech categories. Projections were increased and pushed forward.		
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	<p>TAS 2023 is the 10th Wave of TAS study, part of the PSID Suite of projects.</p> <p>Approximately 3,000 youth aged 18 - 28 years who are part of families who participate in the ongoing Panel Study of Income Dynamics (PSID) are invited to take part in a 60-minute web survey. In 2023, all respondents go through the same sequential treatment - non-responders to web survey are called as part of the non-response follow up. Respondents will be offered a up to \$145 for completing the interview which includes a \$75 base payment and possible other interventions. Phone interviews will be completed by Survey Research Center Survey Services Lab (SSL) interviewers.</p>		
SRO Project Period	05/2023 - 07/2024		
Data Col Period	10/2023 - 05/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 05/01/2023 Pretest End: Staffing Complete: SS Train Start: 10/02/2023 DC Start: 10/03/2023 </div> <div> Pretest Start: Recruitment Start: 07/23/2023 GIT Start: 10/03/2023 SS Train End: 10/06/2023 DC End: 05/31/2023 </div> </div>		
Other Project Team Members	PSID Suite SRO Lead - Shonda Kruger-Ndiaye; TSG Tech Leads - Jim Rodgers, Laura Yoder, and Jeff Smith; Data Manager - Rose Zybel; Blaise Programmer - Youhong Liu; Portal - Jude Perillo MSMS Programmers - Pam Swanson and Darnell Christian; Help Desk Support - Kyle Goodman; Testing Coordinator - Camila Kendall; Project/Production Support - Jaime Koopman, Sarah Crane, Xiomara Lorenzo-Guerra & Liliana Grueber; 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	Dec, 2023 (PSID TAS 2023)		Implementing
Risk Level	On Track		
Monthly Updates	Summary of December Activities Staffing and Training -No interviewer attrition from the October training. - Weekly TL training to ensure the team has the skills needed in reporting and data collection systems. - Training 1 interviewers received Non-Response calling training on 11/27. This protocol will begin on 12/4. - Training preparations continue to bring on an additional 23 interviewers. GIT training takes place on December 1. Study specific training takes place, in person, from December 4 through December 6. Four additional hours of training was added to training to account for 20 new hires and additional protocols (non-response calling) the project is completing.		

Technical

- Data Model 3 was released on 11/27. This update includes a new identity question along with a U-M required ePayment routing change. Extensive testing by both the IDPM (PSID Staff) and SRO teams occurred prior to this release.
- The team prepped and released Rel2 on 11/30. As with Rel1 sample was loaded into the system with Respondent profiles loaded after to ensure a timely release.
- Continue to monitor the Communication Sequence protocol closely. Monitoring occurs in PQT and as adjustments need to be made, the project either manually resets cases or requests data manager assistance if the Sequence itself needs to be updated.

Production

- TAS is off to a strong start with 70% response rate for Rel1.
- Respondents are receiving sequenced (planned) system emails and iwer sent text messages. Message frequency is ~2X a week.
- WSO started for Rel 1began on 11/14 with all Interim cases being offered \$85 (\$75 + \$10) until 12/3. Due to a slow uptick in interviews, the TOA was increased to \$95 (\$75 + \$20) for all cases. The boost coincided with a fall message going out to all cases on 11/22.
- Other current R protocols include: locating, assigned sample (respondents without a cell and email), and suspend follow up.

Management

- Working with PSID Core to identify TAS and PSID SAL overlap to reduce CP/R burden where both project's protocols are occurring at the same time. Project change considerations include holding TAS sample until active Saliva protocol is complete and/or prioritizing TAS cases on Saliva.
- Developing a winter postcard that will include a small monetary TOA (likely \$2).

Special Issues

Cost as of Jan 18, 2024	Total Cost to Date (direct + indirect):	562,186.28
	Est Cost at Completion (E\$AC):	1,358,461.61
	Total Budget:	1,457,428.00
	Variance (Total Budget minus- E\$AC):	98,966.39
	Reason for Variance:	Interviewer hours were not carried over to account for the actual expected interviewer hours through the end of data collection. Expect further mailing projections to be added once final release numbers are provided at the end of January 2024.
Projections as of Jan 18, 2024	Dollars Projected for Month:	134,762.35
	Actual Dollars Used:	136,884.31
	Variance (Projected minus Actual):	-2,121.96
	Reason for Variance:	Actual interviewer hours were slightly more than projected.

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	(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	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name	Amish study		
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Not used		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
=====			
Report Period	Dec, 2023 (QoL & Hearing Loss)		Closing
Risk Level	On Track		
Monthly Updates	Revised questionnaire delivered and clinicians used it at the December community clinic. No additional work expected at this time.		
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:		Project hours direct billed to Michigan Medicine shortcode
Projections as of	Dollars Projected for Month:		0.00
	Actual Dollars Used:		0.00
	Variance (Projected minus Actual):		0.00
	Reason for Variance:		None

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

Project Name	(SAME) Skills Assessments Mode Evaluation Study (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	<p>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.</p>		
SRO Project Period	02/2023 - 12/2023		
Data Col Period	06/2023 - 10/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	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 (\$35 or \$65); Cash, post (\$35 or \$65); Other (PCG one-time TOA)		
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox)		

Report Period	Dec, 2023 (SAME)		Closing
Risk Level	On Track		

Monthly Updates

Project Management:
-Finalized the costs for the final cost report.
-Finalized the Project Final Report for delivery

Technical System Development and Testing/Training:
- N/A

Interviewer Hiring & Training
- N/A

Production: Completed production successfully on 10/19/2023

Hardware:
- Transferred ownership of 19 tablets and 17 headsets to the CDS project team
- Transferred ownership of 7 external PC monitors to DCO team

Special Issues		
Cost as of Dec 31, 2023	Total Cost to Date (direct + indirect):	297,122.57
	Est Cost at Completion (E\$AC):	297,138.17
	Total Budget:	302,327.00
	Variance (Total Budget minus- E\$AC):	5,188.83
	Reason for Variance:	Projected cost to complete decreased by ~\$600 between the November and December cost reports. The biggest driver of this decrease is a decrease in the telephone recharges non-salary category. There will not be any expenses after 12/2023.
Projections as of Dec 31, 2023	Dollars Projected for Month:	4,716.28
	Actual Dollars Used:	3,740.56
	Variance (Projected minus Actual):	975.72
	Reason for Variance:	The small amount of underrun was mainly due to a decrease in the respondents/subjects non-salary category as well as the credit in the telephone non-salary category. There will not be any expenses after 12/2023.

Measures		Units at Complete	RR	HPI
	Current Goal:	280	100	
	Goal at Completion:	240	100	
	Current Actual:	249	89%	
	Estimate at Complete:	240		
	Variance:	9		

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	<p>The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations.</p> <p>The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 600 interviews.</p>		
SRO Project Period	01/2023 - 12/2023		
Data Col Period	12/2022 - 12/2023		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: 12/27/2022</div><div>Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 12/20/2023</div></div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; Desktop; [UM cell] Phone		
DE Software	NA		
QC Recording Tool	DRI-CXM		
Incentive	Not used		
Administration	N/A		
Payment Type	N/A		
Payment Method	N/A		
=====			
Report Period	Dec, 2023 (SCA 2023)		Closing
Risk Level	On Track		
Monthly Updates	SCA December 2023 started as planned on SUN 11/19/23, and ended two days earlier than planned on FRI 12/15/23. 600 interviews were completed (326/173/101) meeting the overall goals (though ahead of RDD and R12 goals, but short of RECON6 goals - this was anticipated and approved by the PIs prior to the end of data collection for the month). HPI was 3.45 for the month (higher than both the budgeted HPI of 3.2 as well as the projected HPI of 3.0). The further we are removed from the worst of the COVID-19 pandemic contact rates continue to decrease, resulting in higher HPI.		
Special Issues			
Cost as of Jan 18, 2024	Total Cost to Date (direct + indirect):		1,296,377.80
	Est Cost at Completion (E\$AC):		1,298,610.63
	Total Budget:		1,332,352.00

Reason for Variance:	Due to increased attrition and increasing HPI a large additional training was needed in December; combined they are the primary drivers of the decrease in the expected underrun for CY 2023.
----------------------	---

Projections as of Jan 18, 2024 Dollars Projected for Month:	108,044.94
---	------------

Actual Dollars Used:	137,694.77
----------------------	------------

Variance (Projected minus Actual):	-29,649.83
------------------------------------	------------

Reason for Variance:	Due to increased attrition and increasing HPI a large additional training was needed in December; combined they are the primary drivers of the decrease in the expected underrun for CY 2023.
----------------------	---

Measures		Units at Complete	RR	HPI
	Current Goal:	600		3.2
	Goal at Completion:	600		3.2
	Current Actual:	600		3.45
	Estimate at Complete:	600		3.45
	Variance:	0		+.45

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	<div><div>Pre Production Start: 09/01/2022</div><div>Pretest End:</div><div>Staffing Complete: 04/10/2023</div><div>SS Train Start: 05/18/2023</div><div>DC Start: 05/30/2023</div></div> <div><div>Pretest Start:</div><div>Recruitment Start: 02/01/2023</div><div>GIT Start: 05/16/2023</div><div>SS Train End: 05/25/2023</div><div>DC End: 12/31/2024</div></div>		
Other Project Team Members	Taghreid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall		
Other Project Name	Social Relations 2022, DAWN, Social Relations 2023		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	DRI-CARI		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Cash, prepaid (\$75 respondent, \$25 informant); Other (\$2 screener incentive)		
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)		

Report Period	Dec, 2023 (SRS 2021)	Implementing
Risk Level	Attention!	
Monthly Updates	<p>The Social Relations Study continues to be well behind schedule in terms of completing screeners and cases. As of Nov 30, 2023, the project had expensed 34% of its total direct cost budget while only completing 13% of its budgeted interviews. Hours per screener are far higher than were budgeted, and the project continues to be hampered by excessive attrition, resulting in far fewer interviewer hours than needed to support the level of production needed. As of 1/22/2024, the project has only completed 564 interviews, compared to roughly 2765 expected interviews for the same time period. The project has finalized 2167 screener lines compared to roughly 5175 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 130 minutes (compared to 140 budgeted) and saliva cooperation is around 84% (slightly higher than budgeted).</p> <p>Screening continues to be very difficult, with some areas being very hostile to minority interviewers (or to any</p>	

interviewers). Several serious field incidents have been reported in the last several weeks. Eight experienced interviewers were trained and added to the DAWN projects in early December (4 travelers, 4 local). We had hoped that adding experienced interviewers would help boost our capacity and increase productivity. Unfortunately only one of the travelers has agreed to return to work in Detroit after the first of the year, and the project has experienced additional unplanned attrition in December and January.

We presented the financial and production status to the PIs in September, in early November, and again in January. We have been and continue to be very clear that the project is in financial trouble and they will not achieve the budgeted number of interviews without significant additional funding (including highlighting this in monthly reports). The PIs have asked for financial projections for the cost of completing the full data collection given current field conditions. We are working with DMSS to review sample projections and prepare ballpark estimates. The PIs intend to present the current situation and funding needed to the program officer (no date planned for this).

Projections for the study have been reviewed and revised. Since production is low, we are not spending at the rate that had been anticipated, and this will allow us to extend the production period. The PIs approved (and welcomed) extending the production period, and also approved moving forward with the release of the panel sample.

In addition, the PIs approved launching another interviewer recruitment & training effort. We will attempt to hire 25 screeners, which will allow the current team of interviewers to focus on fulfilling appointments for interviews. This is a lower-cost method of expanding interviewing capacity. If new hires work out, and if the study obtains more funding, the screeners will be offered the opportunity to train on the full study protocol.

Special Issues		We have been keeping the dire financial situation of the study in front of the PIs as frequently as possible, including revising the monthly activity report to emphasize the financial and production situation. The PIs acknowledged the poor study outcomes in January and asked for updated projections to present to the program officer. NOTE: 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.		
Cost as of Jan 18, 2024	Total Cost to Date (direct + indirect):	2,268,539.72		
	Est Cost at Completion (E\$AC):	5,880,011.93		
	Total Budget:	5,876,610.11		
	Variance (Total Budget minus- E\$AC):	-3,401.82		
	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 Jan 18, 2024	Dollars Projected for Month:	361,411.58		
	Actual Dollars Used:	283,807.51		
	Variance (Projected minus Actual):	77,604.07		
	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 have just adjusted all projections downward to more closely match expected production. We have also extended the data collection period, since we are not spending funds as was originally planned.		
Measures		Units at Complete	RR	HPI
	Current Goal:	3644	88% scr, 75% main	10.4 with screening
	Goal at Completion:			
	Current Actual:	564	23% scr, 48% main	20.9 with screening
	Estimate at Complete:			
	Variance:			
Other Measures		RR shown above reflect completion based on the released sample. Current length 129 minutes, budgeted 140 minutes. Saliva participation rate is 84%, budgeted at 80%		

Project Name	(STARRS-LS VA HEARTH) STARRS-LS VA - Housing, Employment, Assessment Risk, Transitions, Help (HEARTH) Project Qualitative Interviews (On Track)		
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: Derek Dubuque Senior Project Advisor: Lisa S Holland Production Manager 1: Meredith A House Production Manager 2: Austin De Spirito		
Proposal #	no data		
Description	<p>The STARRS-LS collaboration with VA HEARTH (Housing Employment Assessment Risk Transitions Help) Qualitative Interviews is part of a larger project led by STARRS site principal investigator, Dr. Ron Kessler, at the Harvard Medical School (HMS). The Army Study to Assess Risk and Resilience in Servicemembers (STARRS) is a long-term prospective study (funded so far for close to 15 years) of risk and protective factors for suicidal behaviors among US Army soldiers and, in recent years, Veterans who were soldiers at the beginning of the study. One line of research in STARRS has been the development of machine learning models using information obtained while soldiers were still on active duty to predict homelessness after becoming a Veteran. The HMS STARRS team developed successful models of this sort and published the results. These publications came to the attention of VHA leadership, who approached the HMS STARRS team to establish a collaboration to use these models to target recently separated Veterans for intensive transitional services interventions designed to prevent homelessness. As part of the larger project, the HMS STARRS team will be updating the risk prediction models to be created based on a short set of self-report questions that could be embedded into a participant intake form. This intake form can then be used by VA HEARTH social workers in new samples of transitioning service members (TSMs) (not the STARRS-LS respondents) to determine which TSMs are at high risk of post-separation homelessness.</p> <p>The STARRS models were developed by working with a sample of approximately 15,000 STARRS survey respondents who were interviewed initially when they were on active duty and then followed and reinterviewed after they became Veterans. Several hundred of these STARRS Veterans became homeless after separation. A second aspect of the research is for 50-100 of these Veterans to be recruited to participate in a follow-up focused qualitative interview designed to elicit information about the ways VA might be able to improve transitional services for soldiers at high risk of homelessness after leaving active service and becoming Veterans. With a subcontract from HMS, the U-M Survey Research Center (SRC) Survey Research Operations (SRO) will recruit STARRS-LS respondents for the qualitative interviews, carry out the interviews, transcribe and de-identify the interviews, and link the de-identified/coded interview transcripts to existing de-identified/coded survey data files for these respondents. The HMS STARRS team will then carry out content analysis of these transcripts to elicit information that might help the VA HEARTH team further design their interventions.</p>		
SRO Project Period	05/2023 - 02/2024		
Data Col Period	10/2023 - 02/2024		
Security Plan	Yes		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Meredith House - STARRS LS Survey Director Margaret Hudson - Project Manager Derek Dubuque - Scheduler Austin De Spirito - Interview Redaction and QC 4 temp research technicians hired for qualitative interviews 4 Survey Techs assisting with interview facilitation		
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	Dec, 2023 (STARRS-LS VA HEARTH)		Implementing	
Risk Level	On Track			
Monthly Updates	<p>December was a busy and productive month for HEARTH! Our new production manager, Derek Dubuque, was onboarded and has been an amazing addition to the team. Additionally we brought on 4 field staff to help with facilitating the interviews (hosting Zoom, introducing the IW and gaining consent, recording the IW, and saving a transcript). The HEARTH interviewers worked to add schedule flexibility as their semester wrapped up. The combination of these things allowed us to more rapidly sent invitations to Soldiers to participate and get them scheduled and interviews completed more quickly. As a result, we were able to complete 26 interviews in December (14 IWs had been completed Oct-Nov).</p> <p>We continue to experience high no show rates (respondents not showing up to their scheduled appointments). However, about 1/3 of these respondents rescheduled for a new time.</p> <p>The final ~100 invitations will be sent over the first two weeks of January.</p> <p>Nancy S, Katie, Jenny, Margaret, and Meredith met mid-month to plan for the contract ending at the end of February 2024.</p> <ul style="list-style-type: none">• We decided we can continue interviews through mid-February.• We will complete all redactions by the end of February. If the students are unable to complete all coding, Katie and Jenny will complete the coding on Harvard server.• We discussed the possibility of giving redacted transcripts to Brian Marx at the VA and determined that, while it would be possible to do so after anonymizing the transcripts by stripping the IDs, it is preferable to share only the coded interviews and recommendations. <p>We continue review transcripts and redact PII. Redacted transcripts are then securely transferred to Harvard weekly. As of the end of December, 13 redacted transcripts had been transferred to Harvard. The student interviewers are getting started on coding the interviews, so no coded transcripts have been sent yet.</p>			
Special Issues				
Cost as of Jan 18, 2024	Total Cost to Date (direct + indirect):		42,833.25	
	Est Cost at Completion (E\$AC):		72,942.88	
	Total Budget:		89,942.00	
	Variance (Total Budget minus- E\$AC):		16,999.12	
	Reason for Variance:	Fewer completed interviews overall		
Projections as of Jan 18, 2024	Dollars Projected for Month:		17,919.39	
	Actual Dollars Used:		15,252.04	
	Variance (Projected minus Actual):		2,667.35	
	Reason for Variance:	Not all facilitator hours for December are processed, nor respondent incentives for all December IWs. Project management hours were less than projected.		
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 Investigator/Clients	James Wagner (University of Michigan) Robert Ursano (Uniformed Services University of the Health Science) Murray Stein / Ron Kessler (University of California San Diego / Harvard)		
Funding Agency	Department of Defense		
IRB	HUM#: HUM00180765	Period of Approval: 4/5/23 - 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	<p>This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.</p> <p>For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data.</p> <p>To date, we have completed 2 waves of STARRS-LS interviewing. During Wave 1, we attempted to contact 50,000 individuals and completed approximately 14,500 full interviews. All Wave 1 participants that completed a full Wave 1 interview were asked to participate in Wave 2. Waves 3 and 4, which are covered in this application, will include the full STARRS-LS Wave 2 sample, regardless of whether they completed the interview.</p> <p>In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys).</p>		
SRO Project Period	05/2020 - 04/2025		
Data Col Period	11/2022 - 04/2024		
Security Plan	Yes		
Milestones	<div> <div> Pre Production Start: 04/01/2022 Pretest End: Staffing Complete: 10/01/2022 SS Train Start: 11/14/2022 DC Start: 11/07/2022 </div> <div> Pretest Start: Recruitment Start: 07/23/2022 GIT Start: SS Train End: 11/17/2022 DC End: 04/15/2024 </div> </div>		
Other Project Team Members	Ryan Yoder, Keith Liebetreu, Becky Loomis, Steven Sonoras, 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	Dec, 2023 (STARRS-LS Waves 3 & 4)	Implementing
Risk Level	On Track	

Monthly Updates	<p>Project Management and Planning:</p> <ul style="list-style-type: none"> ? 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 final Year 3 progress report and cost table, accounting for the no cost extension (through August 31, 2023), were sent to USUHS on December 12. ? Year 5 budget: <ul style="list-style-type: none"> o Meredith created detailed budget line calculations for the Year 5 budget and sent them to USUHS on December 18. We were asked to provide detail for all lines over \$5K. Additionally, we provided details/calculations for all rates even if they were under \$5K. o We provided additional information about Wave 5 costs in Year 5 to aid USUHS in responding to Scott's December 11 email asking the research team for a more detailed budget estimate on behalf of the GSC Executive Council. ? IRB: There was no IRB activity in December. ? STARRS-affiliated, but not STARRS funded, work: <ul style="list-style-type: none"> o VA/HEARTH project: <ul style="list-style-type: none"> ? As of January 3, 41 interviews had been completed and 3 more had been scheduled. • We did not interview December 24-25 or December 31-January 1. Otherwise, we had appointment availability each day during the holiday break. The schedule for the week between the holidays (Dec 26-Dec 30) was finalized on December 22. There were 9 appointments scheduled during this time. • No additional invitations were sent December 17-30 so that we could finalize the interview schedule over the holiday break. We will resume sending invitations in January. • We continued to experience high no show rates (respondents not showing up to their scheduled appointments). Between December 17 and 30, we completed 10 interviews from 27 scheduled appointments. However, 5 of the 17 respondents who did not show rescheduled for a new time. • Where we have permission to text, we continued implementing text reminders (in addition to email reminders) to respondents for their upcoming appointments. ? As of the end of December, 13 redacted transcripts had been transferred to Harvard. The student interviewers were just getting started on coding the interviews, so no coded transcripts have been sent yet. ? A meeting was held December 13 with Nancy, Katie, Jenny, Margaret, and Meredith to plan for the contract ending at the end of February 2024. • We decided we can continue interviews through mid-February. • We will complete all redactions by the end of February. If the students are unable to complete all coding, Katie and Jenny will complete the coding on Harvard server. • We discussed the possibility of giving redacted transcripts to Brian Marx at the VA and determined that, while it would be possible to do so after anonymizing the transcripts by stripping the IDs, it is preferable to share only the coded interviews and recommendations. <p>Enclave and User Support:</p> <ul style="list-style-type: none"> ? Annual DoD security training: We continued to receive completed training renewal materials from Enclave users. The final completion due date is January 31. ? Annual IA security review: <ul style="list-style-type: none"> o Marcus and Meredith attended the initial review call on December 4 with M&RA, AAG, and USUHS representatives. A follow-up call was held on December 7 to resolve a few in-depth requirements. o U-M produced vulnerability scans and worked on gathering documents for AAG. All items will be sent to AAG together in January. o M&RA said their in-person visit has moved to February 5-6. U-M shared the last in-person agenda with M&RA so we can begin to develop the agenda for their 2024 visit. ? 2023 repeat NDI search: <ul style="list-style-type: none"> o We completed adjudication of duplicate records and CDC-identified "true match (assumed dead)" cases that have a possibility of not being deaths, then began final processing steps. We are planning late January 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: <ul style="list-style-type: none"> o We planned for the upgrade of the primary Windows Enclave server which will take place next month. o Eleven high priority construct files were transferred from AAG to U-M. Two of the files were posted to the Enclave on December 15 and nine were posted on December 22. o We tracked progress on DUAs for two new VA fellows so they may obtain Enclave access. The DUAs were under review with HJF. ? Biomarker group request for assistance: <ul style="list-style-type: none"> o Dr. Stein contacted the Enclave team to inquire about the feasibility of sending new variables to the Psychiatric Genomics Consortium (PGC) server. The team replied confirming the transfer is feasible and provided the additional information needed by the UCSD team to carry it out. This transfer will require U-M staff to convert source file IDs to PGC-IDs prior to delivery. <p>Public Use Data:</p> <ul style="list-style-type: none"> ? Biosample flags, administrative variables, and inventory document: <ul style="list-style-type: none"> o Final documentation of blood flag and administrative data variable descriptions underwent additional edits after review by research team members and was approved by the PIs. o We worked toward a delivery of biosample flag and administrative data materials to ICPSR by mid-January. o ICPSR updated their budget for the work taking place later than originally planned; their updated budget had dates of January-September 2024. We asked if the work could still be done in 3 months as originally planned. They said they can commit to end of May 2024 and will try to have it done sooner if possible. This should still work for our target of 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 January 5, 2025, are as follows:

- o Replicates released: 13 of 14 released with 13,559 sample lines.
- o Completed interviews: 9,299 (8,751 web; 548 phone).
- o During the month, Replicate 11 transitioned from Phase 3 to Phase 4. As of January 5, the response rate was 70.9%. Replicate 11 had lost 2 days of calling due to the Thanksgiving holiday and was also behind due to the two days that were added to Replicate 10, but CATI completes started to rebound by late December-early January.
- o Replicate 12 transitioned from Phase 2 to Phase 3 mid-December. As of January 5, the response rate was 47.0% and tracking about 7 percentage points below the average rate. Replicate 12 was trending behind due to lost calling days during the December holidays and focused effort on Replicate 11.
- o Replicate 13 was released on Tuesday, January 2, with letters mailed to 752 participants. As of January 5, we had received 2 completed surveys and the response rate was 0.3%.
- o The response rate for completed replicates (Reps 1-10) is 75.5%.

Safety Plan Results:

? The Wave 4 Safety Plan rate is 12.6% as of January 5.

Special Issues	No changes this month to the areas of risk and mitigation strategies.		
Cost as of Nov 30, 2023	Total Cost to Date (direct + indirect):		9,646,256.31
	Est Cost at Completion (E\$AC):		12,597,322.04
	Total Budget:		12,889,590.00
	Variance (Total Budget minus- E\$AC):		292,267.96
	Reason for Variance:	In projections updates, about \$20K of Rpay costs were moved forward, and the final November cost report projected underrun is \$292,268, which is about the same as last month. Note this projected underrun is before adding in the costs for starting Wave 5.	
Projections as of Nov 30, 2023	Dollars Projected for Month:		303,316.30
	Actual Dollars Used:		276,128.22
	Variance (Projected minus Actual):		27,188.08
	Reason for Variance:	Underspending in November was in Rpay and small amounts across various tasks and and salary lines. Cumulatively, we have spent about \$29K less in Rpay than projected, so we move \$20K in Rpay projections forward.	

Measures		Units at Complete	RR	HPI
	Current Goal:	10,800	75	10.2
	Goal at Completion:	10,800	75	10.2
	Current Actual:	9,299	75.5 (Reps 1-10)	12.2
	Estimate at Complete:	10,800	75	12
	Variance:	0	0	-1.8

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	Nov	Dec
<i>TSME24 DCO System Support (483248)</i>	Initiatives	Implementing	Vivienne Y Outlaw												
<i>TSME24 MSMS performance work (425267)</i>	Initiatives	Initiation	Jim Rodgers												
<i>TSME24 MSMS Working Group (425197)</i>	Initiatives	Initiation	Kelly A Chatain												
<i>TSME24 QC Systems (483249)</i>	Initiatives	Implementing	Sarah Elisa Broumand												
<i>TSME24 SRO System Maintenance - General (483910)</i>	Initiatives	Implementing	Jeffrey L Smith												
<i>TSME24 SSL Autoscheduler interface development (42</i>	Initiatives	Implementing	Debbie Seale												
<i>TSME24 STRak: Migration to SQL Anywhere V17 (</i>	Initiatives	Initiation	Lawrence Daher												

Project Name	(TSME24 DCO System Support (483248)) TSME24 DCO System Support (483248) (Some Concerns)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 35,000.00	Indirect Budget: 0.00	Total Budget: 35,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Vivienne Y Outlaw		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	To be determined		
SRO Project Period	07/2023 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Dec, 2023 (TSME24 DCO System Support (483248))	Implementing	
Risk Level	Some Concerns		
Monthly Updates	1. V called a meeting with Wen and Hueichun to layout the technical specs of the TeamTailor Geocoding process: we wish to have candidates address downloaded from TeamTailor and have 2 HomeAreas geocoded. 2. Hueichun and Shaowei worked on the data Download via TeamTailor API. 3. Hueichun and Shaowsei worked on the data upload (HomeArea, HomeAreaName, Driving time, Driving distance) via TeamTailor. API. There are 2 different methods to upload the data. If there has been ever data in those designated customized fields in TeamTailor, we need to use PATCH API. If there is none, we use POST API. This difference added extra complexity to our download job as we need to run extra API to check if the job candidate has an existing ID associated with the data.		
Special Issues			
Cost as of Jan 18, 2024	Total Cost to Date (direct + indirect):	8,841.05	
	Est Cost at Completion (E\$AC):	31,749.15	
	Total Budget:	35,000.00	
	Variance (Total Budget minus- E\$AC):	3,250.85	
	Reason for Variance:	Pending costs related to the implementation of a new ATS. We are still working on the integration of FRED with TeamTailor.	

Projections as of Jan 18, 2024		Dollars Projected for Month:		2,213.36
		Actual Dollars Used:		1,008.62
		Variance (Projected minus Actual):		1,204.74
		Reason for Variance: Delay in the start of mapping and reporting for new ATS, TeamTailor		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures	x			

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	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
=====			
Report Period	Dec, 2023 (TSME24 MSMS Working Group)		Initiation
Risk Level	On Track		
Monthly Updates	No work done this month. Kelly Chatain worked on related initiative for the MSMS Onboarding materials.		
Special Issues			
Cost as of Jan 18, 2024	Total Cost to Date (direct + indirect):		1,937.10
	Est Cost at Completion (E\$AC):		10,180.63
	Total Budget:		15,000.00
	Variance (Total Budget minus- E\$AC):		4,819.37
	Reason for Variance:		No work completed this month.
Projections as of Jan 18, 2024	Dollars Projected for Month:		1,373.92
	Actual Dollars Used:		0.00
	Variance (Projected minus Actual):		1,373.92
	Reason for Variance:		No work completed this month.

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	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
=====			
Report Period	Dec, 2023 (TSME24 QC Systems (483249))		Implementing
Risk Level	On Track		
Monthly Updates	Focusing on planning for future Olive developments and integration of the new BackUp for OLIVE Systems (Cheng Zhou). Continued work on adding more features to reporting and QC Dashboard. Automated delivery of Dashboard on a weekly basis including a worksheet reporting on HPE. OLIVE team also working with projects to troubleshoots issues with TAS and adjust ODS accordingly.		
Special Issues			
Cost as of Jan 09, 2024	Total Cost to Date (direct + indirect):		12,072.25
	Est Cost at Completion (E\$AC):		48,664.68
	Total Budget:		49,500.00
	Variance (Total Budget minus- E\$AC):		835.32
	Reason for Variance:		minimal cost variance
Projections as of Jan 09, 2024	Dollars Projected for Month:		2,579.08
	Actual Dollars Used:		2,956.35
	Variance (Projected minus Actual):		-377.27
	Reason for Variance:		minimal variance

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

Project Name	(TSME24 SRO System Maintenance - General (483910)) TSME24 SRO System Maintenance - General (483910) (On Track)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 1.00	Indirect Budget: 0.00	Total Budget: 1.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Jeffrey L Smith		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	Pending input from Manager		
SRO Project Period	07/2023 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div>Pre Production Start:</div> <div>Pretest End:</div> <div>Staffing Complete:</div> <div>SS Train Start:</div> <div>DC Start:</div> </div> <div> <div>Pretest Start:</div> <div>Recruitment Start:</div> <div>GIT Start:</div> <div>SS Train End:</div> <div>DC End:</div> </div>		
Other Project Team Members			
Other Project Name			
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	Dec, 2023 (TSME24 SRO System Maintenance - General (483910))		Implementing
Risk Level	On Track		
Monthly Updates	Finished TSG Surveytrak slides for Carol Added SurveyTrak code to Git along with documentation PB/ST Meetings (this time includes time for Marsha, Pam, Ashwin, Jeff and Holly)		
Special Issues	No issues		
Cost as of Jan 11, 2024	Total Cost to Date (direct + indirect):	16,653.39	
	Est Cost at Completion (E\$AC):	26,181.15	
	Total Budget:	1.00	
	Variance (Total Budget minus- E\$AC):	-6,181.15	
	Reason for Variance:	See below	
Projections as of Jan 11, 2024	Dollars Projected for Month:	1,587.96	
	Actual Dollars Used:	2,582.40	
	Variance (Projected minus Actual):	-994.44	
	Reason for Variance:	See below	

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

Project Name	(TSME24 SSL Autoscheduler interface development (42) TSME24 SSL Autoscheduler interface development (423463) (On Track)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 5,000.00	Indirect Budget: 0.00	Total Budget: 1.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Debbie Seale		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1: Elizabeth Ohryn		
	Production Manager 2:		
Proposal #	no data		
Description	Continued development and implementation of the SSL autoscheduler. Two primary components are outstanding: 1) Interface for SSL staff to be able to load and complete the initial scheduling run without the assistance of DMSS; 2) Implementation of a "freeze and re-run" protocol. The focus in this fiscal year will be on the freeze and re-run protocol, which allows us to optimize shift assignments. Getting the first part set up to allow SSL staff to run the scheduling process independently of DMSS will take additional programming effort.		
SRO Project Period	07/2023 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Wen Chang; Hueichun Peng; Ji Qi		
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Dec, 2023 (TSME24 SSL Autoscheduler	Implementing	
Risk Level	On Track		
Monthly Updates	We are on track to start an excel prototype of the interface in the next few weeks with a R Shiny application to follow after that test.		
Special Issues			
Cost as of Jan 19, 2024	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 Jan 19, 2024	Dollars Projected for Month:	0.00	
	Actual Dollars Used:	0.00	

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

Project Name	(TSME24 STrak: Migration to SQL Anywhere V17 () TSME24 STrak: Migration to SQL Anywhere V17 (483227) (Some Concerns)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 10.00	Indirect Budget: 0.00	Total Budget: 10.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Lawrence Daher		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	To be defined		
SRO Project Period	07/2023 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div>Pre Production Start:</div> <div>Pretest End:</div> <div>Staffing Complete:</div> <div>SS Train Start:</div> <div>DC Start:</div> </div> <div> <div>Pretest Start:</div> <div>Recruitment Start:</div> <div>GIT Start:</div> <div>SS Train End:</div> <div>DC End:</div> </div>		
Other Project Team Members			
Other Project Name			
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	Dec, 2023 (TSME24 STrak: Migration to SQL Anywhere V17 (483227) (Some Concerns)		Initiation
Risk Level	Some Concerns		
Monthly Updates	Third party software installed - done SQL Anywhere 17 installed - done Database created - done, but questions about configuration Data load - done RDP to test server created: \\SRC-Douvan\SRO\groups\TSG\tsprog\sysprog\SHARE\DBA Activities\RDPs\Test server (STdbtest01).rdp User ID: STDevAdmin or each person's ISR AD user Password: In password safe, same as STDevAdmin or user's PlanB password SAS connection tested by Paul Burton SQLA11 database copied to ST-Classic, Problem: Unable to start the database. Error: "Transaction log not found" Fix: Edit server configuration and remove reference to mirror log Client ODBC 32 bit created Testing PC created RDP to test PC: \\SRC-Douvan\SRO\groups\TSG\tsprog\sysprog\SHARE\DBA Activities\RDPs\Test PC (sro2tsz).rdp SRSM copied, ini file edited Removed spaces from folder names on D: Corrected names in Server config, tSystem_Codes, SRSM INI file, ODBC Remote service created Server administrator - STtestAdmin created, UAC lowered on SRSM folder		

Batch file(s) edited:
database backup - full (untested)
database backup - incremental (untested)
Remote service start (untested)
Remote service stop (untested)
Check if a service is running (untested)
SRSM edited (untested)
Further batch file edits
Joe - waiting for response to server name change, SRSM rights, share to d:\temp
FTP server is in place
Are there set up/configuration/installations that need to be done?
Can we test before a laptop is set up? How?
Conversation with Lishwu about replication

Next steps:
Batch files called by SRSM edits: server service names, paths, ODBC, etc
ST Admin (add DSN to .INI)
Server administrator - access rights to folders (granted as needed)
ODBC 64 bit for desktop clients
Enable remote service (possible problems if there are no remote users)
Extract a remote database
Laptop or desktop testing: Send/Receive, File Transfer, DRI, etc.
Create an updated database schema (see action item)

Special Issues			
Cost as of Jan 16, 2024	Total Cost to Date (direct + indirect):		2,773.89
	Est Cost at Completion (E\$AC):		19,256.02
	Total Budget:		10.00
	Variance (Total Budget minus- E\$AC):		10,743.97
	Reason for Variance:		
Projections as of Jan 16, 2024	Dollars Projected for Month:		2,747.02
	Actual Dollars Used:		1,124.97
	Variance (Projected minus Actual):		1,622.05
	Reason for Variance:		

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

Other Measures