*Survey Research Operations*

*Monthly Project Report*

*Sponsored Data Collection Projects and Development Initiative*

*February 2024*

# Sponsored Data Collection Projects and Development Initiative Projects

(ANES 2024) American National Election Studies - 2024

(BFY) Baby's First Years

(BHM Library Project) Developing a Model of Black History Month Programming in Public Libraries

(CAMS 2023) HRS 2023 Consumption and Activity Mail Study

(Care & Help Study) Caregiving, Complex Family and Kinship Ties, and Alzheimer's Disease and Related Dementias (ADRD)

(CARE Military) Concussion Assessment, Research and Education (CARE) Consortium 2022 - Military

(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022

(CCS) Community College Survey

(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

(NDWS) National Dementia Workforce Study

(PR-PSID) Puerto Rico Panel Study of Income Dynamics

(PSID CDS 2023) PSID Childhood Development Supplement 2023

(PSID TAS 2023) Transition to Adulthood within its Life Course & Intergenerational Family Context

(PSID23) Panel Study of Income Dynamics Core 2023

(SCA 2024) Surveys of Consumer Attitudes

(SRS 2021) Social Relations 2023

(STARRS-LS VA HEARTH) STARRS-LS VA - Housing, Employment, Assessment Risk, Transitions, Help (HEARTH) Project Qualitative Interviews

(STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study

(TSME24 DCO System Support (483248)) TSME24 DCO System Support (483248)

(TSME24 MSMS performance work (425267)) TSME24 MSMS performance work (425267)

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

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

(TSME24 SRO System Maintenance - General (483910) ) TSME24 SRO System Maintenance - General (483910)

(TSME24 SSL Autoscheduler interface development (42) TSME24 SSL Autoscheduler interface development (423463)

(TSME24 STrak: Migration to SQL Anywhere V17 () TSME24 STrak: Migration to SQL Anywhere V17 (483227)

# Sponsored Projects Dashboard

## NonArchived Sponsored Projects

| Project | Type | Phase | Project Lead | Jan | Feb |
|---|---|---|---|---|---|
| ANES 2024 | Sponsored | Implementing | Andrew L Hupp | 🟡 | 🟡 |
| BFY | Sponsored | Implementing | Piotr Dworak | 🟢 | 🟢 |
| BHM Library Project | Sponsored | Implementing | Karin Schneider | 🟡 | 🟡 |
| CAMS 2023 | Sponsored | Implementing | Gloria J Baker | 🟢 | 🟢 |
| Care & Help Study | Sponsored | Implementing | Margaret Lee Hudson | 🟢 | 🟢 |
| CARE Military | Sponsored | Implementing | Donnalee Ann Grey-Farquharson | 🟢 | 🟢 |
| CARE SALTOS MTEC | Sponsored | Implementing | Donnalee Ann Grey-Farquharson | 🟢 | 🟢 |
| CCS | Sponsored | Implementing | Jeffrey Albrecht Jr | 🟡 | 🟢 |
| EDC-Endline | Sponsored | Closing | Karin Schneider | 🟢 | 🟢 |
| HCAP 2022 | Sponsored | Implementing | Maureen Joan O'Brien | 🟢 | 🟢 |
| Health and Well Being in SE MI | Sponsored | Implementing | Barbara Lohr Ward | 🔴 | 🔴 |
| HRS 2022 Panel & Baselines | Sponsored | Implementing | Evanthia Leissou | 🟢 | 🟡 |
| HRS 2024 | Sponsored | Planning | Evanthia Leissou | 🟡 | 🟡 |
| HRS HOC | Sponsored | Planning | Gloria J Baker | 🟡 | 🟡 |
| HRS2022-Screening | Sponsored | Implementing | Evanthia Leissou | 🟡 | 🟡 |
| IHDS3 | Sponsored | Implementing | Sarah Elisa Broumand | 🟢 | 🟢 |
| LHMS 2023 Fall | Sponsored | Implementing | Gary Hein | 🟢 | 🟢 |
| LHMS 2023 Spring | Sponsored | Implementing | Gary Hein | 🟢 | 🟢 |
| MI CReSS (Year 3 & 4) | Sponsored | Implementing | Timothy Prand | 🟡 | 🟢 |
| MTF Base Year 2022_27 | Sponsored | Implementing | Rebecca Gatward | 🟢 | 🟢 |
| MTF Early Panel Pilot | Sponsored | Initiation | Donnalee Ann Grey-Farquharson | 🟢 | 🟢 |
| MTF Panel 2022-27 | Sponsored | Implementing | Donnalee Ann Grey-Farquharson | 🟢 | 🟢 |
| NDWS | Sponsored | Initiation | Margaret Lee Hudson | ☐ | 🟢 |
| PR-PSID | Sponsored | Initiation | Camila Kendall | 🟡 | 🟡 |
| PSID CDS 2023 | Sponsored | Implementing | Piotr Dworak | 🟢 | 🟢 |
| PSID TAS 2023 | Sponsored | Implementing | Elizabeth Ohryn | 🟢 | 🟢 |
| PSID23 | Sponsored | Implementing | Rachel Anne Orlowski | 🟢 | 🟡 |
| SCA 2024 | Sponsored | Initiation | Theresa Camelo | 🟢 | 🟢 |
| SRS 2021 | Sponsored | Implementing | Barbara Lohr Ward | 🔴 | 🟢 |
| STARRS-LS VA HEARTH | Sponsored | Closing | Margaret Lee Hudson | 🟢 | 🟢 |
| STARRS-LS Waves 3 & 4 | Sponsored | Implementing | Meredith A House | 🟢 | 🟢 |

| Project Name | (ANES 2024) American National Election Studies - 2024 (Some Concerns) | | |
|---|---|---|---|
| **Project Mode** | Primary: Web      Secondary: Face to Face      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#:* HUM00226016 | | *Period of Approval:* Study is exempt |
| **Project Team** | *Project Lead:* Andrew L Hupp | | |
| | *Budget Analyst:* William Lokers | | |
| | *Production Manager:* Theresa Camelo | | |
| | *Senior Project Advisor:* Grant D Benson | | |
| | *Production Manager 1:* Margaret Lavanger | | |
| | *Production Manager 2:* Lisa Van Havermaet | | |
| **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.<br><br>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:* 03/01/2024 | *Pretest Start:* |
|---|---|
| *Pretest End:* | *Recruitment Start:* |
| *Staffing Complete:* | *GIT Start:* 07/10/2024 |
| *SS Train Start:* 07/11/2024 | *SS Train End:* |
| *DC Start:* 08/01/2024 | *DC End:* 12/31/2024 |

| | |
|---|---|
| **Other Project Team Members** | Erin McSpadden - Project Manager for the methods pilot<br>Sharon Parker - Production Manager for the methods pilot<br>Raphael Nishimura - Sampling (pilot and production)<br>Paul Burton - Sampling and Reporting<br>Makenna Harrison - Sampling and Reporting<br>Marsha Skoman - SurveyTrak programming + Tech Lead<br>Karl Dinkelmann - Blaise oversight + Tech Lead<br>James Rodgers - MSMS + Tech Lead<br>Ashwin Dey - WebTrak<br>Pam Swanson - MSMS set-up programming<br>Sarah Broumand - PQT and QC set-up<br>Peter Sparks - Blaise programming<br>Max Malhotra - Blaise programming<br>Youhong Liu - Blaise programming<br>Jude Perillo - Login portal<br>Hueichun Peng - Self-scheduler<br>Tony Romanowski - Technical specifications and testing<br>Andrew Piskorowski - ODS |
| **Other Project Name** | |
| **Sample Mgmt System** | SurveyTrak; MSMS |
| **Data Col Tool** | Blaise 5; Other (PAPI) |
| **Hardware** | Laptop; [UM cell] Phone; Paper and Pencil |
| **DE Software** | External vendor (DataForce) |
| **QC Recording Tool** | Camtasia |
| **Incentive** | Yes, R |
| **Administration** | SRO Group |
| **Payment Type** | Check, post ($25/$40 Escalation to $100); Cash, prepaid ($5/$10); Cash, post (Pre-Election token amount) |
| **Payment Method** | Interviewer payment of cash (reimbursed/reconciled via Tenrox) |

-----------------------------------------------------------------------------------------------

| | | |
|---|---|---|
| **Report Period** | Feb, 2024 (ANES 2024) | Implementing |

| | |
|---|---|
| **Risk Level** | Some Concerns |

| | |
|---|---|
| **Monthly Updates** | Pilot: The remaining two interviewers sent in the questionnaires they were holding. Those have been data entered. |
| | Main: There is a weekly meeting with project staff (Matt D. and Dave H.). Sampling has selected the 60 PSUs. Andrew has passed those on the DCO so they can use that information for recruiting. It will be a few weeks before we have segments. PSUs in most cases will work, as PSUs are generally a county. There are a few PSUs that are groups of counties linked together. In those areas we will need to be more strategic about where we will hire. Each PSU will have four segments with 11 selected lines, and one PSU with six segments. Andrew is in the process of estimating the numbers of interviewers we will need to recruit. The initial assumptions are likely a little low, but using current attrition levels is likely too high given the number of lines in each PSU (mostly 44 lines). Two people in some PSUs is too many. Andrew will share his estimates with SRO Admin soon. |
| | A project kick-off meeting was held on 3/18. Andrew had a follow-up meeting with TSG Admin to answer some questions they had. Once Andrew has estimated the number of staff to recruit he will begin working on a detailed production workflow. He's already begun documenting questions for project staff to think through and provide responses. |
| | Lisa VH is working on timeline revisions with input from Grant and Andrew. Andrew is drafting a memo to SRO Admin about the budget. Some of the initial assumptions haven't held and will have an impact on the budget. |
| | SRO delivered a budget for added work scope, the Household Member Survey (HMS). The research team will likely approve the spouse/partner model. The HMS will be administered on the web (likely as part of the screener, or a separate instrument), or via a paper questionnaire that is mailed to the household (web) or left behind (in-person). |
| | SRO will also likely prepare a budget to equip field interviewers with equipment (i.e., an additional monitor) for the post-election interviews done via video. Project staff wanted to talk more about this before we prepared a budget. If SSL staff does some/all of the video interviews the budget would be unnecessary. Andrew has talked with project staff about this (having at least a portion of video interviews done via the SSL). They were receptive to the idea. We will also be proposing that we offer video to all in-person pre-election respondents, rather than a random half. |

| | |
|---|---|
| **Special Issues** | |

| **Cost as of Mar 20, 2024** | **Total Cost to Date (direct + indirect):** | 75,093.79 |
|---|---|---|
| | **Est Cost at Completion (E$AC):** | 6,698,360.27 |
| | **Total Budget:** | 7,024,812.00 |
| | **Variance (Total Budget minus- E$AC):** | 125,952.73 |
| | **Reason for Variance:** | Updated costs for main project. TSG projections have been moved over from the sandbox. It should be noted that the budget in CRS contains the ~$275,000 allocated for non-response follow-up. The PIs decided to not do the NRFU. They reallocated a portion of those funds for the pre-test we did over the summer. costs (other than Blaise programming are not projected yet). Andrew spoke with the research team about this and will schedule a meeting between SRO and CPS to straighten this out. The CPS person is out for the next few weeks. Pilot costs are below.

Total Cost to Date: $184,346.47
Estimated cost at completion: $184,667.01
Total Budget: $211,899.00
Variance: $27,231.99

The current remaining projections are for Kelly C. We may also use those funds if needed on the main project. |

| **Projections as of Mar 20, 2024** | **Dollars Projected for Month:** | 78,029.64 |
|---|---|---|
| | **Actual Dollars Used:** | 33,666.13 |
| | **Variance (Projected minus Actual):** | 44,363.51 |
| | **Reason for Variance:** | Some of the unused hours were pushed forward. In a few instances they weren't due to staff being spilt across projects. |

| **Measures** | | **Units at Complete** | **RR** | **HPI** |
|---|---|---|---|---|
| | **Current Goal:** | 6,636/5,807 | 55%/88% | |
| | **Goal at Completion:** | | | |
| | **Current Actual:** | | | |
| | **Estimate at Complete:** | | | |
| | **Variance:** | | | |

| | |
|---|---|
| **Other Measures** | |

| | |
|---|---|
| **Project Name** | **(BFY) Baby's First Years (On Track)** |
| **Project Mode** | Primary: Face to Face    Total of Modes: 1 |
| **Project Type** | Sponsored Projects |
| **Budget** | **Direct Budget**: 6,593,681.00    **Indirect Budget:** 2,106,680.73    **Total Budget:** 8,700,361.73 |
| **Principal** | Dr. Greg Duncan (University of California - Irvine) |
| **Investigator/Clients** | Dr. Kimberly Noble (Teachers College Columbia University) |
| | Dr. Katherine Magnuson (University of Wisconsin) |
| **Funding Agency** | National Institute of Child Health and Human Development (NICHD) |
| **IRB** | ***HUM#:*** HUM00137963       ***Period of Approval:*** |
| **Project Team** | ***Project Lead:*** Piotr Dworak |
| | ***Budget Analyst:*** Janelle P Cramer |
| | ***Production Manager:*** Veronica Connors-Burge |
| | ***Senior Project Advisor:*** Stephanie A Chardoul |
| | ***Production Manager 1:*** Margaret Lavanger |
| | ***Production Manager 2:*** Michelle Smith |
| **Proposal #** | no data |
| **Description** | University of Michigan Survey Research Center (U-M SRC) is contracted to recruit and interview participants for Baby's First Years -- a longitudinal randomized control trial study. |
| | The study's full name, listed on sub-contract documents, is Household Income and Child Development in Early Years.  The study will draw on a convenience sample of mothers and their newborns in four US metropolitan areas: New York City; Omaha/Lincoln; New Orleans; and Minneapolis.  One or two hospitals, listed in this application, will be used as recruiting sites in each area.  The study uses a randomized control trial design in which low-income mothers and newborns will be randomly assigned to a treatment group that receives an unconditional income enhancement -- cash payments of $333 per month—an amount roughly comparable to a variety of income assistance policies in the U.S. and shown to be associated with meaningful improvements for poor children in prior studies—or to a control condition that receives $20 per month. In both groups, the payments will be made for the first 40 months of the child's life.  To understand the impacts of added income on children's development, researchers will assess treatment/control group differences at ages 1, 2 and 3 on measures of cognitive, language, memory, self-regulation and socio-emotional development.  Recruitment is scheduled to start in April of 2018, and each follow-up interview will be conducted 12 months later -- close in time to the child's 1st, 2nd, and 3rd birthday. The feasibility of the approach has been established in a one-year pilot conducted in 2014 at the New York Presbyterian Hospital/Columbia University Medical Center. |
| | The Principal Investigators are Dr. Greg Duncan from University of California Irvine (UCI), Dr. Kimberly Noble from Teacher's College Columbia University (TCCU), and Katherine Magnuson from University of Wisconsin-Madison (UWM).  UCI (Dr. Duncan) and TCCU (Dr. Noble) are the institutions and signatories funding the U-M SRC subcontract from various sources including the National Institute for Child Health and Human Development (NICHD) and private foundations listed in this application. The study research team also includes co-investigators Lisa Gennetian (New York University), and Hiro Yoshikawa (New York University). |
| | SRO will be responsible for four interactions with the selected mothers/infants:<br>• Baseline will occur immediately (within 24-48 hours) after birth, in the hospital;<br>• Wave 1 will be a telephone interview with the mother when the child is 12 months old;<br>• Wave 2 will be an in-person interview in the family's home that includes survey, developmental assessment, biomarker collection, and video recorded behavioral interaction when the child is 24 months old;<br>• Wave 3 will be an in-person survey done while the mother and child are visiting a lab for other clinical tests when the child is 36 months old. |
| | Each data collection phase/wave will be a full 12 months, with Baseline starting in April 2018: |
| | Recruitment/Baseline: 04/01/2018 - 03/31/2019<br>        Wave 1: 04/01/2019 - 03/31/2020<br>        Wave 2: 04/01/2020 - 03/31/2021<br>        Wave 3: 04/01/2021 - 03/31/2022 |
| **SRO Project Period** | 10/2017 - 12/2020 |
| **Data Col Period** | 04/2018 - 12/2020 |
| **Security Plan** | NA |

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

| | |
|---|---|
| **Other Project Team Members** | Stephanie Chardoul (SPA) |
| | Piotr Dworak (Lead) |
| | Tony Romanowski (PM) |
| | Daric Thorne (PM/SSA) |
| | Barb Homburg (PM) |
| | Peggy Lavanger (PM) |
| | Jim McClure (DCS) |
| | Jeff Smith (tech lead) |
| | Jim Rodgers (MSMS consultant) |
| | Andrew Hupp (MSMS consultant) |
| | Pam Swanson (MSMS programmer) |
| | Kyle Kwaiser (Data Manager) |
| | Dave Dybicki (Blaise) |
| | Colette Keyser (Blaise) |
| | Tricia Blanchard (MSMS) |
| | Kyle Goodman (Help Desk) |
| **Other Project Name** | HHICD Household Income and Childhood Development |
| **Sample Mgmt System** | MSMS |
| **Data Col Tool** | Blaise 5 |
| **Hardware** | Laptop; [UM cell] Phone |
| **DE Software** | N/A |
| **QC Recording Tool** | Other (to be specified) |
| **Incentive** | Yes, R |
|    **Administration** | SRO Group |
|    **Payment Type** | Cash, prepaid (50) |
|    **Payment Method** | Check through other system (MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (MSMS) |

--------------------------------------------------------------------------------------------

| | | |
|---|---|---|
| **Report Period** | Feb, 2024 (BFY) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | BFY Age 5- 8: | |

BFY has awarded SRO continuing work throughout Age 8 (August 2027).  We are currently conducting a one-time Age5 Catch Up activity re-contacting all Rs who completed Age 4 Lab Visit but have not had their contact information updated since.

We were able to re-contact close to 80% of respondents after the Age 4 visits.  Respondents harder to re-contact report having issues with the Lab communication protocols during Age 4 and being under the assumption the study is done.  PIs had sent a data collection update / newsletter to address this issue.

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

Age 6:  Conversations continue about the Age 6 protocol.  SRC recommended to re-convene a March meeting to discuss the protocol and the cost with the PIs. Currently, our assistance with Age 6 lab visit could cover contact updates but not conducting interviews which is one of the scope items floated by the PIs.  We may also revisit our data management staffing needs depending on the frequency and manner in which the sample is transferred from SRC to the PIs sample management system.

Age 5 Staffing:

We continue to retain the BFY Age 3 staff.

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

Technical system:
Due to MSMS programming bottleneck BFY is just now implementing the desired system changes to run the midwave process.  We are still resorting to manual sample management until programmers free up.

Finances:
We continue having an underrun within the Age 5 - 8 budget.

| | | |
|---|---|---|
| **Special Issues** | | |
| **Cost as of Mar 19, 2024** | *Total Cost to Date (direct + indirect):* | 7,628,261.33 |
| | *Est Cost at Completion (E$AC):* | 8,650,520.02 |
| | *Total Budget:* | 8,700,361.73 |

| | Variance (Total Budget minus- E$AC): | | | 49,841.71 |
|---|---|---|---|---|
| | Reason for Variance: | We continue to project underrun, however, some of our tech dev work was delayed due to MSMS programming demands across SRO. | | |
| Projections as of Mar 19, 2024 | Dollars Projected for Month: | | | 21,251.03 |
| | Actual Dollars Used: | | | 27,029.15 |
| | Variance (Projected minus Actual): | | | -5,778.12 |
| | Reason for Variance: | We started some tech development which was projected earlier in the budget but was sidelined as PSID Core, CDS, and TAS required most MSMS resources. | | |

| Measures | | Units at Complete | RR | HPI |
|---|---|---|---|---|
| | Current Goal: | n/a | n/a | n/a |
| | Goal at Completion: | n/a | n/a | n/a |
| | Current Actual: | n/a | n/a | n/a |
| | Estimate at Complete: | n/a | n/a | n/a |
| | Variance: | | | |

**Other Measures**

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

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

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

-----------------------------------------------------------------------------------------------

| Report Period | Feb, 2024 (BHM Library Project) | Implementing |
|---|---|---|
| Risk Level | Some Concerns | |
| Monthly Updates | Pilot 1 is finally winding down.  PI has agreed to do convenience sample for Pilot 2. | |
| Special Issues | None -- March is the month where Wen's hours will show up, may need to adjust based on that. | |
| Cost as of Mar 08, 2024 | *Total Cost to Date (direct + indirect):* | 73,786.34 |
| | *Est Cost at Completion (E$AC):* | 188,171.82 |
| | *Total Budget:* | 197,671.00 |
| | *Variance (Total Budget minus- E$AC):* | 9,499.18 |
| | *Reason for Variance:* | Slight overrun, but have not engaged in some of the analysis we are projected to do.  That will eat up some of the budget. |
| Projections as of Mar 08, 2024 | *Dollars Projected for Month:* | 10,457.26 |

| | | | |
|---|---|---:|
| *Actual Dollars Used:* | | 10,294.83 |
| *Variance (Projected minus Actual):* | | 162.43 |
| *Reason for Variance:* | For once, we did a better projection. | |

**Measures**

| | | Units at Complete | RR | HPI |
|---|---|---|---|---|
| | *Current Goal:* | 170 | 30% | |
| | *Goal at Completion:* | 170 | 30 | |
| | *Current Actual:* | 170 | | |
| | *Estimate at Complete:* | 170 | | |
| | *Variance:* | | | |

**Other Measures**

---

**Other Measures**

| Project Name | (CAMS 2023) HRS 2023 Consumption and Activity Mail Study (On Track) | | |
|---|---|---|---|
| Project Mode | Primary: Mail     Total of Modes: 1 | | |
| Project Type | Sponsored Projects | | |
| Budget | **Direct Budget**: 347,895.00 | **Indirect Budget:** 125,241.00 | **Total Budget:** 473,136.00 |
| Principal Investigator/Clients | David Weir | | |
| Funding Agency | | | |
| IRB | *HUM#:* HUM00079949 | | *Period of Approval:* 11/4/2022-11/3/2023 |
| Project Team | *Project Lead:* Gloria J Baker | | |
| | *Budget Analyst:* Cindy Tsao | | |
| | *Production Manager:* | | |
| | *Senior Project Advisor:* Evanthia Leissou | | |
| | *Production Manager 1:* Jennifer C Arrieta | | |
| | *Production Manager 2:* | | |
| Proposal # | no data | | |
| Description | CAMS is part of the Health and Retirement Study (HRS). The goal of CAMS is to gather additional data on household consumption and activities of daily living from participants in the HRS.  In 2023, a paper questionnaire will be mailed to approximately 6,427 respondents of which 4,646 will receive the full questionnaire and 1,781 spouse/partners will receive a brief questionnaire. | | |
| SRO Project Period | 06/2023 - 05/2023 | | |
| Data Col Period | 09/2023 - 04/2005 | | |
| Security Plan | NA | | |

| Milestones | *Pre Production Start:* 06/26/2023 | *Pretest Start:* |
|---|---|---|
| | *Pretest End:* | *Recruitment Start:* |
| | *Staffing Complete:* | *GIT Start:* |
| | *SS Train Start:* | *SS Train End:* |
| | *DC Start:* 10/04/2023 | *DC End:* 04/30/2024 |

| Other Project Team Members | HRS Budget Analyst: Rick Krause<br>Data Manager: Ed Green, Jennie Williams<br>Programmer: Ashwin Dey<br>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 | Feb, 2024 (CAMS 2023) | Implementing |
|---|---|---|
| Risk Level | On Track | |
| Monthly Updates | During the month of February, the team worked on<br>1. Logging and shipping SAQs to be scanned and then delivered to HRS staff.<br>2. Remailing questionnaires to respondents due to address error on a priority envelope.<br>3. 4,174 CAMS lines have been finalized of which 3,633 have completed the questionnaire. The current response rate is 56%.<br>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: 158 remails were sent from final mailing to Mar 19. | |
| Cost as of Mar 19, 2024 | *Total Cost to Date (direct + indirect):* | 406,680.72 |
| | *Est Cost at Completion (E$AC):* | 367,206.00 |
| | *Total Budget:* | 473,136.00 |

|  | **Variance (Total Budget minus- E$AC):** | | 105,930.00 |
|---|---|---|---|
|  | **Reason for Variance:** | The variance is primarily due to staff assigned to the project compared to budgeted resources. The project is also achieving a slightly lower response rate which impacts logging hours, check voids, etc. | |
| **Projections as of Mar 19, 2024** | **Dollars Projected for Month:** | | 6,199.12 |
|  | **Actual Dollars Used:** | | 5,458.24 |
|  | **Variance (Projected minus Actual):** | | 740.88 |
|  | **Reason for Variance:** | Minimal variance. | |

| **Measures** | | **Units at Complete** | **RR** | **HPI** |
|---|---|---|---|---|
|  | **Current Goal:** | 3,792 | 59% | |
|  | **Goal at Completion:** | 3,792 | 59% | |
|  | **Current Actual:** | 3,632 | 58% | |
|  | **Estimate at Complete:** | 3,727 | 58% | |
|  | **Variance:** | 65 | 1% | |

**Other Measures**

| Project Name | (Care & Help Study) Caregiving, Complex Family and Kinship Ties, and Alzheimer's Disease and Related Dementias (ADRD) (On Track) | | |
|---|---|---|---|
| Project Mode | Primary: Focus Group    Secondary: Cognitive IW    Total of Modes: 2 | | |
| Project Type | Sponsored Projects | | |
| Budget | **Direct Budget**: 35,091.00 | **Indirect Budget:** 7,545.00 | **Total Budget:** 42,636.00 |
| Principal Investigator/Clients | Sarah E. Patterson (University of Michigan - Survey Research Center) | | |
| Funding Agency | | | |
| IRB | *HUM#:* HUM00237431 | | **Period of Approval:** 7/6/2023-7/31/2024 |
| Project Team | *Project Lead:* Margaret Lee Hudson | | |
| | *Budget Analyst:* | | |
| | *Production Manager:* | | |
| | *Senior Project Advisor:* Lisa S Holland | | |
| | *Production Manager 1:* | | |
| | *Production Manager 2:* | | |
| Proposal # | no data | | |
| Description | Family and unpaid caregivers can influence the health and well-being of older adults through the care they provide and attitudes they hold about that care. However, the range of caregivers may extend beyond those most often captured in surveys (i.e. partners or adult children). Disadvantages may be especially present for older adults who have Alzheimer's Disease and Related Dementia (ADRD) who require more intensive and persistent care over time, and thusly rely on a more extended network of caregivers. This project seeks to enhance our understanding of diverse family and unpaid caregiver experiences and how this process may differ for those caring for an older adult living with dementia. This project will conduct focus groups with two groups of caregivers who help someone with memory issues, with 8 to 10 participants each. | | |
| SRO Project Period | 07/2023 - 07/2024 | | |
| Data Col Period | 07/2023 - 07/2024 | | |
| Security Plan | NA | | |

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

| | |
|---|---|
| Other Project Team Members | Focus group phase (7/23-10/23): Margaret Hudson<br>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 | Feb, 2024 (Care & Help Study) | Implementing |
|---|---|---|
| Risk Level | On Track | |
| Monthly Updates | The last 2 of 4 additional focus groups were hosted in February (2/4/24 & 2/11/24). The additional focus groups each target a specific type of caregiver (e.g., young caregivers) to better understand issues that arise for different kinds of caregivers. The PI and her research student are handling all recruitment. SRO is setting up the focus group space, facilitating the focus groups and providing audio recording and transcript (via Zoom), handling respondent payment, and debriefing with the PI on themes from each group.<br><br>The PI and project manager are working on a revised timeline for the cognitive interview phase of the project, now expected to start in April. | |
| Special Issues | | |
| Cost as of Mar 19, 2024 | *Total Cost to Date (direct + indirect):* | 5,373.04 |

|  | Est Cost at Completion (E$AC): | | | 29,650.35 |
|---|---|---|---|---|
|  | Total Budget: | | | 42,636.00 |
|  | Variance (Total Budget minus- E$AC): | | | 12,985.65 |
|  | Reason for Variance: | | | |
| Projections as of Mar 19, 2024 | Dollars Projected for Month: | | | 8,591.01 |
|  | Actual Dollars Used: | | | 2,475.90 |
|  | Variance (Projected minus Actual): | | | 6,115.11 |
|  | Reason for Variance: | | | |

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

| Project Name | (CARE 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** | Dr. Steven Broglio (U of M Kinesiology) | | |
| **Investigator/Clients** | 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** | 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.<br><br>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.<br><br>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.<br><br>The estimate total cost for the overall scope of work is $1,426,001.00. This includes $1,131,747.00 direct and $294,254.00 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders). | | |
| **SRO Project Period** | 02/2022 - 03/2023 | | |
| **Data Col Period** | 03/2022 - 08/2023 | | |
| **Security Plan** | NA | | |

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

| **Other Project Team Members** | Donnalee Grey-Farquharson, Barb Homburg, Hongyu Johnson, James Koopman, Keith Liebetreu, David Ackuaku, 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** | Feb, 2024 (CARE Military) | Implementing |
|---|---|---|
| **Risk Level** | On Track | |
| **Monthly Updates** | 1. Project Management: | |

- CARE PI have requested that SRO use/split funds currently assigned to working only the Civilian sample to also work the Military sample - and that we use both NCAA (PG -N034243 ) and DoD (PG -F063994) funds. To do this, new PGs are being created for military work - no percentage allotment was defined so SRO will spilt 50/50. The workscope adjustment with this request is that SRO aim to attain 7500 Civilian completions (instead of 7500 x 2) and 5000 military completions (instead of 5000 x 2). This workscope adjustment may shorten the field period but we understand that the CARE Consortium is seeking to attain additional funding to fulfill the original goals.
- There is no word regarding the System Programming ballpark. PI is aware that SRO requires a 9-12 month lead time to deliver. Realistically it seems this effort will come to SRO for the next data collection round/funding period.
-Worked with the PI team on the possible future Military project.
- Prepared the PI monthly report

2. Care SMS system: We will be receiving new sample

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 Feb 29, 2024** | *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:* | Currently the project is in hibernation until we have the further notice. The project closed on 8/31/2023. We have been adjusting some pending costs from previous months and the Civilian project. | | |
| **Projections as of Feb 29, 2024** | *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** | Dr. Steven Broglio (U of M Kinesiology) | | |
| **Investigator/Clients** | Dr. Michael McCrea (Medical College of Wisconsin) | | |
| | Dr. Thomas McAllister (Indiana University School of Medicine) | | |
| **Funding Agency** | | | |
| **IRB** | *HUM#:* 00202691 | | *Period of Approval:* 7/23/2021 - open |
| **Project Team** | *Project Lead:* Donnalee Ann Grey-Farquharson | | |
| | *Budget Analyst:* 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** | SRO will provide consultation, respondent locating activities and data collection for respondents in the longitudinal Concussion Assessment, Research and Education (CARE) study, with the goal of securing participation from 7,500 unique past-CARE study participants.  Participants will complete the same set of study assessments at two time points over the five-year project period.  The project follows collegiate athletes post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure. Specifically, SRO decentralized field interviewers will locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.

This budget assumes an overall SRO involvement period of approximately 44 months over two waves.  Wave 1 SRO involvement will begin in December 2021 with data collection taking place over approximately 12 months, beginning approximately May 2022.   Wave 2 SRO involvement will begin in November 2023 with data collection taking place over approximately 12 months starting in May 2024.

Currently, the total cost for the overall scope of work (based on the currently committed funding from all sources) is estimated at $4,685,914. This includes $3,718,978 direct and $966,936 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders).  As additional sources of funding are identified and those resources committed to SRO survey data collection activities, or inversely if a funder withdraws or reduces their level of funding to the project, the scope of work (e.g., the number of interviews to be collected) will increase or decrease respectively.

The estimate of funding contributed by the Department of Defense through the MTEC RFP is $2,277,689.  This includes $1,807,689 direct costs and $470,000 indirect costs budgeted at the 26% indirect cost rate.   The proposed period of support is September 1, 2021 through August 31, 2025. | | |
| **SRO Project Period** | 10/2021 - 08/2026 | | |
| **Data Col Period** | 03/2022 - 02/2026 | | |
| **Security Plan** | NA | | |

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

| **Other Project Team Members** | Donnalee Grey-Farquharson, Barb Homburg, Hongyu Johnson, Keith Leibetreu, 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** | Feb, 2024 (CARE SALTOS MTEC) | | Implementing |
| **Risk Level** | On Track | | |

| | |
|---|---|
| **Monthly Updates** | 1. Project Management:<br>- CARE PI have requested that SRO use/split funds currently assigned to working only the Civilian sample to also work the Military sample - and that we use both NCAA (PG -N034243 ) and DoD (PG -F063994) funds. To do this, new PGs are being created for military work - no percentage allotment was defined so SRO will spilt 50/50. The workscope adjustment with this request is that SRO aim to attain 7500 Civilian completions (instead of 7500 x 2) and 5000 military completions (instead of 5000 x 2). This workscope adjustment may shorten the field period but we understand that the CARE Consortium is seeking to attain additional funding to fulfill the original goals.<br>- There is no word regarding the System Programming ballpark. PI is aware that SRO requires a 9-12 month lead time to deliver. Realistically it seems this effort will come to SRO for the next data collection round/funding period.<br>-Management team has been continuously working with Datalys and QG along side with the PI  team on resolving ongoing technical issues while meeting with Datalys and QG every other week to review recorded bugs.<br>-SRO continued to work with the PI team to find solutions to resolve International TOA issues.<br>-The SRO management team worked with the PM and TLs on reviewing protocols with the interviewers.<br><br>2. CARE SMS system:<br>-The SRO field team has been facing many data collection challenges due to system issues.  The SRO management team continuously worked with Datalys and QG to triage and prioritize to get the issues fixed.<br><br>3. Questionnaire Development<br>- Tested logics of an additional Military Schooling section in CATI surveys for Datalys.<br><br>4. Production:<br>- The SRO field team successfully completed the production challenge "Valentine's Day Challenge." The data collection for DCP3 a month to end April 30 2024 reverted from May 31, 2024.<br>- Revisited field protocols with the interviewers.<br>- Stats: The field team completed cases average 40-50 cases per week in the past weeks. As of 02/29/2024 (Total Released samples = 15171 (DCP3)<br>   Total Completed Iws = 1592 (RR = 10.5%)<br>              Web = 1581<br>              CATI = 11<br>- Locating Team: continued to use social media platforms to find potential respondents. As of 02/29/2024,<br>     Total current tracking=688<br>            - Total found = 270<br>          - Total Completed = 15<br><br>5. DMSS:<br>- Setting up a new indicator variable and a new table for the second completes cases for better monitoring the productivity.<br><br>6. Hiring and Training<br>-one iwer was on a medical leave of absence starting Feb 2024 |

| | | |
|---|---|---|
| **Special Issues** | | |
| **Cost as of Feb 29, 2024** | *Total Cost to Date (direct + indirect):* | 2,029,474.39 |
| | *Est Cost at Completion (E$AC):* | 4,684,860.14 |
| | *Total Budget:* | 4,685,914.00 |
| | *Variance (Total Budget minus- E$AC):* | 1,053.86 |
| | *Reason for Variance:* | The budget is for the next two years (ending 2026).  We have been making adjustment to eliminate the overrun situations. |
| **Projections as of Feb 29, 2024** | *Dollars Projected for Month:* | 167,908.19 |
| | *Actual Dollars Used:* | 143,241.34 |
| | *Variance (Projected minus Actual):* | 24,693.85 |
| | *Reason for Variance:* | We made adjustments to eliminate the overrun situations. |

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

| Project Name | (CCS) Community College Survey (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:*** Ruth B Philippou | | |
| | ***Senior Project Advisor:*** Grant D Benson | | |
| | ***Production Manager 1:*** Rebecca Loomis | | |
| | ***Production Manager 2:*** Steven Sonoras | | |
| Proposal # | no data | | |
| Description | The CCS seeks to understand factors that influence first year community college students in their program choice. We will survey a selection of students entering a community college for the first time in the fall of 2023 and then follow up with them in the second semester (Spring 2024) and their third semester (Fall 2024). The researchers will recruit 4 community colleges to participate. | | |
| SRO Project Period | 01/2023 - 03/2025 | | |
| Data Col Period | 10/2023 - 11/2024 | | |
| Security Plan | NA | | |

| Milestones | ***Pre Production Start:*** | ***Pretest Start:*** |
|---|---|---|
| | ***Pretest End:*** | ***Recruitment Start:*** |
| | ***Staffing Complete:*** | ***GIT Start:*** |
| | ***SS Train Start:*** | ***SS Train End:*** |
| | ***DC Start:*** 03/11/2024 | ***DC End:*** 05/10/2024 |

| Other Project Team Members | Marsha Skoman - Qualtrics Programmer<br>Ed Green - Data Manager<br>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 | Desktop | |
| DE Software | NA | |
| QC Recording Tool | N/A | |
| Incentive | Yes, R | |
| Administration | SRO Group | |
| Payment Type | Cash, prepaid ($5); Cash, post ($40); Other  (Visa electronic gift cards, Amazon gift codes) | |
| Payment Method | Imprest Cash Fund from ISR Business Office; Other  (VISA eGift cards from HSIP, Amazon gift codes from Teachers Coll) | |

-----------------------------------------------------------------------------------------------------------

| Report Period | Feb, 2024 (CCS) | Implementing |
|---|---|---|
| Risk Level | On Track | |
| Monthly Updates | In February, the CCS team prepared for Wave 2 launch (scheduled for March 11).<br>- Hueichun finished setting up and testing Web SMS.<br>- Ed and Jennie created and loaded the preload.<br>- Marsha finished programming the survey in Qualtrics.<br>- Becky and Steven set up to process the Visa electronic gift card and cash TOAs. | |
| Special Issues | The PIs have agreed to send supplemental funds for the project. SRO was originally going to handle all TOAs. However, we were unable to offer Amazon gift codes, which the PIs insisted upon including. So, we are waiting to see how many of the TOAs they will purchase before we request the supplemental funds. | |
| Cost as of Mar 12, 2024 | ***Total Cost to Date (direct + indirect):*** | 350,386.48 |
| | ***Est Cost at Completion (E$AC):*** | 695,307.98 |

| | **Total Budget:** | | | 644,889.00 |
|---|---|---|---|---|
| | **Variance (Total Budget minus- E$AC):** | | | -50,418.98 |
| | **Reason for Variance:** | The current overrun is $50,418.98, which is down from last month due to projected token of appreciation costs being covered by Teachers College. They are purchasing the Amazon gift codes, which are currently about 25% of the requested TOAs. | | |
| **Projections as of Mar 12, 2024** | **Dollars Projected for Month:** | | | 92,630.75 |
| | **Actual Dollars Used:** | | | 25,258.20 |
| | **Variance (Projected minus Actual):** | | | 67,372.55 |
| | **Reason for Variance:** | CCS Wave 2 was originally planned to launch earlier, and the respondent payments that were slated for February were not moved to March. | | |

| **Measures** | | **Units at Complete** | **RR** | **HPI** |
|---|---|---|---|---|
| | **Current Goal:** | | | N/A |
| | **Goal at Completion:** | 3160 | 70% | N/A |
| | **Current Actual:** | 1398 | 31% | N/A |
| | **Estimate at Complete:** | | | N/A |
| | **Variance:** | | | N/A |

| **Other Measures** | U-M's Qualtrics license now includes features that estimate data quality, including flags for straightlining, missing data, and speeding. While this is often handled by researchers after data collection, SRO might consider using these indicators to inform consultation in survey design and production interventions. For example, 30/353 (8.5%) completed surveys had straightlining on > 80% of matrix items (28% straightlined on > 70% of items). |
|---|---|
| | This straightlining may be due in large part to the structure of the survey, e.g., there are 15 matrices in the survey and similar items (like belonging) are frequently lumped together. In other cases, respondent motivation may be low; however, the evidence does not seem to support that hypothesis at the moment. These respondents are not speeding and only about 2.5% are missing 10% or more data. We also have not observed a significant relationship between self-reported levels of motivation to participate in the study and straightlining. We will revisit this once we have more responses to increase analytic power. |

| | |
|---|---|
| **Project Name** | **(EDC-Endline) Every Dollar Counts Endline (On Track)** |
| **Project Mode** | Primary: Telephone    Secondary: Face to Face    Total of Modes: 2 |
| **Project Type** | Sponsored Projects |
| **Budget** | **Direct Budget**: 2,382,700.00    **Indirect Budget:** 714,811.00    **Total Budget:** 3,097,511.00 |
| **Principal** | Stephanie Chardoul (SRO) |
| **Investigator/Clients** | Sarah Miller (Ross Business School) |
| **Funding Agency** | |
| **IRB** | **HUM#:** HUM00164105                              **Period of Approval:** 12/23/2022-12/23/23 |
| **Project Team** | **Project Lead:** Karin Schneider |
| | **Budget Analyst:** Christine Evanchek |
| | **Production Manager:** Barbara Aghababian-Homburg |
| | **Senior Project Advisor:** Nicole G Kirgis |
| | **Production Manager 1:** Karin Schneider |
| | **Production Manager 2:** Donnalee Ann Grey-Farquharson |
| **Proposal #** | no data |
| **Description** | The overall project is funded by a consortium (currently consisting of both OpenResearch Lab (Open) and NIH. OpenResearch Lab (Open) (formerly Y Combinator Research) and the principal investigators are conducting an evaluation of Every Dollar Counts, a cash assistance gift program being administered by two non-profit organizations: CitySquare, based in Dallas, Texas, and Heartland Alliance, located in Chicago, Illinois (the Community Partners). |

The purpose of this study is to explore how the program affects multiple dimensions of recipients' lives. Key outcomes of interest include health, subjective and material well-being, time use, financial health, labor market participation, social and civic engagement, and effects on children. SRO concluded the Baseline interviews in 2020, and the Midline interviews in July 2022. The EDC Endline project will reach out to all Baseline respondents for completion of a telephone interview, followed by an in-person interview (with cognitive tasks, anthropometric measurements and collection of dried blood spots) for those respondents still in the greater Chicago area or greater Dallas/Ft. Worth area.  Data collection will take place between March 2023 and late September 2023. SRO assumes approximately 91% of the 2,990 Baseline respondents are located and willing to be interviewed again (2,720 90-minute telephone interviews).   SRO assumes that in-person interviews will be completed with 2,003 respondents still living in the greater Chicago or Dallas/Ft. Worth and Waco area. About 400 respondents are known to currently reside outside of these areas; these respondents will not be asked to complete an in-person interview.  The in-person interviews will include collection of consent for administrative data collection, collection of Social Security number, completion of self-administered on-line cognitive assessments, collection of blood pressure, height, weight, and dried blood spots. We assume that 1, 957 respondents will participate in the dried blood spot collection. Following collection of the dried blood spots, SRO interviewers will package and ship the dried blood spot cards to the laboratory chosen by ORL.
• Our budget assumes up to 2,720 telephone interviews are completed and allows for at least six telephone attempts on all non-resistant cases with working telephone numbers.   SRO will track and monitor contact attempts to examine the efficacy of contact windows in the first replicate of the sample.
• The budget assumes approximately 2,003 cases complete the in-person component and 1,957 consent to the DBS collection.
• Mileage costs for fieldwork are budgeted at 2,003 trips of no more than 120 miles per round trip.
• Cash incentives of $15,000 are included in the budget estimate to facilitate in-person payments to reluctant and hard-to-reach participants and individuals who are asked to assist in the location of these participants.  All other participant incentive payments are the responsibility of Open.
• Supplies/kits for DBS are included in the estimate consistent with our most recent project experience. Further discussion with the University of Washington laboratory may result in the refinement of the materials and method for drying the bio specimens and associated costs of project supplies.
SRO will conduct standard data cleaning and produce a preliminary and final dataset with documentation. Standard data cleaning does not include customization (such as derived variable or index creation, dataset merging, sample weighting, recoding, or coding of other-specify responses).  We will ensure that all components of a case are present with a reference variable (SID, OID) to allow for merging and data analysis.  Our main documentation is conveyed through data dictionaries and a questionnaire codebook.

We have not budgeted for coding any open-ended responses.

Deliverables:
• SRO will provide daily, automated delivery of questionnaire data, cognitive tasks, and sample management system data for cases with a final disposition and sample management system data for all cases that have been released to interviewers.
• Sample management data that will be delivered daily to Open will include the following case-level variables:
o Contact attempts
? number by type (SMS, phone, email, in-person)
? date/time of last attempt
o Appointments
? date/time of scheduled appointments
? occurrence of broken / missed appointments
? how appointment was made (self-scheduler/by interviewer)
o Current incentive assigned to the sample line
o SRO will work with Open during pre-production to finalize variables and format.
• We will work with Open between completion of active data collection and end of the funding period for Endline to reconcile any outstanding discrepancies in the data.
• SRO will also deliver:
o Daily data collection progress reports
o A final summary of field methods at the end of data collection
o A full survey dataset with all participant contact information at the close of data  collection.

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

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

| **Other Project Team Members** | In addition to the above:<br>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** | Feb, 2024 (EDC-Endline) | | Closing | |
|---|---|---|---|---|
| **Risk Level** | On Track | | | |
| **Monthly Updates** | Should not have any charges and our closing out. | | | |
| **Special Issues** | | | | |
| **Cost as of Mar 08, 2024** | *Total Cost to Date (direct + indirect):* | | | 1,202,892.37 |
| | *Est Cost at Completion (E$AC):* | | | 1,202,892.37 |
| | *Total Budget:* | | | 3,097,511.00 |
| | *Variance (Total Budget minus- E$AC):* | | | 1,894,618.63 |
| | *Reason for Variance:* | none | | |
| **Projections as of Mar 08, 2024** | *Dollars Projected for Month:* | | | 0.00 |
| | *Actual Dollars Used:* | | | 13.15 |
| | *Variance (Projected minus Actual):* | | | -13.15 |
| | *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 | **(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** | 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.<br><br>The respondent questionnaire length is expected to be 60 minutes. The informant questionnaire is expected to be 20 minutes and can be administered in-person after the R interview, or by telephone/mail if FTF is not available. | | |
| **SRO Project Period** | 01/2022 - 12/2023 | | |
| **Data Col Period** | 07/2022 - 11/2023 | | |
| **Security Plan** | NA | | |

| **Milestones** | **Pre Production Start:** 04/01/2022 | | **Pretest Start:** 05/01/2020 |
|---|---|---|---|
| | **Pretest End:** 05/21/2020 | | **Recruitment Start:** |
| | **Staffing Complete:** | | **GIT Start:** |
| | **SS Train Start:** 07/13/2022 | | **SS Train End:** 07/15/2022 |
| | **DC Start:** 07/18/2022 | | **DC End:** 11/30/2023 |

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

-----------------------------------------------------------------------------------------------------------

| **Report Period** | Feb, 2024 (HCAP 2022) | Implementing |
|---|---|---|
| **Risk Level** | On Track | |
| **Monthly Updates** | 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.<br><br>Very little account activity was recorded in February. | |
| **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 Mar 19, 2024** | **Total Cost to Date (direct + indirect):** | 4,820,836.76 |
| | **Est Cost at Completion (E$AC):** | 4,803,598.76 |

|  | Total Budget: |  | 4,787,168.00 |
|  | Variance (Total Budget minus- E$AC): |  | -16,430.76 |
|  | Reason for Variance: | There was a budget cap in 2020 while goals remained at high level, project has stretched 2 additional years with low level of management, inflation since budget created in 2018.  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 Mar 19, 2024 | Dollars Projected for Month: |  | -375.04 |
|  | Actual Dollars Used: |  | -72.09 |
|  | Variance (Projected minus Actual): |  | -302.95 |
|  | 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% | +.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 | Kristine Ajrouch (Life Course Development Program, SRC) | | |
| Investigator/Clients | Toni Antonucchi (Life Course Development Program, SRC) | | |
| | Laura Zahodne (Life Course Development Program, SRC) | | |
| Funding Agency | | | |
| IRB | *HUM#:* HUM00146040 | | *Period of Approval:* 4/9/2020 |
| Project Team | *Project Lead:* Barbara Lohr Ward | | |
| | *Budget Analyst:* Christine Evanchek | | |
| | *Production Manager:* Veronica Connors-Burge | | |
| | *Senior Project Advisor:* Nicole G Kirgis | | |
| | *Production Manager 1:* Taghreid Lovell | | |
| | *Production Manager 2:* Ian Ogden | | |
| Proposal # | no data | | |
| Description | Conduct 600 interviews with recently identified Arab Americans aged 65 or older residing in Southeast Michigan and 330 interviews with Social Relations sample members aged 65 or older. The Arab American sample will be selected based on an in-person household screening. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements. Social Relations respondents will only complete the cognitive interview. An informant interview will also be conducted for all sample members. Interviews will be conducted in English or Arabic. | | |
| SRO Project Period | 05/2019 - 03/2023 | | |
| Data Col Period | 05/2023 - 03/2024 | | |
| Security Plan | No | | |

| Milestones | | | |
|---|---|---|---|
| *Pre Production Start:* 12/01/2022 | | *Pretest Start:* | |
| *Pretest End:* | | *Recruitment Start:* 02/01/2023 | |
| *Staffing Complete:* 04/10/2023 | | *GIT Start:* 05/16/2023 | |
| *SS Train Start:* 05/18/2023 | | *SS Train End:* 05/25/2023 | |
| *DC Start:* 05/30/2023 | | *DC End:* 09/30/2023 | |

| | |
|---|---|
| Other Project Team Members | Taghreid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall |
| Other Project Name | 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 | Feb, 2024 (Health and Well Being in SE MI) | Implementing |
|---|---|---|
| Risk Level | Attention! | |
| Monthly Updates | BLUF: D-AMP still significantly underperforming. PIs have proposed scope reductions which still require significant additional funding. SRO provided ballpark estimates for proposed scope reductions. The PIs meet with the project office on 3/21/2024 and believe they will be given an indication of whether they will receive additional funding. (However timing of receipt of additional funding could be an issue) | |
| | The D-AMP project has continued to underperform, with interviewers completing only 15 main interviews and 15 informant interviews per month. While this is higher than earlier months, it is far lower than what the project needs. As noted earlier, the new sample design (super-high MENA) released on Dec 7 shows improved eligibility (41-42% versus previous releases at 10%) however this will not make up for the high interviewing costs to date.  The PIs have increased community outreach significantly, however this has not had an impact on the effort required to complete screening and interviewing. | |

On Feb 8, we gave the PIs a ballpark number for completion of the full sample (the original scope). *From Feb 1 2024 going forward, D-AMP would need an estimated additional $2 to 2.2 million direct cost. This estimate takes into account the approximately $700,000 in direct cost remaining in the project. The PIs understood this number and asked a number of follow up questions, which were answered in email and also pasted in the Feb 15 meeting notes (uploaded to MPR). In the Feb 15 meeting, they mentioned that they would seek additional funding.

On Feb 22, the PIs asked for a budget for a scope reduction for D-AMP. The reduction substituted 300 cases from screening with 300 convenience sample cases, to be identified through work with targeted community organizations. SRO provided a budget for this new design on Feb 29, however the new design still required significant new funding over and above what remained in the existing budget ($1.22 million in additional funding). This estimate still contained significant risk due to the unknown effort to complete the convenience sample cases. The research team asked for the cost of the convenience sample, and what could be afforded with the current remaining funds. These estimates were provided to the research team on March 14. The PIs indicated that they felt they could raise about $900,000 direct in new funding. They also mentioned that they were meeting with the project officer on March 22, 2024.

On March 21 (notes uploaded), the SRO team provided the research team with ballpark cost estimates for several variations on the new design: reducing the new screening sample, increasing the convenience sample, and reducing the panel sample. The LCD team will likely use these estimates when meeting with the project officer on March 22. SRO provided the LCD team with information about what the project could likely accomplish with the remaining funds, and assuming an 8/31/2024 end of production. We also advised the PIs that the project could end earlier if production and spending increased over its current rates. SRO advised the PIs that they would need a notice of award in writing if a hardship fund were needed.

SRO is preparing for the release of the panel study, which was approved by the PIs in January. The close-to-final panel sample was only very recently received by SRO (end of Feb, but still being modified in March). Panel materials were submitted to the IRB but have not yet been approved. We anticipate an early April panel sample release, pending IRB approval and PI approval. SRO has asked the PIs to set priorities for interviewer work, given the limited amount of funding remaining for the study.

| Special Issues | SRO notified the PIs that it would look to them to set priorities for interviewer work given the limited amount of funding remaining. |
| | |
| | We are concerned that the study will run out of funds for interviewer before additional funding is awarded. This was discussed with the PIs on 3/21, and the PIs were told they needed a notice of award in writing in order to request bridging funds. |

| Cost as of Mar 19, 2024 | Total Cost to Date (direct + indirect): | | 2,763,926.51 |
|---|---|---|---|
| | Est Cost at Completion (E$AC): | | 3,756,301.04 |
| | Total Budget: | | 3,758,127.00 |
| | Variance (Total Budget minus- E$AC): | | 1,825.96 |
| | 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 Mar 19, 2024 | Dollars Projected for Month: | | 184,390.51 |
| | Actual Dollars Used: | | 116,176.23 |
| | Variance (Projected minus Actual): | | 68,214.28 |
| | Reason for Variance: | Respondent cooperation remains low, and interviewer attrition (or vacations) impacted the project. We lowered projections significantly, however production still came in lower than anticipated. In February, interviewers continued to direct time toward the SRS project instead of D-AMP, leading to some of the underrun. We continue to lower interviewer hours and related expenses to try to calibrate to production. | |

| 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: | 113 main, 84 inf | 38% scr, 38% main | 37.8 HPI w/screening |
| | Estimate at Complete: | | | |
| | Variance: | | | |
| Other Measures | Interview results above are as of 3/21/2023.<br>RR shown above are for the released sample.<br>Budgeted at 140 minutes, the D-AMP average interview length is 161 minutes.<br>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 | David Weir (ISR-SRC) | | |
| Investigator/Clients | | | |
| Funding Agency | | | |
| IRB | *HUM#:* HUM000611128 | | *Period of Approval:* 6/7/2023-6/6/2024 |
| Project Team | *Project Lead:* Evanthia Leissou | | |
| | *Budget Analyst:* Richard Warren Krause | | |
| | *Production Manager:* Andrea Sims | | |
| | *Senior Project Advisor:* Nicole G Kirgis | | |
| | *Production Manager 1:* Jennifer C Arrieta | | |
| | *Production Manager 2:* Theresa Camelo | | |
| Proposal # | no data | | |
| Description | The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested. | | |
| SRO Project Period | 01/2021 - 12/2023 | | |
| Data Col Period | 03/2022 - 08/2023 | | |
| Security Plan | NA | | |

| Milestones | *Pre Production Start:* 01/01/2021 | *Pretest Start:* 11/01/2021 |
|---|---|---|
| | *Pretest End:* 11/23/2021 | *Recruitment Start:* 08/01/2021 |
| | *Staffing Complete:* 01/15/2022 | *GIT Start:* 02/21/2021 |
| | *SS Train Start:* 02/23/2022 | *SS Train End:* 03/03/2022 |
| | *DC Start:* 03/07/2022 | *DC End:* 05/10/2025 |

| Other Project Team Members | Derek Dubuque (Production Manager), Alex Warju (Production Manager), Milagros Hierro (Production Manager), Deborah Zivan (Project Manager), Andrew Hupp (Project Manager), Gary Hein (Project Manager), Erin McSpadden (Project Manager), Daniah Buageila (Project Manager), Janet McBride (Project Assistant), Paul Burton (Stats/Sampling), Vanessa Clarke (Project Assistant), Jeannie Baker (Project Manager), Melissa Luker (Project Assistant), Anthony Romanowski (Project Manager), Megan Hromco (Project Assistant). Kristen Cross (Project Assistant), Austin De Spirito (Project Assistant), Cindy Huang (Budget Analyst), Andria Goedert (Project Assistant), Dominic Bonanni (Project Assistant) |
|---|---|
| | Tech Team: Karl Dinkelmann, Jeff Smith, Jim Rodgers, Laura Yoder, Marsha Skoman, Ashwin Dey, Pam Swanson, David Bolt, Deb Wilson, Jennie Williams, Rose Zybdel, Stephanie Windisch, Holly Ackerman, Shane Empie, Kelly Chatain, Brianna Sabol |
| | Coding Lead: Carolyn Vieira-Martinez |
| Other Project Name | HRS 2022 Main Iws |
| Sample Mgmt System | SurveyTrak; MSMS |
| Data Col Tool | Blaise 5; SAQ |
| Hardware | Laptop; [UM cell] Phone; Paper and Pencil |
| DE Software | Other (Blaise 5 Coding Application); External vendor (DataForce) |
| QC Recording Tool | Camtasia |
| Incentive | Yes, R; Yes, INF |
| Administration | NA |
| Payment Type | Check, prepaid ($80 (Panel)); Check, post ($50 (WBD)); Cash, post ($20 (SAQ), $100 (Baselines) ) |
| Payment Method | Check through STrak RPay System; Check through other system (Rpay system set up for MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (Rpay system set up for MSMS); Imprest Cash Fund from ISR Business Office (Rpay system set up for MSMS) |

-----------------------------------------------------------------------------------------------

| Report Period | Feb, 2024 (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.

2. Baseline production has improved since implementing the high priority flagging, baseline end game strategy, and the release of additional screener sample leading to more baseline sample being generated. Interviewers continue to work less hours than committed but field managers continue to work with interviewers who are not meeting expectations.

3. Planning for an end of May/early June new cohort training of approximately 80 interviewers continued.

4. Based on the propensity model run in September, 5,428 baseline cases that have ever been flagged priority of which 1,019 (19%) have completed an interview. Newly generated baselines from screening continue to be flagged on a weekly basis.

5. 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. 5,305 baseline respondents have been mailed the end game letter of which 474 (9%) have completed the interview. New cases are flagged for end game weekly.

7. Address sorting began in preparation to release reserve screening sample.

*The "measures" table reflects both Panel and Baseline combined as of 3/19 (note: Projections were updated recently taking into account actuals to date, staffing counts, and effort needed to reach goals).

| | |
|---|---|
| **Special Issues** | - Did not meet the Panel response rate goal of 74% even with the additional five months of field time and responsive design strategies due to interviewer count and balancing effort with new cohort screening/baseline iws.<br>- Slow progress with baseline interviewing.<br>- Multiple Blaise issues that have impacted STrak and MSMS throughout data collection.<br>- 2022 New Cohort data collection projected to end in May 2025 in order to meet goal.<br>- Competing project team demands with HRS 2022 and HRS 2024 simultaneous data collections as well as multiple trainings planned for both in spring and fall 2024.<br>- High field staff attrition rate. Burden on staff with additional recruitment and training efforts while managing production. |

| | | |
|---|---|---|
| **Cost as of Mar 19, 2024** | *Total Cost to Date (direct + indirect):* | 18,094,818.84 |
| | *Est Cost at Completion (E$AC):* | 18,077,410.84 |
| | *Total Budget:* | 19,016,630.00 |
| | *Variance (Total Budget minus- E$AC):* | 939,219.16 |
| | *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 Mar 19, 2024** | *Dollars Projected for Month:* | -3,508.80 |
| | *Actual Dollars Used:* | 7,232.08 |
| | *Variance (Projected minus Actual):* | -10,740.88 |
| | *Reason for Variance:* | Check payments for the 2022 new cohort baselines implemented as part of the mode change to TEL strategy were mistakenly charged to panel account code. The charges will be moved to the new cohort account code. |

| **Measures** | | **Units at Complete** | **RR** | **HPI** |
|---|---|---|---|---|
| | *Current Goal:* | 16,540 | 50% | 11.5 |
| | *Goal at Completion:* | 22,297 | 46% | 8.3 |
| | *Current Actual:* | 16,533 | 50% | 11.5 |
| | *Estimate at Complete:* | 19,443 | 44% | 13.5 |
| | *Variance:* | 2,854 | 2% | 5.3 |

| | |
|---|---|
| **Other Measures** | Panel: Expected RR: 68% (original goal 74%), Final RR: 68% (Panel end date 9/2/23)<br>2022 Baselines generated from screener: Goal: 6,003 iws; Current: 3,064 iws from 11,178 baselines spawned from screener as of 3/19/24.<br>2019 EGenX baselines: Goal RR: 70% , Current RR: 74.4% |

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

| **Milestones** | | | |
|---|---|---|---|
| | **Pre Production Start:** 05/15/2023 | **Pretest Start:** 01/29/2024 |
| | **Pretest End:** 02/18/2024 | **Recruitment Start:** 12/19/2023 |
| | **Staffing Complete:** 03/15/2024 | **GIT Start:** 04/22/2024 |
| | **SS Train Start:** 04/23/2024 | **SS Train End:** 04/29/2024 |
| | **DC Start:** 05/06/2024 | **DC End:** 05/31/2025 |

| | |
|---|---|
| **Other Project Team Members** | Alex Warju (Production Manager), Gary Hein (Project Manager), Erin McSpadden (Project Manager), Daniah Buageila (Project Manager), Janet McBride (Project Assistant), Paul Burton (Stats/Sampling), Vanessa Clarke (Project Assistant), Jeannie Baker (Project Manager), Melissa Luker (Project Assistant), Anthony Romanowski (Project Manager), Megan Hromco (Project Assistant), Austin De Spirito (Project Assistant), Cindy Huang (Budget Analyst), Dominic Bonanni (Project Assistant)

Tech Team: Karl Dinkelmann, Jeff Smith, Jim Rodgers, Laura Yoder, Marsha Skoman, Ashwin Dey, Pam Swanson, David Bolt, Deb Wilson, Jennie Williams, Rose Zybdel, Stephanie Windisch, Holly Ackerman, Shane Empie, Kelly Chatain, Brianna Sabol, Kelly Lieske |
| **Other Project Name** | HRS 2024 Panel |
| **Sample Mgmt System** | SurveyTrak; MSMS |
| **Data Col Tool** | Blaise 5; SAQ |
| **Hardware** | Laptop; [UM cell] Phone; Paper and Pencil |
| **DE Software** | Other (Blaise 5 Coding Application); External vendor (DataForce) |
| **QC Recording Tool** | Camtasia |
| **Incentive** | Yes, R; Yes, INF |
| **Administration** | NA |
| **Payment Type** | Check, prepaid ($100 (Interview)); Check, post ($50 (WBD), $20 (SAQ), $20 (SSA)) |
| **Payment Method** | Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office |

**--------------------------------------------------------------------------------------------------------------------**

| | | |
|---|---|---|
| **Report Period** | Feb, 2024 (HRS 2024) | Planning |
| **Risk Level** | Some Concerns | |
| **Monthly Updates** | HRS 2024 pre-production activities continued with focus cost projections, technical specifications, technical development, SurveyTrak testing, Instrument testing via SurveyTrak, task rules testing (without Blaise instrument) via MSMS DCA, pretest data collection, and production new hire recruitment.

HRS 2024 will utilize Blaise 5.14 for pretest and production. HRS requires the session data (the working database) as a deliverable and requested CBS to add this as a feature in Blaise. The tech team continued to meet weekly in February with CBS to try to address getting this feature and other issues stemming from the addition of this feature to work in the DIM/MSMS offline world. Blaise 5.14 is working fine in SurveyTrak. | |

Pretest Data Collection: Conducted 1/29-2/17 with 13 field interviewers who completed 145 interviews (54% RR)
Production training:
 - Southfield Westin 4/22-4/29 (2 days GIT, 6 days Study Specific)
 - Goal: 80 interviewers (40 on-staffers, @40 new hires)
Production:
-TEL, FTF, FTFe Production start (SurveyTrak): 5/6/224
-Web Production Start (MSMS): 6/17/24
-Web Non-Response Follow-up Start (MSMS): 8/1/24

| | |
|---|---|
| **Special Issues** | -Project team resource concerns for HRS 2024 and HRS 2022 with simultaneous production periods and multiple trainings planned in spring and fall 2024.<br>-Blaise 5.14 issues related to the feature added at HRS' request for saving session database online and offline that could impact Web Panel production. |

| Cost as of Mar 19, 2024 | *Total Cost to Date (direct + indirect):* | | 751,891.96 |
|---|---|---|---|
| | *Est Cost at Completion (E$AC):* | | 1,242,797.49 |
| | *Total Budget:* | | 821,421.00 |
| | *Variance (Total Budget minus- E$AC):* | | -421,376.49 |
| | *Reason for Variance:* | Projections in CRS are for pre-production and pretest data collection. Will update the total budget once the 6 year renewal proposal funds are awarded. Variance since last month is due to delay in the new award. We have been instructed to continue to charge the pre-production account codes until the new award comes in. | |
| Projections as of Mar 19, 2024 | *Dollars Projected for Month:* | | 563,619.16 |
| | *Actual Dollars Used:* | | 267,563.90 |
| | *Variance (Projected minus Actual):* | | 296,055.26 |
| | *Reason for Variance:* | Variance primarily due to hosting, recruitment travel, lab supplies, and advertising not hitting in February as projected. 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:* Evanthia Leissou | | |
| | *Production Manager 1:* | | |
| | *Production Manager 2:* | | |
| Proposal # | no data | | |
| Description | HRS Staff will provide SRO with the text description of approximately 10,000 occupations reported in interviews completed during 1994-2002 waves of data collection. The Survey Services Laboratory (SSL) will complete a crosswalk between the 1980 and 2010 occupation census codes as well ass occupation re-coding for jobs reported during the 1994-2002 waves of HRS data collection, using 2010 Census codes. Coding for these occupations was completed in the past using 1980 Census codes. | | |
| SRO Project Period | 09/2022 - 06/2024 | | |
| Data Col Period | | | |
| Security Plan | NA | | |
| Milestones | *Pre Production Start:* | | *Pretest Start:* |
| | *Pretest End:* | | *Recruitment Start:* |
| | *Staffing Complete:* | | *GIT Start:* |
| | *SS Train Start:* | | *SS Train End:* |
| | *DC Start:* | | *DC End:* |
| Other Project Team Members | | | |
| Other Project Name | HRS Historical Coding | | |
| Sample Mgmt System | NA | | |
| Data Col Tool | NA | | |
| Hardware | Desktop | | |
| DE Software | Other (Coding Application) | | |
| QC Recording Tool | NA | | |
| Incentive | Not used | | |
| Administration | N/A | | |
| Payment Type | N/A | | |
| Payment Method | N/A | | |

-------------------------------------------------------------------------------------------------

| Report Period | Feb, 2024 (HRS HOC) | Planning |
|---|---|---|
| Risk Level | Some Concerns | |
| Monthly Updates | -Jeannie met bi-weekly with the team to come up with a more accurate count of "instances of coding".  While an initial quote was provided by Eva, it was discovered that it did not include industry coding or more than once instance of coding per SID.<br>-Qize (HRS grad student) developed an Excel chart which more accurately represented the actual numbers: 53,623 SIDs with an average of 2.18 instances of coding per SID. This number includes both occupation and industry.<br>-These updated numbers have been turned over to Carolyn in the SSL to provide an estimate for both time and cost.<br>---Carolyn and Debbie Seale provided 2 scenarios with 6 mth and 9 mth completion dates.<br>Awaiting a new budget from Eva and Rick. | |

| **Special Issues** | - PI with the most coding experience/knowledge left the organization shortly after start of project<br>-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.<br>-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.<br>-Consistent delays in the coding data delivery to SRO makes it difficult to really plan for coding resources.<br>-Funding for the supplement ends at the end of February 2024. |
|---|---|

| **Cost as of Mar 19, 2024** | *Total Cost to Date (direct + indirect):* | | 26,960.86 |
|---|---|---|---|
| | *Est Cost at Completion (E$AC):* | | 26,960.86 |
| | *Total Budget:* | | 92,157.06 |
| | *Variance (Total Budget minus- E$AC):* | | 65,196.20 |
| | *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 Mar 19, 2024** | *Dollars Projected for Month:* | | 3,025.31 |
| | *Actual Dollars Used:* | | 1,061.67 |
| | *Variance (Projected minus Actual):* | | 1,963.64 |
| | *Reason for Variance:* | Due to initial project delay and further delay with HRS (ISR) staff, coding hours have not been utilized. | |

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

**Other Measures**

| | |
|---|---|
| **Project Name** | **(HRS2022-Screening) HRS 2022 - Screening (Some Concerns)** |
| **Project Mode** | Primary: Face to Face     Secondary: Telephone     Total of Modes: 3 |
| **Project Type** | Sponsored Projects |
| **Budget** | **Direct Budget:** 21,264,149.00     **Indirect Budget:** 7,655,093.00     **Total Budget:** 28,919,242.00 |
| **Principal** | David Weir (SRC) |
| **Investigator/Clients** | Helen Levy (SRC) |
| | Ken Langa (SRC) |
| **Funding Agency** | |
| **IRB** | ***HUM#:***                                                                 ***Period of Approval:*** |
| **Project Team** | ***Project Lead:*** Evanthia Leissou |
| | ***Budget Analyst:*** Richard Warren Krause |
| | ***Production Manager:*** |
| | ***Senior Project Advisor:*** Nicole G Kirgis |
| | ***Production Manager 1:*** Andrew L Hupp |
| | ***Production Manager 2:*** Theresa Camelo |
| **Proposal #** | no data |
| **Description** | The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample. |
| **SRO Project Period** | 02/2021 - 08/2024 |
| **Data Col Period** | 03/2022 - 06/2024 |
| **Security Plan** | NA |

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

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

--------------------------------------------------------------------------------------------------

| | | |
|---|---|---|
| **Report Period** | Feb, 2024 (HRS2022-Screening) | Implementing |
| **Risk Level** | Some Concerns | |
| **Monthly Updates** | Screening is going at a steady pace. We've been exceeding both production and effort (hours) goals on screening. Most of release 6 is in the hands of interviewers. There remain a few unstaffed areas that haven't had trips that is still being held.<br><br>We have released 10,635 cases to the endgame protocol. 883 cases (8.3%) of cases have completed a screener. 78 cases (8.8%) completed via the web, and 805 (91.2%) of cases completed in-person.<br><br>The first replicate of reserve segments (148) should be have address sorting complete by the end of this week. The team will begin work on the second replicate (154 segments). | |
| **Special Issues** | | |
| **Cost as of Mar 08, 2024** | ***Total Cost to Date (direct + indirect):*** | 21,526,456.51 |

| | Est Cost at Completion (E$AC): | | | 36,671,209.27 |
|---|---|---|---|---|
| | Total Budget: | | | 28,919,242.00 |
| | Variance (Total Budget minus- E$AC): | | | -7,751,967.27 |
| | Reason for Variance: | Projections have been entered through March 2025 (projection of when we would meet the baseline production goal). | | |
| Projections as of Mar 08, 2024 | Dollars Projected for Month: | | | 942,771.83 |
| | Actual Dollars Used: | | | 1,062,799.55 |
| | Variance (Projected minus Actual): | | | -120,027.72 |
| | Reason for Variance: | Salary was over 2,076 hours. The majority of those hours were from the field interviewers . Non-salary was ~$10,000 over,. Recharges accounted for ~$8K of the variance. R-Pay and travel projections were under and pushed forward. | | |

| Measures | | Units at Complete | RR | HPI |
|---|---|---|---|---|
| | Current Goal: | 7,017/3,645 HHs | 73% | 3.0 |
| | Goal at Completion: | | | |
| | Current Actual: | 3,942/3,370 | 43.8% | 2.84 |
| | 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** | Sonalde Desai (University of Maryland) | | |
| **Investigator/Clients** | Stephanie Chardoul (University of Michigan ) | | |
| | Santanu Pramanik (National Council of Applied Economic Research) | | |
| **Funding Agency** | National Institutes of Health, Department of Health and Human Services | | |
| **IRB** | ***HUM#:*** | | ***Period of Approval:*** |
| **Project Team** | ***Project Lead:*** Sarah Elisa Broumand | | |
| | ***Budget Analyst:*** Ryan Neice | | |
| | ***Production Manager:*** | | |
| | ***Senior Project Advisor:*** Stephanie A Chardoul | | |
| | ***Production Manager 1:*** Sarah Elisa Broumand | | |
| | ***Production Manager 2:*** Sarah Elisa Broumand | | |
| **Proposal #** | no data | | |
| **Description** | The India Human Development Survey (IHDS) is a nationally representative, multi-topic, longitudinal  survey of 41,554 households in 1503 villages and 971 urban neighborhoods across India. The first round of interviews were completed in 2004-5; data are publicly available through ICPSR. A second round of IHDS reinterviewed most of these households in 2011-12 (N=42,152). SRC joins IHDS Wave 3 to automate data collection, the scope of work includes methodological design, sample design, questionnaire design, technical instrument design, supervisor/interviewer training, production monitoring, quality control, data dissemination, and 2-3 weekly conference calls for capacity building. | | |
| **SRO Project Period** | 01/2019 - 03/2024 | | |
| **Data Col Period** | 05/2022 - 10/2023 | | |
| **Security Plan** | NA | | |

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

| **Other Project Team Members** | Project Management Team<br>Stephanie Chardoul -- Senior Project Advisor (SPA)<br>Sarah Broumand - Project Manager<br><br>Programming Team<br>Collette Keyser - Blaise<br>Marsha Skoman - SurveyTrak<br>Holly Ackerman - WebTrak<br>Cheng Zhou - Sync<br><br>HelpDesk Team<br>Emmanuel Ellis<br>John<br><br>Data Manager Team<br>Sarah E<br>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** | Feb, 2024 (IHDS3) | Implementing |
|---|---|---|

| Risk Level | On Track |
|---|---|
| **Monthly Updates** | As of today, A01 to A13 have completed production, we now have left A14 and Migrant Project. We continue to be focused on close out activities for A01 to A13. This involves some data recovery and working on merges. At this moment the amount of data recovery is unknown but appears to be manageable(minimal compared to other SRO projects). We recently found out that due to elections going on in India, the project may have to do a no cost extension to have enough time to meet production goals. |

| **Special Issues** | Wave 3 funding balance ended at -$18,833.61 direct and indirect costs ( -$12,072.53 Direct)) | |
|---|---|---|
| **Cost as of Mar 19, 2024** | *Total Cost to Date (direct + indirect):* | 96,517.87 |
| | *Est Cost at Completion (E$AC):* | 133,864.35 |
| | *Total Budget:* | 134,259.00 |
| | *Variance (Total Budget minus- E$AC):* | 394.65 |
| | *Reason for Variance:* | TOTAL Budget is $134,259.00 . Not carrying forward certain amount of hours due additional funds that may be needed during closeout. |

| **Projections as of Mar 19, 2024** | *Dollars Projected for Month:* | 10,602.48 |
|---|---|---|
| | *Actual Dollars Used:* | 7,125.54 |
| | *Variance (Projected minus Actual):* | 3,476.94 |
| | *Reason for Variance:* | Due to staffing constraints some of the allocated hours could not be used, they will be re-allocated moving forward. |

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

| | |
|---|---|
| **Project Name** | **(LHMS 2023 Fall) Life History Mail Study Fall 2023 (On Track)** |
| **Project Mode** | Primary: Mail     Secondary: Telephone     Total of Modes: 2 |
| **Project Type** | Sponsored Projects |
| **Budget** | **Direct Budget**: 371,587.00     **Indirect Budget:** 133,772.00     **Total Budget:** 505,359.00 |
| **Principal** | David Weir (SRC) |
| **Investigator/Clients** | Jaqui Smith (SRC) |
| **Funding Agency** | NIH |
| **IRB** | *HUM#:* HUM00106904     *Period of Approval:* 9/29/2023-9/28/2024 |
| **Project Team** | *Project Lead:* Gary Hein |
| | *Budget Analyst:* Cindy Tsao |
| | *Production Manager:* Ruth B Philippou |
| | *Senior Project Advisor:* Evanthia Leissou |
| | *Production Manager 1:* |
| | *Production Manager 2:* Ruth B Philippou |
| **Proposal #** | no data |
| **Description** | The HRS Life History Mail Survey (LHMS) is part of the Health and Retirement Study. The goal of LHMS is to collect retrospective life histories of HRS participants to address multidisciplinary need for information about events, residential location, and education over the entire life course. Information like this allows researchers to understand how individuals' pasts shape their health and economic situations today.

A paper questionnaire will be mailed to a sample of approximately 4,601 HRS Respondents. From this sample, approximately 2,485 completed surveys are expected (54% response rate). For the reminder protocol, 272 respondents have been designated to receive a reminder by postcard. The remaining 4,329 respondents will receive reminders by phone to complete the questionnaire. When a respondent is reached by phone, SRO will attempt to complete the 60-minute interview by telephone. Thank you postcards will be mailed to respondents who return a completed questionnaire. |
| **SRO Project Period** | 09/2023 - 04/2024 |
| **Data Col Period** | 10/2023 - 02/2024 |
| **Security Plan** | NA |

| **Milestones** | | |
|---|---|---|
| *Pre Production Start:* 09/01/2023 | | *Pretest Start:* |
| *Pretest End:* | | *Recruitment Start:* |
| *Staffing Complete:* | | *GIT Start:* |
| *SS Train Start:* | | *SS Train End:* |
| *DC Start:* 10/05/2023 | | *DC End:* 02/29/2024 |

| | |
|---|---|
| **Other Project Team Members** | Gary Hein: Project Lead<br>Cindy Tsao: Budget Analyst<br>Ruth Philippou: Production Manager<br>Vanessa Clarke: Project Assistant<br>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** | Feb, 2024 (LHMS 2023 Fall) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | Fall LHMS activities and notable events:<br><br>1- SAQs received and logged<br>2- Progress reports prepared and delivered to PIs<br>3- SAQs shipped to DataForce for scanning<br>4- Scanned SAQs and Fall data deliveries delivered to HRS | |

5- Crosswalk for data delivery prepared by project managers
6- Thank you post cards generated and mailed
7- Reminder calling data collection continued
8- Investigated and fixed an error with how data was being populated in FPR reports
9- SRO team members attended check-in meetings

| | |
|---|---|
| **Special Issues** | - SSL resource availability for reminder calling and logging activities.<br>- 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 3/20/2024) is 18%.<br>-Reminder calling was extended through the first week of March |

| Cost as of Mar 19, 2024 | | |
|---|---|---|
| | *Total Cost to Date (direct + indirect):* | 310,541.59 |
| | *Est Cost at Completion (E$AC):* | 306,235.68 |
| | *Total Budget:* | 505,359.00 |
| | *Variance (Total Budget minus- E$AC):* | 199,123.32 |
| | *Reason for Variance:* | Staffing for reminder calling will not meet original projections. Lower response rates than anticipated are resulting in lower costs across the project. |

| Projections as of Mar 19, 2024 | | |
|---|---|---|
| | *Dollars Projected for Month:* | 27,502.65 |
| | *Actual Dollars Used:* | 29,472.61 |
| | *Variance (Projected minus Actual):* | -1,969.96 |
| | *Reason for Variance:* | Reminder calling hours were higher than projected. Additional programming hours were needed to fix an issue with FPR reports. |

| Measures | | Units at Complete | RR | HPI |
|---|---|---|---|---|
| | *Current Goal:* | 2063 | 54% | N/A |
| | *Goal at Completion:* | 2063 | 54% | N/A |
| | *Current Actual:* | 637 | 17% | N/A |
| | *Estimate at Complete:* | 660 | 17% | N/A |
| | *Variance:* | 1403 | 38% | N/A |

| | |
|---|---|
| **Other Measures** | N/A |

| Project Name | **(LHMS 2023 Spring) Life History Mail Study Spring 2023 (On Track)** | | |
|---|---|---|---|
| **Project Mode** | Primary: Mail    Secondary: Telephone    Total of Modes: 2 | | |
| **Project Type** | Sponsored Projects | | |
| **Budget** | **Direct Budget**: 293,540.00 | **Indirect Budget:** 164,382.00 | **Total Budget:** 457,922.00 |
| **Principal** | David Weir (SRC) | | |
| **Investigator/Clients** | Jaqui Smith (SRC) | | |
| **Funding Agency** | NIH | | |
| **IRB** | **HUM#:** HUM00229404 | | **Period of Approval:** 11/4/2022-11/3/2023 |
| **Project Team** | **Project Lead:** Gary Hein | | |
| | **Budget Analyst:** Cindy Tsao | | |
| | **Production Manager:** William Keating | | |
| | **Senior Project Advisor:** Evanthia Leissou | | |
| | **Production Manager 1:** | | |
| | **Production Manager 2:** William Keating | | |
| **Proposal #** | no data | | |
| **Description** | The HRS Life History Mail Survey (LHMS) is part of the Health and Retirement Study. The goal of LHMS is to collect retrospective life histories of HRS participants to address multidisciplinary need for information about events, residential location, and education over the entire life course. Information like this allows researchers to understand how individuals' pasts shape their health and economic situations today.<br><br>A paper questionnaire will be mailed to a sample of approximately 2,288 HRS Respondents. From this sample, approximately 1,242 completed surveys are expected (54% response rate). For the reminder protocol, 495 respondents have been designated to receive a reminder by postcard. The remaining 1,793 respondents will receive reminders by phone to complete the questionnaire. When a respondent is reached by phone, SRO will attempt to complete the 60-minute interview by telephone. Thank you postcards will be mailed to respondents who return a completed questionnaire. | | |
| **SRO Project Period** | 04/2023 - 12/2023 | | |
| **Data Col Period** | 06/2023 - 09/2023 | | |
| **Security Plan** | NA | | |

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

| | |
|---|---|
| **Other Project Team Members** | Gary Hein: Project Lead<br>Cindy Tsao: Budget Analyst<br>Vanessa Clarke: Project Assistant<br>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** | Feb, 2024 (LHMS 2023 Spring) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | January Activities and Notable Events:<br>1 -Logged returned SAQs<br>2- Weekly progress reports created and delivered to project stakeholders<br>3- Data delivery of completed scanned SAQs to HRS<br>4- Completed SAQs mailed to DataForce for scanning<br>5- Created of data crosswalks for data deliveries<br>6- Generated and mailed thank you cards to respondents | |

**Special Issues**

| Cost as of Mar 14, 2024 | Total Cost to Date (direct + indirect): | | 252,967.96 |
|---|---|---|---|
| | Est Cost at Completion (E$AC): | | 231,249.49 |
| | Total Budget: | | 457,922.00 |
| | Variance (Total Budget minus- E$AC): | | 226,672.51 |
| | 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 Mar 14, 2024 | Dollars Projected for Month: | | 1,075.87 |
| | Actual Dollars Used: | | 1,495.05 |
| | Variance (Projected minus Actual): | | -419.18 |
| | Reason for Variance: | The wrong CMC code was used for Fall LHMS reminder calling so the telephone admin fees charged to Spring. | |

| Measures | | Units at Complete | RR | HPI |
|---|---|---|---|---|
| | Current Goal: | 1053 | 54% | N/A |
| | Goal at Completion: | 1053 | 54% | N/A |
| | Current Actual: | 358 | 18% | N/A |
| | Estimate at Complete: | 360 | 18% | N/A |
| | Variance: | 693 | 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** | 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. <br><br> 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. <br><br> 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. <br> HUM00181068 - Year 3 IRB Exempt - Budget:$841,375 Total used:$649,836 <br> HUM00234617 - Year 4 - IRB approved - Budget:$477,681 | | |
| **SRO Project Period** | 08/2021 - 09/2023 | | |
| **Data Col Period** | 01/2022 - 07/2023 | | |
| **Security Plan** | NA | | |

| **Milestones** | ***Pre Production Start:*** | ***Pretest Start:*** | |
|---|---|---|---|
| | ***Pretest End:*** | ***Recruitment Start:*** 06/01/2023 | |
| | ***Staffing Complete:*** | ***GIT Start:*** | |
| | ***SS Train Start:*** 07/28/2023 | ***SS Train End:*** 07/29/2023 | |
| | ***DC Start:*** 09/14/2023 | ***DC End:*** 06/30/2024 | |

| **Other Project Team Members** | Bill Lokers: Financial Analyst <br> Megan Hromco: Production Assistant <br> Hueichun Peng: Technical Lead / WSMS db Programmer <br> Peter Sparks: CAI Programmer (Blaise 5) <br> Cheng Zhou: Web Component, ADT, Reports <br> LihShwu Ke: DBA Architecture & Data Security <br> Sarah Broumand: Data Manager <br> 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** | Feb, 2024 (MI CReSS (Year 3 & 4)) | Implementing |
|---|---|---|

| Risk Level | On Track |
|---|---|
| **Monthly Updates** | Cohort 1 - Completed in field and data has been delivered.<br>Final report delivered - 12/19/2023 - Update delivered 3/20/2024<br><br>Cohort 2 launched - Sept 14, 2023<br> - Arabic - Released 3/6/2024 for production<br> - Implemented $50 ToA change for all sample left except the Arabic.  Arabic will change to $50 ToA on 4/7/2024.<br>   - Have seen a good increase in the number of completes and as a result the Response Rate with all releases now over 70% with the exception of Release 8 which is at 68%.  Overall RR is 73%<br><br>Proposal for Release 9-16 submitted 1/19/2024.  Looks promising, expect more information around approval early April.<br>Moving forward with changes to survey instrument and processing of Release 9 to be release in the field in April using the carry forward money that has been approved.   There is a potential to run Release 10 as well without official approval.<br><br>Once approval is received, we will update the schedule for Releases 9-16 and start looking at training. |

| Special Issues | |
|---|---|

| Cost as of Mar 19, 2024 | *Total Cost to Date (direct + indirect):* | 341,177.96 |
|---|---|---|
| | *Est Cost at Completion (E$AC):* | 469,905.81 |
| | *Total Budget:* | 477,681.00 |
| | *Variance (Total Budget minus- E$AC):* | 7,775.19 |
| | *Reason for Variance:* Fewer hours billed to project than estimated/projected. | |
| Projections as of Mar 19, 2024 | *Dollars Projected for Month:* | 60,672.21 |
| | *Actual Dollars Used:* | 66,492.08 |
| | *Variance (Projected minus Actual):* | -5,819.87 |
| | *Reason for Variance:* Utilized more ST hours than estimated. | |

| Measures | | **Units at Complete** | **RR** | **HPI** |
|---|---|---|---|---|
| | *Current Goal:* | 1900 | 77 | 3 |
| | *Goal at Completion:* | 2030 | 80% | 3 |
| | *Current Actual:* | 1802 | 73.4 | 6.2 |
| | *Estimate at Complete:* | 1850 | 75% | 6.5 |
| | *Variance:* | -48 | -1.6% | 0.3 |
| 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.  MoCA is currently .71 HPI | | | |

| | |
|---|---|
| **Project Name** | **(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027 (On Track)** |
| **Project Mode** | Primary: Class SAQ     Total of Modes: 1 |
| **Project Type** | Sponsored Projects |
| **Budget** | **Direct Budget**: 6,267,988.00     **Indirect Budget:** 3,510,072.00     **Total Budget:** 9,778,060.00 |
| **Principal Investigator/Clients** | Richard Miech (SRC) |
| **Funding Agency** | National Institute on Drug Abuse, one of the National Institutes of Health. |
| **IRB** | **HUM#:** 00217920     **Period of Approval:** from 7/20/22 No CR |
| **Project Team** | **Project Lead:** Rebecca Gatward |
| | **Budget Analyst:** Dean E Stevens |
| | **Production Manager:** Margaret Lavanger |
| | **Senior Project Advisor:** Gregg Peterson |
| | **Production Manager 1:** Dominic Bonanni |
| | **Production Manager 2:** |
| **Proposal #** | no data |
| **Description** | Since 1975 the MTF survey has measured drug and alcohol use and related attitudes among adolescent students nationwide. A nationally representative sample of survey participants report their drug use behaviors across three time periods: lifetime, past year, and past month. The survey is funded by the NIDA, a component of the National Institutes of Health (NIH), and conducted by the University of Michigan. |
| | It is based on two interconnected series of surveys using nationally representative samples: |
| | (a) self-administered annual in-school surveys of 8th, 10th, and 12th graders (~45,000) in 400 schools. Proctors (SRO interviewers) coordinate and administer the data collection in schools (either FTF or remotely without visiting the schools). |
| | (b) panels of high school graduates aged 19-30, 35, 40,45, 50, 55, and 60 (now primarily surveyed by web). Panel members aged 19-30 are invited to participate every other year/asked to complete a web survey and the older sample members are sent questionnaires (mail and web) at five-year interval. The MTF panel study has three parts - early in the year a newsletter is mailed to panel members. If the newsletter is returned (undelivered) locating effort targets these panel members and others who have not participated for X years.  The web panel launches (web) in spring and in around June a telephone non-response effort begins for those invited to participate. The panel members are recruited from the 12th graders who participate in the base year study. |
| | Press releases and published results can be found here.. http://www.monitoringthefuture.org/ |
| **SRO Project Period** | 04/2022 - 03/2027 |
| **Data Col Period** | 04/2022 - 03/2027 |
| **Security Plan** | Yes |

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

| | |
|---|---|
| **Other Project Team Members** | Hueichun Peng  Technical Lead (WebSMS and Qualtricsprogrammer) |
| | Brad Goodwin (+Ed Green)  Data Management |
| | Ashwin Dey SurveyTrak, WebTrak and MTF specific Apps. Programmer |
| | Brendon Carroll Help Desk/Tablet support |
| **Other Project Name** | |
| **Sample Mgmt System** | SurveyTrak; Web SMS; Illume |
| **Data Col Tool** | Illume |
| **Hardware** | Laptop; Tablet; [UM cell] Phone |
| **DE Software** | Illume |
| **QC Recording Tool** | N/A |
| **Incentive** | Yes, Other (Honorarium paid to school by MTF Research staff) |
| **Administration** | ISR Group |
| **Payment Type** | NA |
| **Payment Method** | Check through other system |

------------------------------------------------------------------------------------------------

| | | |
|---|---|---|
| **Report Period** | Feb, 2024 (MTF Base Year 2022_27) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | February 2023 | |
| | - We launched production on 1/29, the first school survey was conducted in 2/12. Study Proctors (Interviewers) | |

began contacting schools from 1/29. The transition to Qualtrics (so far) has been smooth. We delivered test data to the MTF team for review. No major issues identified (some routing updates were made in the surveys).
- The technical systems were up and running at the beginning of production - THANK YOU to Hueichun (Shaowei and LihShwu) and and the rest of the MTF team. WebSMS is pulling in data from Qualtrics.
- The main trainings were conducted in January, some specific parts of the protocol will be covered during regular conference calls.
- As of today (3/15) surveys have been completed (and post survey tasks finalised) in 70 schools (7098 student surveys completed).

**Special Issues**

| Cost as of Mar 08, 2024 | *Total Cost to Date (direct + indirect):* | 2,075,078.78 |
|---|---|---|
| | *Est Cost at Completion (E$AC):* | 6,681,551.16 |
| | *Total Budget:* | 9,778,060.00 |
| | *Variance (Total Budget minus- E$AC):* | 3,096,508.84 |
| | *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 Mar 08, 2024 | *Dollars Projected for Month:* | 203,719.23 |
|---|---|---|
| | *Actual Dollars Used:* | 151,534.60 |
| | *Variance (Projected minus Actual):* | 52,184.63 |
| | *Reason for Variance:* | Source of variance are travel costs. I've revised projections so prepaid costs (flight) and post paid costs (hotel/rental car) are projected in the appropriate months. |

| 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** | 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.<br><br>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). | | |
| **SRO Project Period** | 12/2023 - 12/2025 | | |
| **Data Col Period** | 04/2024 - 08/2025 | | |
| **Security Plan** | NA | | |

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

| **Other Project Team Members** | Rebecca Gatward (SPA), Donnalee Grey-Farquharson (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** | Feb, 2024 (MTF Early Panel Pilot) | Initiation |
|---|---|---|
| **Risk Level** | On Track | |
| **Monthly Updates** | 1. Project Management<br>-coordinated testing efforts with the MTF study team.<br>-started integration testing<br><br>2. Web SMS<br>-Worked with MTF study team on connecting Qualtrics and Web SMS.<br>-Web SMS programming is in progress. | |
| **Special Issues** | | |

| Cost as of Feb 29, 2024 | **Total Cost to Date (direct + indirect):** | | | 21,576.96 |
|---|---|---|---|---|
| | **Est Cost at Completion (E$AC):** | | | 278,408.40 |
| | **Total Budget:** | | | 288,529.00 |
| | **Variance (Total Budget minus- E$AC):** | | | 10,120.60 |
| | **Reason for Variance:** | The project is moving forward steadily. The underrun amount will be adjusted next month accordingly. | | |
| Projections as of Feb 29, 2024 | **Dollars Projected for Month:** | | | 18,284.38 |
| | **Actual Dollars Used:** | | | 14,008.82 |
| | **Variance (Projected minus Actual):** | | | 4,275.56 |
| | **Reason for Variance:** | The project staff used less hours than the projected. The underrun amount will be adjusted next month accordingly. | | |

| 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 | This project is a continuation of MTF Illume Web 2021.<br><br>PI staff will edit and test 12 survey versions, all previously programmed in Illume by SRO. SRO will further test the surveys as part of the systems integration process. All 12 surveys will be launched in 2021. After testing is complete, SRO will launch the 2021 Web survey data collection with an estimated sample size of 20,000 cases identified by the Principal Investigator who will deliver the contact information including e-mail address to SRO. The Web survey data collection will replace aspects of the standard mail-based data collection. Both the separately funded Winter Location calling effort and Non-Response follow-up calling will include this sample – with the calling effort being integrated with the standard MTF activities. | | |
| SRO Project Period | 01/2022 - 03/2027 | | |
| Data Col Period | 04/2022 - 10/2026 | | |
| Security Plan | NA | | |

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

| Other Project Team Members | Rebecca Gatward (SPA), Donnalee Grey-Farquharson, Lloyd Hemingway, 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 | Feb, 2024 (MTF Panel 2022-27) | Implementing |
|---|---|---|
| Risk Level | On Track | |
| Monthly Updates | 1. Management<br>- Testing is on going<br>- Provided Email templates for programming<br>-Started integration testing<br><br>2. System<br>- Programming and testing for Web SMS is ongoing<br>- Set up automatic texting in Web SMS<br><br>3. Web Data Collection - N/A<br><br>4. Winter Location<br>- ended on 2/27/2024. | |

5. NR Production/Calling-N/A

6. RLM: testing project has been set up.

| Special Issues | | |
|---|---|---|
| **Cost as of Feb 29, 2024** | *Total Cost to Date (direct + indirect):* | 1,366,008.12 |
| | *Est Cost at Completion (E$AC):* | 3,883,391.31 |
| | *Total Budget:* | 3,895,217.00 |
| | *Variance (Total Budget minus- E$AC):* | 11,825.69 |
| | *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 Feb 29, 2024** | *Dollars Projected for Month:* | 96,567.63 |
| | *Actual Dollars Used:* | 87,031.17 |
| | *Variance (Projected minus Actual):* | 9,536.46 |
| | *Reason for Variance:* | The total project amount includes MTF Web Illume as well as Non-Response Calling and Winter Location project. WL projections will be adjusted. |

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

| Project Name | (NDWS) National Dementia Workforce Study (On Track) | | |
|---|---|---|---|
| **Project Mode** | Primary: Not Available | | |
| **Project Type** | Sponsored Projects | | |
| **Budget** | **Direct Budget**: 4,327,548.00 | **Indirect Budget:** 2,423,425.00 | **Total Budget:** 6,750,973.00 |
| **Principal** | Donovan Maust (Michigan Medicine) | | |
| **Investigator/Clients** | Joanne Spetz (University of California, San Francisco) | | |
| | James Wagner (University of Michigan - Survey Research Center) | | |
| **Funding Agency** | NIA | | |
| **IRB** | *HUM#:* | | *Period of Approval:* |
| **Project Team** | *Project Lead:* Margaret Lee Hudson | | |
| | *Budget Analyst:* Nicole Danielle Doher | | |
| | *Production Manager:* | | |
| | *Senior Project Advisor:* Stephanie A Chardoul | | |
| | *Production Manager 1:* Piotr Dworak | | |
| | *Production Manager 2:* Lisa S Holland | | |
| **Proposal #** | no data | | |
| **Description** | The National Dementia Workforce Study (NDWS) will be launched by a national team of experts in clinical care of persons living with dementia, survey research, and health workforce research. The goal of the NDWS data infrastructure is to allow researchers and policymakers to ask and answer scientific questions to help build the workforce of clinicians and other professional care providers required by the growing population of persons living with dementia in the U.S. The Core of NDWS will be four surveys that reflect key elements of the professional dementia care workforce in the U.S.: Community Clinicians, Nursing Home Staff, Home Care Staff, and Assisted Living Staff. In addition to these surveys, the NDWS team will develop a variety of additional data sources that can be linked with the surveys in order to maximize the scientific potential of the surveys. The project's activities will be conducted through five Cores: 1) Administrative; 2) Screening and Survey Instrument; 3) Administrative Data Transfer, Masking, Access, and Ethics; 4) Data Collection, Linkages, Cleaning, and Sharing; and 5) Research Studies. The overall aims are to: 1) Launch a family of four nationally representative professional dementia workforce surveys covering the key care delivery settings in the U.S.; 2) Through the National Dementia Workforce Study, build a data infrastructure surrounding the dementia workforce surveys that allows researchers to generate critical insights into the professional dementia care workforce and associated outcomes for PLWD; and 3) Develop and expand the community of researchers focused on the professional dementia care workforce overall and that use the National Dementia Workforce Study data infrastructure.<br>SRO's work is associate with Cores 2 and 4. | | |
| **SRO Project Period** | 10/2023 - 09/2028 | | |
| **Data Col Period** | | | |
| **Security Plan** | NA | | |

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

| **Other Project Team Members** | Lisa Holland, Gregg Peterson, Raphael Nishimura, Ji Qi, Anna Fuqua-Smith, Liliana Grueber, Dominic Bonanni, |
|---|---|
| **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** | Feb, 2024 (NDWS) | Initiation |
|---|---|---|
| **Risk Level** | On Track | |
| **Monthly Updates** | As we are ramping up SRO work on this effort, here are February activities:<br><br>* Reviewed and scored data collection partner proposals for each of the four surveys.<br>* Initiated sample frame development and created a replicate design for the Assisted Living survey and the Home | |

Care survey.
Downloaded state level licensure information for ALFs from 50 states; began contacting agencies to collect missing data required for the sample frame (e.g., number of beds, contact information).
* Reviewed staff, administrator, and clinician surveys for potential sources of response error, order of items, and to identify content for cognitive interviews.
* Created a cognitive interview protocol including recruitment specifications intended to assure a diverse range of respondent experiences are represented.
* Continue to build the SRO project team.

| Special Issues | | | | |
|---|---|---|---|---|
| **Cost as of Mar 19, 2024** | *Total Cost to Date (direct + indirect):* | | | 134,253.66 |
| | *Est Cost at Completion (E$AC):* | | | 6,609,208.61 |
| | *Total Budget:* | | | 6,750,973.00 |
| | *Variance (Total Budget minus- E$AC):* | | | 0.00 |
| | *Reason for Variance:* | Still getting set up with projections in CRS | | |
| **Projections as of Mar 19, 2024** | *Dollars Projected for Month:* | | | 68,342.49 |
| | *Actual Dollars Used:* | | | 68,342.49 |
| | *Variance (Projected minus Actual):* | | | 0.00 |
| | *Reason for Variance:* | Still getting set up with projections in CRS | | |
| **Measures** | | **Units at Complete** | **RR** | **HPI** |
| | *Current Goal:* | | | |
| | *Goal at Completion:* | | | |
| | *Current Actual:* | | | |
| | *Estimate at Complete:* | | | |
| | *Variance:* | | | |
| **Other Measures** | | | | |

| Project Name | (PR-PSID) Puerto Rico Panel Study of Income Dynamics (Some Concerns) | | |
|---|---|---|---|
| Project Mode | Primary: Face to Face    Secondary: Telephone    Total of Modes: 2 | | |
| Project Type | Sponsored Projects | | |
| Budget | **Direct Budget**: 828,581.00 | **Indirect Budget:** 464,004.00 | **Total Budget:** 1,292,585.00 |
| Principal | Narayan Sastry (University of Michigan) | | |
| Investigator/Clients | Elizabeth Fussel (Brown University) | | |
| Funding Agency | NICHD, with supplemental funding being sought from NIA | | |
| IRB | *HUM#:* HUM00197300 | | *Period of Approval:* 4/5/2022-3/22/24 |
| Project Team | *Project Lead:* Camila Kendall | | |
| | *Budget Analyst:* Ivanna Iavorska-Em | | |
| | *Production Manager:* | | |
| | *Senior Project Advisor:* Stephanie A Chardoul | | |
| | *Production Manager 1:* Camila Kendall | | |
| | *Production Manager 2:* | | |
| Proposal # | no data | | |
| Description | SRO will work with the PIs and a local survey firm in Puerto Rico, Estudios Técnicos (ETI), to develop a sample frame, sample design, questionnaire and data collection protocols for both pilot data collection (in 2022) and baseline data collection (in 2023). DMSS will provide assistance with sample design and implementation, responsive design, panel maintenance issues, and creation of sample weights.  SRO will update the PSID-21 Spanish instrument for use specifically in PR. SRO will assist with the preparation of training materials for Listing training, Pretest and Main Data collection and will travel to PR to be on-site for these trainings. SRO will define reports for production and quality control monitoring that will be programmed through the SurveyTrak system, and train the research team on using these reports. All data will be collected by ETI's interviewers in PR and will be encrypted and transmitted daily via SurveyTrak to a secure SRC server. SRO will also assist with data processing. | | |
| SRO Project Period | 01/2022 - 12/2023 | | |
| Data Col Period | | | |
| Security Plan | NA | | |

| Milestones | | | |
|---|---|---|---|
| | *Pre Production Start:* 10/01/2021 | *Pretest Start:* 02/05/2024 | |
| | *Pretest End:* 03/11/2024 | *Recruitment Start:* | |
| | *Staffing Complete:* | *GIT Start:* 01/30/2024 | |
| | *SS Train Start:* 01/31/2024 | *SS Train End:* 02/02/2024 | |
| | *DC Start:* | *DC End:* | |

| Other Project Team Members | Shonda Kruger-Ndiaye & Camila Kendall -- Co-Project Leads<br>Raphael Nishimura -- Sampling<br>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)<br>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 | Feb, 2024 (PR-PSID) | Initiation |
|---|---|---|
| Risk Level | Some Concerns | |
| Monthly Updates | Pretest Data collection launched on 2/5. Goal is to complete 75 interviews by 3/11.<br><br>A few pretest interviewers reacted strongly to the skin color observation questions that are part of the PR module during the training. The PIs provided additional information and justification for why this component is an important part of the PR-PSID instrument.  IWERs concerns were assuaged.<br><br>ETI reported issues with Blaise interviews crashing. SRO investigated and determined that the crashes seem to be related to Blaise CARI recordings, and navigating too quickly within the instrument.  SRO decided to turn off Blaise | |

CARI recordings, which stopped the crashes. Next step is to test Blaise CARI in Blaise 5.14 to see if we can recreate the issues. If issues with Blaise CARI cannot be resolved, we will explore other options for recording the interviews during Main Data Collection.  SRO recovered the Blaise data from crashed interviews (n=4) from the ADT, and reviewed the restored data before returning the cases to the field.

PR-PSID Management team working with Core Lead to determine the next steps for integrating the PR-PSID and Core instruments. SRO will provide PIs with a cost estimate for the upcoming work, and get guidance on how to charge the time across both projects.

Management team has had to spend more time than expected managing technical issues and facilitating communication between interviewers in PR and the Help Desk/Tech Team. SRO explained to ETI the need for someone that could trouble shoot technical issues and provide HD support from PR -- ETI identified an IWER that could work with our HD to troubleshoot these technical issues.

Worked with ETI to come up with a solution for respondents that could not accept their payment via ATH movil -- will provide these respondents with a Walmart giftcard.

| Special Issues | Slight overrun. Much of the Post Collection Processing that is planned is new for SRO. | |
|---|---|---|
| Cost as of Mar 19, 2024 | Total Cost to Date (direct + indirect): | 582,295.40 |
| | Est Cost at Completion (E$AC): | 1,349,100.04 |
| | Total Budget: | 1,292,585.00 |
| | Variance (Total Budget minus- E$AC): | -56,515.04 |
| | Reason for Variance: | Overrun increased by ~5K between Jan & Feb reports -- mostly due to adding hours for management category to support training and pretest Prod. |
| Projections as of Mar 19, 2024 | Dollars Projected for Month: | 13,560.19 |
| | Actual Dollars Used: | 23,568.09 |
| | Variance (Projected minus Actual): | -10,007.90 |
| | Reason for Variance: | Actuals in tech categories were higher than projected due to all of the technical issues experienced. |

| Measures | | Units at Complete | RR | HPI |
|---|---|---|---|---|
| | Current Goal: | 75 | | |
| | Goal at Completion: | | | |
| | Current Actual: | 41 | | |
| | Estimate at Complete: | | | |
| | Variance: | | | |
| Other Measures | Note -- Current completes are as of 2/29.  As of 3/20, 75 IWs have been completed. | | | |

| | |
|---|---|
| **Project Name** | **(PSID CDS 2023) PSID Childhood Development Supplement 2023 (On Track)** |
| **Project Mode** | Primary: Mixed    Secondary: Face to Face    Total of Modes: 4 |
| **Project Type** | Sponsored Projects |
| **Budget** | **Direct Budget**: 0.00        **Indirect Budget:** 0.00        **Total Budget:** 0.00 |
| **Principal Investigator/Clients** | Narayan Sastry (SRC) |
| **Funding Agency** | |
| **IRB** | **HUM#:** HUM00166316        **Period of Approval:** |
| **Project Team** | **Project Lead:** Piotr Dworak |
| | **Budget Analyst:** Ivanna Iavorska-Em |
| | **Production Manager:** Sarah Crane |
| | **Senior Project Advisor:** Stephanie A Chardoul |
| | **Production Manager 1:** |
| | **Production Manager 2:** |
| **Proposal #** | no data |
| **Description** | A 2023 wave of the Childhood Development Supplement (CDS) is going to be conducted in two phases.  Phase 1: from September 2023 – May 2024 and Phase 2: from June 2024 - January 2025. The sample for CDS is comprised of the PSID-eligible children (ages 0 -17) from the Core 2023 families we interview and their primary caregivers. Approximately 3,700 families will be included, with some Core families containing several CDS children. As part of the CDS Phase 1, families are asked to complete phone coverscreen and PCG interviews followed by mixed Adolescent 12 - 17 phone/web interview (including an IVR component in phone mode).  In Phase 2 families will be visited in person (where possible) and asked to complete Child 8 - 11 interviews (via Video if out of area), provide physical measurements, educational assessments, saliva collection, time diaries, school and birth record linkage forms. CDS interviewing will be conducted by a mix of SSL and Field interviewers. Coverscreen and PCG interviews will be handled by SurveyTrak and Blaise 4.8, Adolescent interviews will be handled by MSMS and Blaise 5. |
| **SRO Project Period** | 08/2022 - 01/2025 |
| **Data Col Period** | 09/2023 - 01/2025 |
| **Security Plan** | NA |

**Milestones**

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

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

-------------------------------------------------------------------------------------------------

| | | |
|---|---|---|
| **Report Period** | Feb, 2024 (PSID CDS 2023) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | CDS data collection launched in January.  So far things are going well, no concerns at this time. | |
| | Data collection (goal / actual): | |
| | We are behind on stated goals but ahead in comp % compared to past waves suggesting our goals were too aggressive and warrant adjustment. | |
| | - CS: 1442 / 1703<br>- PCG: 946 / 1166<br>- Adolescents: 295 / 487 | |

This week we are rolling out email/text reminders to some CS/PCG cases and additional mailing with $2 to the CS FU respondents. On April 1st, we will begin offering $10 for completing a CS followed by other interventions.

Staff:
One interviewer has been removed after dropping entirely out of communication.
-- 47 interviewers + 2 locators (no attrition after the training) (
The production team is working with DCS to retrieve SRO hardware.
-- CDS staff is shared with other projects (PSID Saliva, MTF, BFY, etc.)

Sample:
All sample but the TAS overlap cases had been released:
-- Release 1:  2260 (34 Spanish)
-- Release 2: 759 (66 Spanish)
-- Release 3: 143 (Just released March 21)
-- Release 4: ~ 41 cases overlapping with TAS and TAS not yet completed.

IVR update:

Ongoing technical issues with the IVR appear to have been solved (more details below). We completed 21 IVRs out of 25 cases with 4 cases having a known reason for not completing the IVR which is not related to technical issues (GDRP,  special condition, or refusal).


IVR phone not working (status = fixed):  After launch on Wed 3-6 the production 1-800 IVR phone went down, was fixed, and then went down again. We followed up at all levels highlighting the increasing cost of those errors to the multi-million dollar project. We always received good attention to our request but involved Gregg anyway. As we found out, the Training/Testing project (not something typically done by the Vendor) was set up in a way that it was conflicting with the Prod project and it resulted in server errors. Enghouse released a software patch which fixed the error and we have not experienced downtime since.

Breakoffs (status = fixed):  We observed a high number of break-offs to questions J22 - 34. It is a series of questions which starts with "In the past 6 months have you … ". Of 8 attempts at that time 4 Rs had issues getting through that section. Rs were trying to answer the question before the full text was read and our instruction in those cases was to repeat the question which then prompted another attempt to answer and eventual break-off. A change was made on Tuesday 3-12 to allow entering the answer after the stem of the question was read and since we had 4 "clean" no-break-off IVRs completed and no more reports on this issue.

Most Rs who had the issue went back and completed the IVR.  For 1 R who tried to complete 3 times before the fix was made and was getting frustrated we suggested a $15 compensation to attempt again.
We also instructed iwers to remind Rs to listen to all the question text before selecting the answer.

Phase 2 Planning work in progress:

Sampling: work on estimating clusters / out of cluster sample and iwer coverage with the current CDS staff.
Proposal / Budgeting:  draft proposal should be ready for INTERNAL review shortly.
Staffing:
- PDMG should be able to secure staff
- TSG should be able to start work in May (given specs from IDPM)
- we need to hear back form DCO about the prospect for hiring and training in late summer/early fall.

SRO did not yet promise any timeline to the PI whose wish would be to start data collection in the Fall 2024.

| Special Issues | | | |
|---|---|---|---|
| **Cost as of Mar 19, 2024** | *Total Cost to Date (direct + indirect):* | | 1,107,426.56 |
| | *Est Cost at Completion (E$AC):* | | 4,637,027.47 |
| | *Total Budget:* | | 0.00 |
| | *Variance (Total Budget minus- E$AC):* | | -4,637,027.47 |
| | *Reason for Variance:* | Our total Phase 1 budget (Aug-22 through end of Phase 1 (Aug-24) and close-out) is estimated @ $3.3M direct. There is however a strong possibility that some form of Phase 2 (at home) will be added. | |
| **Projections as of Mar 19, 2024** | *Dollars Projected for Month:* | | 529,384.51 |
| | *Actual Dollars Used:* | | 456,143.56 |
| | *Variance (Projected minus Actual):* | | 73,240.95 |
| | *Reason for Variance:* | In February, we projected to spend $529 (direct + indirect) and spent $456K. | |

| Measures | | Units at Complete | RR | HPI |
|---|---|---|---|---|
| | *Current Goal:* | n/a | n/a | n/a |
| | *Goal at Completion:* | n/a | n/a | n/a |
| | *Current Actual:* | n/a | n/a | n/a |
| | *Estimate at Complete:* | n/a | n/a | n/a |
| | *Variance:* | n/a | n/a | n/a |
| Other Measures | CDS tracks goals for 3 different sample sizes - the goals are reported in the text write up above. | | | |

| | | | |
|---|---|---|---|
| **Project Name** | **(PSID TAS 2023) Transition to Adulthood within its Life Course & Intergenerational Family Context (On Track)** | | |
| **Project Mode** | Primary: Web    Secondary: Telephone    Total of Modes: 2 | | |
| **Project Type** | Sponsored Projects | | |
| **Budget** | **Direct Budget**: 934,249.00 | **Indirect Budget:** 523,179.00 | **Total Budget:** 1,457,428.00 |
| **Principal Investigator/Clients** | Narayan Sastry (U-M PSC SRC) | | |
| **Funding Agency** | | | |
| **IRB** | *HUM#:* 00112629 | | *Period of Approval:* |
| **Project Team** | *Project Lead:* Elizabeth Ohryn | | |
| | *Budget Analyst:* Ivanna Iavorska-Em | | |
| | *Production Manager:* Narine Verdiyan | | |
| | *Senior Project Advisor:* Stephanie A Chardoul | | |
| | *Production Manager 1:* Daric Thorne | | |
| | *Production Manager 2:* | | |
| **Proposal #** | no data | | |
| **Description** | TAS 2023 is the 10th Wave of TAS study, part of the PSID Suite of projects.<br><br>Approximately 3,000 youth aged 18 - 28 years who are part of families who participate in the ongoing Panel Study of Income Dynamics (PSID) are invited to take part in a 60-minute web survey. In 2023, all respondents go through the same sequential treatment - non-responders to web survey are called as part of the non-response follow up. Respondents will be offered a up to $145 for completing the interview which includes a $75 base payment and possible other interventions.  Phone interviews will be completed by Survey Research Center Survey Services Lab (SSL) interviewers. | | |
| **SRO Project Period** | 05/2023 - 07/2024 | | |
| **Data Col Period** | 10/2023 - 05/2024 | | |
| **Security Plan** | NA | | |

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

| | |
|---|---|
| **Other Project Team Members** | PSID Suite SRO Lead - Shonda Kruger-Ndiaye; TSG Tech Leads - Jim Rodgers, Laura Yoder, and Jeff Smith; Data Manager - Rose Zybel; Blaise Programmer - Youhong Liu; Portal - Jude Perillo MSMS Programmers - Pam Swanson and Darnell Christian; Help Desk Support - Kyle Goodman; Testing Coordinator and project support - Camila Kendall; Project/Production Support - Jaime Koopman, Sarah Crane, Xiomara Lorenzo-Guerra & Liliana Grueber; Reporting - Piotr Dworak and Ruyi Chen |
| **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** | Feb, 2024 (PSID TAS 2023) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | Summary of February Activities | |

Production
 o TAS production continues slightly ahead of goals with 1928 total completes, which is 57 ahead of the cumulative goal at the end of February.
 o Continue to think creatively about ways to reach out to Rs. Including sibling outreach, mindful boosts to TOA, and a unique spring NMI.

Management
 o Team QCed middle wave offer templates.  Edits and additional QC planned to ensure a timeline start for these

offers for Rel 1 in March.

Staffing and Training
 o No interviewer attrition.

Technical
 o The project released Rel 3 on 2/1/24 and Rel 4 on 2/15/24.
 o Adding a pay match variable to help track pay matches. This will allow for easier tracking when time-limited offers are extended to Rs.

| Special Issues | | | | |
|---|---|---|---|---|
| **Cost as of Mar 19, 2024** | *Total Cost to Date (direct + indirect):* | | | 791,996.96 |
| | *Est Cost at Completion (E$AC):* | | | 1,378,642.15 |
| | *Total Budget:* | | | 1,457,428.00 |
| | *Variance (Total Budget minus- E$AC):* | | | 78,785.85 |
| | *Reason for Variance:* | Technology costs continue to be lower than projected with some allocations removed. While some further mailing projections may be added once Rel4 numbers are known, another area requiring further review is project/production management to ensure the project is correctly allocated at the level being worked. | | |
| **Projections as of Mar 19, 2024** | *Dollars Projected for Month:* | | | 160,981.29 |
| | *Actual Dollars Used:* | | | 125,114.71 |
| | *Variance (Projected minus Actual):* | | | 35,866.58 |
| | *Reason for Variance:* | Technology and management costs came in lower than projected. | | |

| Measures | | Units at Complete | RR | HPI |
|---|---|---|---|---|
| | *Current Goal:* | | | |
| | *Goal at Completion:* | | 89% | |
| | *Current Actual:* | 1928 | 66% | 2.2 |
| | *Estimate at Complete:* | | | 3.7 |
| | *Variance:* | | | |
| Other Measures | | | | |

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

| **Milestones** | | | | |
|---|---|---|---|---|
| | *Pre Production Start:* 03/01/2022 | | *Pretest Start:* 10/11/2022 | |
| | *Pretest End:* 10/31/2022 | | *Recruitment Start:* 09/19/2022 | |
| | *Staffing Complete:* 04/21/2023 | | *GIT Start:* 06/05/2023 | |
| | *SS Train Start:* 03/08/2023 | | *SS Train End:* 06/11/2023 | |
| | *DC Start:* 03/23/2023 | | *DC End:* 04/30/2024 | |

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

| Report Period | Feb, 2024 (PSID23) | | Implementing |
|---|---|---|---|

| Risk Level | Some Concerns |
|---|---|

| Monthly Updates | Summary of February 2024 Activities |
|---|---|

Interview Debriefings
2/1: Field Leaders. 2/8: Locators. 2/21: Tech Team.

Recovered Missing Blaise Data
Recovered data from Merge History. Redelivered on 2/29. 73 SIDs affected - 69 SIDs due to opening survey in 2024. Identified code change to prevent change in year issue from happening in the future.

OCC/IND Coding
On-going. Expected to complete by mid-March.

IRB
2/7: Full committee review of ORIO where iwer provided R with another R's web survey credentials. ORIO acknowledged. Removing credentials from DCA in 2025. Iwer can email/text authenticated link to Rs.

Saliva Collection
Launched Batch 15 (last sample batch) on Feb 2.
Increased FTF effort. Visited ~1/3 of projected FTF FUs. Email/mail, text, & call in advance of visit but no appt. Made contact w/ ~1/3.
Overall stats: ~1/2 FUs are finalized. ~1/5 of participants provided saliva samples (goal: 44%).

2025 Interview
Began planning with PIs and project/tech leads.

Delivered 2025-2026 Proposals
2/9: Saliva Supplement & Off-Wave Supplement. 2/12: Spouse-Partner Interview (PIs decided not to submit).

| Special Issues | Saliva data collection (including FTF visits) started later than originally planned. Saliva FTF effort will continue into April--extending data collection by two months. |
|---|---|

| Cost as of Mar 21, 2024 | Total Cost to Date (direct + indirect): | 5,218,846.95 |
|---|---|---|
| | Est Cost at Completion (E$AC): | 5,771,372.84 |
| | Total Budget: | 6,235,802.00 |
| | Variance (Total Budget minus- E$AC): | 464,429.16 |
| | Reason for Variance: | Main driver of underrun: Less interviewer effort (~$429K). Note: CRS has the main iw and saliva budgets loaded. Unable to separate Core IDC costs from Contact Update IDC costs. Cost values only reflect Direct Costs. |

| Projections as of Mar 21, 2024 | Dollars Projected for Month: | 249,925.25 |
|---|---|---|
| | Actual Dollars Used: | 160,497.70 |
| | Variance (Projected minus Actual): | 89,427.55 |
| | Reason for Variance: | Main drivers of underrun: Saliva kit purchase did not hit (~$24K). Minimal FTF effort occurred in Feb (~$20K travel). Minimal duplicating costs (~$17K). Note: Unable to separate Core IDC costs from Contact Update IDC costs. Cost values only reflect Direct Costs. |

| Measures | | Units at Complete | RR | HPI |
|---|---|---|---|---|
| | Current Goal: | | | |
| | Goal at Completion: | 9646 | 89% | 6.58 |
| | Current Actual: | 9189 | 86% | 5.59 |
| | Estimate at Complete: | | | |
| | Variance: | 457 | 3% | 0.99 |

| Other Measures | Notes for Measures Above: |
|---|---|

From Dashboard. Units Completed = 9189 iws (2476 CATI--27%, 6713 web--73%). Sample Invited = 10,928.

BUDGET ASSUMPTIONS:
Mode of completion: 60% web & 40% CATI; Of the web completes, 38% do not require any interviewer effort.
HPI: 5.42 = CATI completes; 7.21 = web completes w/ interviewer follow-up; 10.17 = non-sample/non-iw. Additional 1.74 HPI for FTF NRFU cases.

| Project Name | **(SCA 2024) Surveys of Consumer Attitudes (On Track)** | | |
|---|---|---|---|
| **Project Mode** | Primary: Mail      Total of Modes: 1 | | |
| **Project Type** | Sponsored Projects | | |
| **Budget** | **Direct Budget**: 680,222.00 | **Indirect Budget:** 0.00 | **Total Budget:** 680,222.00 |
| **Principal Investigator/Clients** | | | |
| **Funding Agency** | | | |
| **IRB** | *HUM#:* | | *Period of Approval:* |
| **Project Team** | *Project Lead:* Theresa Camelo | | |
| | *Budget Analyst:* Dean E Stevens | | |
| | *Production Manager:* William Keating | | |
| | *Senior Project Advisor:* Shonda R Kruger-Ndiaye | | |
| | *Production Manager 1:* Lisa J Carn | | |
| | *Production Manager 2:* | | |
| **Proposal #** | no data | | |
| **Description** | The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations.<br><br>The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 600 interviews. | | |
| **SRO Project Period** | 01/2024 - 06/2024 | | |
| **Data Col Period** | | | |
| **Security Plan** | NA | | |

| **Milestones** | | | |
|---|---|---|---|
| *Pre Production Start:* | | *Pretest Start:* | |
| *Pretest End:* | | *Recruitment Start:* | |
| *Staffing Complete:* | | *GIT Start:* | |
| *SS Train Start:* | | *SS Train End:* | |
| *DC Start:* 01/02/2024 | | *DC End:* 06/30/2024 | |

| Other Project Team Members | |
|---|---|
| **Other Project Name** | |
| **Sample Mgmt System** | SMS |
| **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 | Feb, 2024 (SCA 2024) | Initiation |
|---|---|---|
| **Risk Level** | On Track | |
| **Monthly Updates** | SCA FEB 2024 began a day earlier than scheduled on Monday 01/29/2024 (due to the JAN month ending a day earlier than scheduled, and ended as scheduled, Monday 2/26/2024.<br><br>We completed 602 interviews in February 2024 (323/175/104), 2 interviews above our goals of 600 (320/181/100), though 5 IWs short of our RECON goal of 180. This shortfall in RECON interviews was anticipated and the adjusted goals were approved by the PIs.<br><br>The cumulative HPI for the month was 3.74 (.54 higher than our budgeted goal of 3.20), a return to the higher than budgeted HPIs experienced over the last several months (with the exception of JAN 2024). Despite this increase we are projecting an underrun for the CY 2024. | |
| **Special Issues** | | |
| **Cost as of Mar 19, 2024** | *Total Cost to Date (direct + indirect):* | 193,588.33 |

| | | |
|---|---|---|
| *Est Cost at Completion (E$AC):* | | 626,480.00 |
| *Total Budget:* | | 680,222.00 |
| *Variance (Total Budget minus- E$AC):* | | 69,903.00 |
| *Reason for Variance:* | A training budgeted for JAN was postponed until APR | |

| Projections as of Mar 19, 2024 | | |
|---|---|---|
| *Dollars Projected for Month:* | | 113,442.19 |
| *Actual Dollars Used:* | | 108,737.07 |
| *Variance (Projected minus Actual):* | | 4,705.12 |
| *Reason for Variance:* | Lower than budgeted PM hours were charged | |

| Measures | | Units at Complete | RR | HPI |
|---|---|---|---|---|
| | *Current Goal:* | 600 | | 3.2 |
| | *Goal at Completion:* | 600 | | 3.2 |
| | *Current Actual:* | 602 | | 3.74 |
| | *Estimate at Complete:* | 602 | | 3.74 |
| | *Variance:* | 2 | | .54 |

**Other Measures**

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

| **Milestones** | | | |
|---|---|---|---|
| *Pre Production Start:* 09/01/2022 | | *Pretest Start:* | |
| *Pretest End:* | | *Recruitment Start:* 02/01/2023 | |
| *Staffing Complete:* 04/10/2023 | | *GIT Start:* 05/16/2023 | |
| *SS Train Start:* 05/18/2023 | | *SS Train End:* 05/25/2023 | |
| *DC Start:* 05/30/2023 | | *DC End:* 12/31/2024 | |

| | |
|---|---|
| **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** | Feb, 2024 (SRS 2021) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | BLUF  The PIs reduced the expected number of completes on Social Relations. We believe that the new goal of 1100 newly screened cases plus 244 panel cases can be completed within the existing budget. We will continue to monitor production and costs.  Production has been extended to 12/31/2024.<br><br>On Feb 22, the PIs proposed a new target for newly screened cases on Social Relations – 1100 cases.  SRO provided a ballpark budget on Feb 29 that indicated that completing 1100 cases (instead of the original 3400 cases) and extending production through 12/31/2024 would fit within available funds.  The PIs affirmed this new goal on March 14.<br><br>Screening continues to be very difficult for SRS, with some areas being very hostile to minority interviewers (or to any interviewers), and the screening response rates in low-MENA areas is low.  Interviewers have been gaining | |

some ground in converting screened-in cases to completed cases.  In the last month, interviewers have been able to increase the main response rate from 48% to 52%.

In mid-January, the research team approved moving forward with preparation for release of panel cases, and with hiring screening interviewers. The SRO team has been working with the LCD team to finalize the panel sample preload and cases.  We expect to release panel cases in early April, pending IRB approval.

SRO is also moving forward with a screener end-game protocol, and development of a web application to gather household rosters.  Details are still being worked out for this, since the web application is not integrated with the Blaise survey instruments.

Projections for the study have been reviewed and are being revised to comply with the ballpark budget for the lower number of completes.

| | |
|---|---|
| **Special Issues** | |
| | The CRS totals do not match what appears in the 3/20/2024 cost report.  I have input the numbers from the cost report into MPR. |
| **Cost as of Mar 20, 2024** | **Total Cost to Date (direct + indirect):** |
| | 2,733,814.82 |
| | **Est Cost at Completion (E$AC):** |
| | 5,876,431.21 |
| | **Total Budget:** |
| | 5,876,610.11 |
| | **Variance (Total Budget minus- E$AC):** |
| | 178.90 |
| | **Reason for Variance:** |
| | NOTE -- the data uploaded to CRS does not match the project cost report.<br><br>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 Mar 20, 2024** | **Dollars Projected for Month:** |
| | 383,574.57 |
| | **Actual Dollars Used:** |
| | 262,728.64 |
| | **Variance (Projected minus Actual):** |
| | 120,845.93 |
| | **Reason for Variance:** |
| | The non-salary variance for the month was just under $4,622 direct cost, which is insignificant for a project of this size.  The salary variance was $72,843 direct cost.  This variance stems from a projection of $78,000 in research salaries, which held unallocated funds for interviewing costs.  Interviewers are not working to their hours commitments and continued attrition is impacting hours as well. Both have been causing underruns in projections.  We have just rebudgeted the study with a new goal. We hope that spending will be more in line with expectations in the future. |

| Measures | | Units at Complete | RR | HPI |
|---|---|---|---|---|
| | **Current Goal:** | 1100 new, 244 panel | 88% scr, 75% main | 10.4 with screening |
| | **Goal at Completion:** | 1344 | | |
| | **Current Actual:** | 773 new, 0 panel | 29% scr, 52% main | 20.7 with screening |
| | **Estimate at Complete:** | | | |
| | **Variance:** | | | |
| **Other Measures** | Production is reported as of 3/21/2024.<br>RR shown above reflect completion based on the released sample.<br>Current length 129 minutes, budgeted 140 minutes.<br>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** | 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.<br><br>The STARRS models were developed by working with a sample of approximately 15,000 STARRS survey respondents who were interviewed initially when they were on active duty and then followed and reinterviewed after they became Veterans. Several hundred of these STARRS Veterans became homeless after separation. A second aspect of the research is for 50-100 of these Veterans to be recruited to participate in a follow-up focused qualitative interview designed to elicit information about the ways VA might be able to improve transitional services for soldiers at high risk of homelessness after leaving active service and becoming Veterans. With a subcontract from HMS, the U-M Survey Research Center (SRC) Survey Research Operations (SRO) will recruit STARRS-LS respondents for the qualitative interviews, carry out the interviews, transcribe and de-identify the interviews, and link the de-identified/coded interview transcripts to existing de-identified/coded survey data files for these respondents. The HMS STARRS team will then carry out content analysis of these transcripts to elicit information that might help the VA HEARTH team further design their interventions. | | |
| **SRO Project Period** | 05/2023 - 02/2024 | | |
| **Data Col Period** | 10/2023 - 02/2024 | | |
| **Security Plan** | Yes | | |

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

| **Other Project Team Members** | Meredith House - STARRS LS Survey Director<br>Margaret Hudson - Project Manager<br>Derek Dubuque - Scheduler<br>Austin De Spirito - Interview Redaction and QC<br>4 temp research technicians hired for qualitative interviews<br>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 | Feb, 2024 (STARRS-LS VA HEARTH) | Closing |
|---|---|---|
| **Risk Level** | On Track | |
| **Monthly Updates** | We completed data collection and wrapped up the HEARTH project in February. <br> ? We continued to have appointments scheduled through February 11, though only 1 of 2 scheduled interviews were completed. <br> ? We completed a total of 55 interviews on the project. <br> ? All remaining transcripts were redacted for PII and transferred to Harvard's secure server. <br> ? The student interviewers completed theme coding on all but 8 transcripts and these were transferred to Harvard as well. <br> ? Interviewer (staffing) appointments were terminated at the end of the month. <br> ? TOA payments were reconciled and the accounts closed with Tango and ISR business office. | |

| Special Issues | | |
|---|---|---|
| **Cost as of Mar 19, 2024** | *Total Cost to Date (direct + indirect):* | 64,399.54 |
| | *Est Cost at Completion (E$AC):* | 64,399.54 |
| | *Total Budget:* | 89,942.00 |
| | *Variance (Total Budget minus- E$AC):* | 25,542.46 |
| | *Reason for Variance:* | Fewer interviews completed than budgeted (fewer hours + TOA $) |
| **Projections as of Mar 19, 2024** | *Dollars Projected for Month:* | 13,591.46 |
| | *Actual Dollars Used:* | 8,944.00 |
| | *Variance (Projected minus Actual):* | 4,647.46 |
| | *Reason for Variance:* | |

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

| Project Name | **(STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study (On Track)** | | |
|---|---|---|---|
| **Project Mode** | Primary: Web    Secondary: Telephone    Total of Modes: 2 | | |
| **Project Type** | Sponsored Projects | | |
| **Budget** | **Direct Budget**: 8,809,515.00 | **Indirect Budget:** 4,920,601.00 | **Total Budget:** 13,730,116.00 |
| **Principal** | James Wagner (University of Michigan) | | |
| **Investigator/Clients** | Robert Ursano (Uniformed Services University of the Health Scienc) | | |
| | Murray Stein / Ron Kessler (University of California San Diego / Harvard) | | |
| **Funding Agency** | Department of Defense | | |
| **IRB** | **HUM#:** HUM00180765 | | **Period of Approval:** 4/5/23 - 4/4/24 |
| **Project Team** | **Project Lead:** Meredith A House | | |
| | **Budget Analyst:** William Lokers | | |
| | **Production Manager:** Ruth B Philippou | | |
| | **Senior Project Advisor:** Lisa S Holland | | |
| | **Production Manager 1:** Jeffrey Albrecht Jr | | |
| | **Production Manager 2:** Lisa M Lewandowski-Romps | | |
| **Proposal #** | no data | | |
| **Description** | This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.

For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data.

To date, we have completed 2 waves of STARRS-LS interviewing. During Wave 1, we attempted to contact 50,000 individuals and completed approximately 14,500 full interviews. All Wave 1 participants that completed a full Wave 1 interview were asked to participate in Wave 2. Waves 3 and 4, which are covered in this application, will include the full STARRS-LS Wave 2 sample, regardless of whether they completed the interview.

In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys). | | |
| **SRO Project Period** | 05/2020 - 04/2025 | | |
| **Data Col Period** | 11/2022 - 04/2024 | | |
| **Security Plan** | Yes | | |

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

| **Other Project Team Members** | Ryan Yoder, Keith Liebetreu, Becky Loomis, Steven Sonoras, 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 | Feb, 2024 (STARRS-LS Waves 3 & 4) | Implementing |
|---|---|---|
| Risk Level | On Track | |
| Monthly Updates | Activities for February 2024 include: | |

Project Management and Planning:
? We sent weekly production updates to the PIs, and reported on progress on the call with the Army/M&RA.
? Meredith created the agenda/notes and facilitated the weekly meeting with the STARRS project managers.
? We carried out bi-weekly meetings with M&RA to coordinate Safety Plan and respondent locating activities.
? James and Meredith reviewed and provided edits/comments on the 5-year research plan for 2025-2030 ahead of it being sent to M&RA and the GSC Executive Committee.
? Budget/Funding:
o We submitted an account change request for a no cost extension for Year 4 and awaited approval from HJF.
o We awaited word from USUHS that the Year 5 budget has been approved.
? IRB:
o We submitted a continuing review for the current STARRS-LS IRB protocol on February 28.
o We continued planning for the Wave 5 IRB protocol. The current target date for submission is May 17.
? STARRS-affiliated, but not STARRS funded, work:
o VA/HEARTH project:
? Work on the project was completed in February. We completed a total of 55 interviews. All remaining transcripts were redacted for PII and transferred to Harvard's secure server. The student interviewers completed theme coding on all but 8 transcripts and these were transferred to Harvard as well.

Enclave and User Support:
? Annual DoD security training: Completed training renewal materials were due on January 31. As of the end of the month, we were tracking one user who was still working to complete their training.
? The annual update to the SSN-LinkageID list was completed. The file was transferred to AAG on February 26. M&RA confirmed receipt and transferred to Dr. Mason for processing.
? Standard Enclave activities continued.  These include maintaining security requirements; processing background checks and Great Lakes Cluster (GLC) user access requests, drop box requests, ID swap and data transfer requests; managing software acquisition and updates; and providing user support as needed. Of particular note this month:
o We tracked progress on DUA creation with Jordan Smoller at MGB. We provided Harvard with the data transfer memo requirements in preparation for the transfer of STARRS-LS COVID data for Dr. Smoller's research.
o We assisted Dr. Dempsey with questions she and her team had related to a discrepancy between the current/recent age and the past 30 days items in the SHOS-B Next of Kin survey data.
o A set of 2021 administrative data construct files was transferred from AAG to U-M on February 13 and made available on the Enclave.
o One new U-M staff member was onboarded to the U-M Enclave.
? Biomarker group request for assistance:
o Work continued on Dr. Stein's request to send new variables to the Psychiatric Genomics Consortium (PGC) server. The U-M team worked with the data file creator to understand file contents and remove extraneous records in the file from SHOS-A. An updated memo will be circulated for PI approval after the issue has been resolved.

Public Use Data:
? Biosample flags, administrative variables, and inventory document:
o ICPSR continued work.  We are targeting early June for the biosample flags and administrative data to be released. 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 March 1, 2024, are as follows:
o Replicates released: 14 of 14 released with 14,396 sample lines.
o Completed interviews: 10,458 (9,841 web; 617 phone)
o Replicate 12 ended production on February 9 with a final response rate of 75.1%, meeting the wave average and surpassing the Wave 3 response rate of 72.7%.
o Replicate 13 transitioned from Phase 3 to Phase 4 on February 18. Throughout the month, Replicate 13 trended with the Wave 4 average response rate. As of March 1, the response rate was 67.2%.
o Replicate 14 was released on February 5 and transitioned to Phase 3 February 28. As of March 1, the response rate was 39.5% and tracking between 3 and 4 percentage points lower than the average Wave 4. However, it was slightly ahead of the Wave 3 response rate for the same time point in the protocol.
o The response rate for completed replicates (Reps 1-12) is 75.3%.

Safety Plan Results:
? The Wave 4 Safety Plan rate is 12.8% as of March 1.

Wave 5 Plans and Progress:
? The team started planning for Wave 5 by drafting development timelines, designating responsibilities for staff, and holding discussions related to survey instrument and technical systems.

| Special Issues | (Internal U-M) |
|---|---|
| | Lisa H and Meredith met with Stephanie C to talk about committing to months 1-4 of W5 data collection (in addition to W5 pre-production) without the guarantee of continued funding. |
| | ? We noted that the annual funding/award cycle is the same, but that the end of Year 5 is different from the yearly transitions to date because a) we don't yet have a new multi-year proposal/agreement in place and b) we do not expect to have carry forward money at the end of Feb 2025 for continued Wave 5 production work (the expected 2-month Year 5 NCE only covers 2 months of management, enclave and the final month of Wave 4 public use release). |
| | ? We talked about determining a date (August 2024?) by which we will need to have a new agreement of sorts in place in order to continue working. |
| | ? Henry M Jackson (HJF) has been willing to issue letters of intent to fund each year and we have both set up and not set up hardships depending on timing, ORSP recommendation, etc. Stephanie noted she is comfortable with a hardship because that is a guarantee of funding. But a hardship has to be issued against a proposal on file with the university. |
| | ? We have fully ballparked Wave 5 (not only Year 1 of W5) and that we could easily turn this into a formal budget. |
| | ? The general take-away was that we will need to have a formal proposal agreement in place by a certain date (TBD). This could be a formal budget for only Wave 5 or for the next 5-year "funding" period if we can get that far with determining scope with the research team, GSC and Army. |
| | March Preview: |
| | James W, Stephanie. Lisa H, Bill and Meredith met to review a pictorial budget and funding timeline and a document describing the issues and providing background. Two targeted areas Meredith will follow up with USUHS/HJF about are: |
| | 1. SRO will likely experience a gap in funds for continued Wave 5 data collection work starting March 2025 and for Management and Enclave work starting May 2025 until the Year 6 POP award is received (projected to be August 2025 based on past years). |
| | a. SRO and the university are unlikely to authorize a hardship account for more than 2 (maybe 3) months in length. |
| | b. Is supplemental funding an option? |
| | 2. SRO's standard operating procedure is to have a proposal on file with the university that represents the full scope of work for a project (or defined portion of a larger project). At this time, this would be the full scope of work for Wave 5 submitted via a formal proposal package. |
| | a. Like under the current 5-year proposal, the awards can still be annual. The proposal on file is like an "umbrella" for the annual awards. |
| | In setting up the meeting to discuss these issues, Josh Ruff (USUHS/HJF finance person) said he was already anticipating U-M might have a gap in funding between Years 5 and 6. |

| Cost as of Jan 31, 2024 | Total Cost to Date (direct + indirect): | | 10,206,961.21 |
|---|---|---|---|
| | Est Cost at Completion (E$AC): | | 13,747,668.99 |
| | Total Budget: | | 13,730,116.00 |
| | Variance (Total Budget minus- E$AC): | | -17,552.99 |
| | Reason for Variance: | We determined no projections updates were needed this month. The final projected variance is now an overrun of $17,553 (compared to an underrun of $5,862 last month). | |

| Projections as of Jan 31, 2024 | Dollars Projected for Month: | | 296,990.80 |
|---|---|---|---|
| | Actual Dollars Used: | | 302,004.56 |
| | Variance (Projected minus Actual): | | -5,013.76 |
| | Reason for Variance: | We projected $296,991 and spent $302,005 ($5,014 more). The largest variances in the monthly spending were ~$3K less in SurveyTech I costs and ~$5.8K more in Rpay, but overall costs balanced themselves out. | |

| Measures | | Units at Complete | RR | HPI |
|---|---|---|---|---|
| | Current Goal: | 10,800 | 75 | 10.2 |
| | Goal at Completion: | 10,800 | 75 | 10.2 |
| | Current Actual: | 10,458 | 75.3 (Reps 1-12) | 12.4 |
| | Estimate at Complete: | 10,800 | 75 | 12 |
| | Variance: | | | -1.8 |

**Other Measures**

# Developmental/Initiative Projects Dashboard

## NonArchived Development Initiative and No-DataCol Projects

| Project | Type | Phase | Project Lead | Jan | Feb |
|---|---|---|---|---|---|
| TSME24 DCO System Support (483248) | Initiatives | Implementing | Vivienne Y Outlaw | 🟡 | 🟡 |
| TSME24 MSMS performance work (425267) | Initiatives | Initiation | Jim Rodgers | 🟢 | 🟢 |
| TSME24 MSMS Working Group (425197) | Initiatives | Initiation | Kelly A Chatain | 🟢 | 🟢 |
| TSME24 QC Systems (483249) | Initiatives | Implementing | Sarah Elisa Broumand | 🟢 | 🟢 |
| TSME24 SRO System Maintenance - General (483910) | Initiatives | Implementing | Jeffrey L Smith | 🟢 | 🟢 |
| TSME24 SSL Autoscheduler interface development (42 | Initiatives | Initiation | Debbie Seale | 🟢 | 🟢 |
| TSME24 STrak: Migration to SQL Anywhere V17 ( | Initiatives | Initiation | Lawrence Daher | 🟡 | 🟡 |

| Project Name | **(TSME24 DCO System Support (483248)) TSME24 DCO System Support (483248) (Some Concerns)** | | |
|---|---|---|---|
| Project Mode | Primary: Not Available | | |
| Project Type | Developmental Initiatives | | |
| Budget | **Direct Budget**: 35,000.00 | **Indirect Budget:** 0.00 | **Total Budget:** 35,000.00 |
| Principal | | | |
| Investigator/Clients | | | |
| Funding Agency | | | |
| IRB | *HUM#:* | | *Period of Approval:* |
| Project Team | *Project Lead:* Vivienne Y Outlaw | | |
| | *Budget Analyst:* Ivanna Iavorska-Em | | |
| | *Production Manager:* | | |
| | *Senior Project Advisor:* | | |
| | *Production Manager 1:* | | |
| | *Production Manager 2:* | | |
| Proposal # | no data | | |
| Description | To be determined | | |
| SRO Project Period | 07/2023 - 06/2024 | | |
| Data Col Period | | | |
| Security Plan | NA | | |

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

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

----------------------------------------------------------------------------------------------

| Report Period | Feb, 2024 (TSME24 DCO System Support (483248)) | Implementing |
|---|---|---|
| Risk Level | Some Concerns | |
| Monthly Updates | 1. Continue to support and revise the TeamTailor download and Geocoding upload modules.<br>2. Add years of service hire date and report<br>3. Add bilingual certification to reports<br>4. Add committed hours to Staff notification email<br>5. Add CHIP pay differential and add this variable to all the reports<br>6. Change umich to sro id for EMS report<br>7. Investigated workscope for Footprint to TeamDynamix transition | |
| Special Issues | | |

| Cost as of Mar 08, 2024 | *Total Cost to Date (direct + indirect):* | | 23,614.93 |
|---|---|---|---|
| | *Est Cost at Completion (E$AC):* | | 33,130.81 |
| | *Total Budget:* | | 35,000.00 |
| | *Variance (Total Budget minus- E$AC):* | | 1,869.19 |
| | *Reason for Variance:* | x | |
| Projections as of Mar 08, 2024 | *Dollars Projected for Month:* | | 5,879.22 |

| | | Actual Dollars Used: | | | 4,540.99 |
| --- | --- | --- | --- | --- | --- |
| | | Variance (Projected minus Actual): | | | 1,338.23 |
| | | Reason for Variance: | x | | |

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

**Other Measures**

| Project Name | **(TSME24 MSMS performance work (425267)) TSME24 MSMS performance work (425267) (On Track)** | | |
|---|---|---|---|
| **Project Mode** | Primary: Not Available | | |
| **Project Type** | Developmental Initiatives | | |
| **Budget** | **Direct Budget**: 1.00 | **Indirect Budget:** 0.00 | **Total Budget:** 1.00 |
| **Principal** | | | |
| **Investigator/Clients** | | | |
| **Funding Agency** | | | |
| **IRB** | *HUM#:* | | *Period of Approval:* |
| **Project Team** | *Project Lead:* Jim Rodgers | | |
| | *Budget Analyst:* Ivanna Iavorska-Em | | |
| | *Production Manager:* | | |
| | *Senior Project Advisor:* | | |
| | *Production Manager 1:* | | |
| | *Production Manager 2:* | | |
| **Proposal #** | no data | | |
| **Description** | To be determined | | |
| **SRO Project Period** | 07/2023 - 06/2024 | | |
| **Data Col Period** | | | |
| **Security Plan** | NA | | |

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

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

--------------------------------------------------------------------------------------------

| **Report Period** | Feb, 2024 (TSME24 MSMS performance | Initiation |
|---|---|---|
| **Risk Level** | On Track | |
| **Monthly Updates** | Proceeding as planned | |
| **Special Issues** | | |
| **Cost as of Feb 29, 2024** | *Total Cost to Date (direct + indirect):* | 41,944.00 |
| | *Est Cost at Completion (E$AC):* | 100,000.00 |
| | *Total Budget:* | 1.00 |
| | *Variance (Total Budget minus- E$AC):* | 0.00 |
| | *Reason for Variance:* | Capacity may not be available |
| **Projections as of Feb 29, 2024** | *Dollars Projected for Month:* | 12,154.00 |
| | *Actual Dollars Used:* | 12,952.00 |
| | *Variance (Projected minus Actual):* | -798.00 |
| | *Reason for Variance:* | More capacity available than expected |

**Measures**

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

**Other Measures**

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

| Project Name | **(TSME24 MSMS Working Group (425197)) TSME24 MSMS Working Group (425197) (On Track)** | | |
|---|---|---|---|
| **Project Mode** | Primary: Not Available | | |
| **Project Type** | Developmental Initiatives | | |
| **Budget** | **Direct Budget**: 15,000.00 | **Indirect Budget:** 0.00 | **Total Budget:** 15,000.00 |
| **Principal Investigator/Clients** | | | |
| **Funding Agency** | | | |
| **IRB** | *HUM#:* | | *Period of Approval:* |
| **Project Team** | *Project Lead:* Kelly A Chatain | | |
| | *Budget Analyst:* Ivanna Iavorska-Em | | |
| | *Production Manager:* | | |
| | *Senior Project Advisor:* | | |
| | *Production Manager 1:* | | |
| | *Production Manager 2:* | | |
| **Proposal #** | no data | | |
| **Description** | To be determined | | |
| **SRO Project Period** | 07/2023 - 06/2024 | | |
| **Data Col Period** | | | |
| **Security Plan** | NA | | |

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

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

-------------------------------------------------------------------------------------------------------

| Report Period | Feb, 2024 (TSME24 MSMS Working Group (425197)) | Initiation |
|---|---|---|
| **Risk Level** | On Track | |
| **Monthly Updates** | Met with Dave Bolt to discuss MSMS Help Desk support as a new topic. | |
| **Special Issues** | | |

| Cost as of Mar 19, 2024 | *Total Cost to Date (direct + indirect):* | | 2,128.72 |
|---|---|---|---|
| | *Est Cost at Completion (E$AC):* | | 7,661.09 |
| | *Total Budget:* | | 15,000.00 |
| | *Variance (Total Budget minus- E$AC):* | | 7,338.91 |
| | *Reason for Variance:* | Limited meetings | |
| **Projections as of Mar 19, 2024** | *Dollars Projected for Month:* | | 1,383.09 |
| | *Actual Dollars Used:* | | 130.70 |
| | *Variance (Projected minus Actual):* | | 1,252.39 |
| | *Reason for Variance:* | Limited meetings | |

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

**Other Measures**

---

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

**Other Measures**

| Project Name | **(TSME24 QC Systems (483249)) TSME24 QC Systems (483249) (On Track)** | | |
|---|---|---|---|
| **Project Mode** | Primary: Not Available | | |
| **Project Type** | Developmental Initiatives | | |
| **Budget** | **Direct Budget**: 49,500.00 | **Indirect Budget:** 0.00 | **Total Budget:** 49,500.00 |
| **Principal** | | | |
| **Investigator/Clients** | | | |
| **Funding Agency** | | | |
| **IRB** | *HUM#:* | | *Period of Approval:* |
| **Project Team** | *Project Lead:* Sarah Elisa Broumand | | |
| | *Budget Analyst:* Ivanna Iavorska-Em | | |
| | *Production Manager:* | | |
| | *Senior Project Advisor:* | | |
| | *Production Manager 1:* | | |
| | *Production Manager 2:* | | |
| **Proposal #** | no data | | |
| **Description** | To be defined | | |
| **SRO Project Period** | 07/2023 - 06/2024 | | |
| **Data Col Period** | | | |
| **Security Plan** | NA | | |
| **Milestones** | *Pre Production Start:* | | *Pretest Start:* |
| | *Pretest End:* | | *Recruitment Start:* |
| | *Staffing Complete:* | | *GIT Start:* |
| | *SS Train Start:* | | *SS Train End:* |
| | *DC Start:* | | *DC End:* |
| **Other Project Team Members** | | | |
| **Other Project Name** | | | |
| **Sample Mgmt System** | NA | | |
| **Data Col Tool** | NA | | |
| **Hardware** | NA | | |
| **DE Software** | NA | | |
| **QC Recording Tool** | NA | | |
| **Incentive** | NA | | |
| **Administration** | NA | | |
| **Payment Type** | NA | | |
| **Payment Method** | NA | | |

-------------------------------------------------------------------------------------------------

| Report Period | Feb, 2024 (TSME24 QC Systems (483249)) | Implementing |
|---|---|---|
| **Risk Level** | On Track | |
| **Monthly Updates** | Software updates work has begun, we expect to be done with them this fiscal year. We have now 6 active QC projects going on. Brianna Sabol has officially joined our team and is helping with the setup of Evaluation and Verification projects. Her work is always being charged directly to projects. We have also began working on updating some existing reports.<br><br>Working with the QC implementation team to define requirements for the next fiscal year. | |
| **Special Issues** | | |
| **Cost as of Mar 19, 2024** | *Total Cost to Date (direct + indirect):* | 19,271.59 |
| | *Est Cost at Completion (E$AC):* | 47,884.73 |
| | *Total Budget:* | 49,500.00 |
| | *Variance (Total Budget minus- E$AC):* | 1,615.27 |
| | *Reason for Variance:* | Some tasks have been put on hold, hours will be pushed forward. |
| **Projections as of Mar 19, 2024** | *Dollars Projected for Month:* | 7,762.99 |
| | *Actual Dollars Used:* | 1,197.50 |
| | *Variance (Projected minus Actual):* | 6,565.49 |

|  | | Reason for Variance: | Some tasks have been put on hold due to other project needs, but we expect to spend the time in the upcoming months. |
|---|---|---|---|

**Measures**

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

**Other Measures**

|  | | Units at Complete | RR | HPI |
|---|---|---|---|---|
| | *Current Goal:* | | | |
| | *Goal at Completion:* | | | |
| | *Current Actual:* | | | |
| | *Estimate at Complete:* | | | |

| 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**: 20,000.00 | **Indirect Budget:** 0.00 | **Total Budget:** 20,000.00 |
| **Principal Investigator/Clients** | | | |
| **Funding Agency** | | | |
| **IRB** | *HUM#:* | | *Period of Approval:* |
| **Project Team** | *Project Lead:* Jeffrey L Smith | | |
| | *Budget Analyst:* Ivanna Iavorska-Em | | |
| | *Production Manager:* | | |
| | *Senior Project Advisor:* | | |
| | *Production Manager 1:* | | |
| | *Production Manager 2:* | | |
| **Proposal #** | no data | | |
| **Description** | Pending input from Manager | | |
| **SRO Project Period** | 07/2023 - 06/2024 | | |
| **Data Col Period** | | | |
| **Security Plan** | NA | | |

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

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

-----------------------------------------------------------------------------------------------------

| **Report Period** | Feb, 2024 (TSME24 SRO System Maintenance General (483910) ) | Implementing |
|---|---|---|
| **Risk Level** | On Track | |
| **Monthly Updates** | **Team Meetings:**<br>- ST/PB Build Team Meeting: Recap of discussion points, decisions made, and action items.<br>- DRI Files Meeting: Summary of progress on DRI files and any issues encountered or resolved.<br><br>**Project Updates:**<br>- SurveyTrak Specification Model: Review the updated model in the Google document, including any changes made or feedback received.<br>- ST (SurveyTrak) Archiver: Updated the archiving app, new developments/ maintenance activities.<br>- ST (SurveyTrak) File Manager: Updated the app, maintenance activities. | |
| **Special Issues** | None | |
| **Cost as of Mar 19, 2024** | *Total Cost to Date (direct + indirect):* | 19,736.78 |
| | *Est Cost at Completion (E$AC):* | 26,130.09 |
| | *Total Budget:* | 20,000.00 |
| | *Variance (Total Budget minus- E$AC):* | -6,130.09 |
| | *Reason for Variance:* | None |

| Projections as of Mar 19, 2024 | **Dollars Projected for Month:** | | | 1,598.33 |
| | **Actual Dollars Used:** | | | 1,892.54 |
| | **Variance (Projected minus Actual):** | | | -294.21 |
| | **Reason for Variance:** | None | | |

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

**Other Measures**

| Projections as of Mar 19, 2024 | **Dollars Projected for Month:** | | | 1,598.33 |
| --- | --- | --- | --- | --- |
| | **Actual Dollars Used:** | | | 1,892.54 |
| | **Variance (Projected minus Actual):** | | | -294.21 |
| | **Reason for Variance:** | None | | |

| | | Units at Complete | RR | HPI |
| --- | --- | --- | --- | --- |
| | **Current Goal:** | | | |

| Project Name | **(TSME24 SSL Autoscheduler interface development (42) TSME24 SSL Autoscheduler interface development (423463) (On Track)** |
|---|---|
| **Project Mode** | Primary: Not Available |
| **Project Type** | Developmental Initiatives |
| **Budget** | **Direct Budget**: 5,000.00 **Indirect Budget:** 0.00 **Total Budget:** 1.00 |
| **Principal** | |
| **Investigator/Clients** | |
| **Funding Agency** | |
| **IRB** | *HUM#:* *Period of Approval:* |
| **Project Team** | *Project Lead:* Debbie Seale |
| | *Budget Analyst:* Ivanna Iavorska-Em |
| | *Production Manager:* |
| | *Senior Project Advisor:* Grant D Benson |
| | *Production Manager 1:* Elizabeth Ohryn |
| | *Production Manager 2:* |
| **Proposal #** | no data |
| **Description** | Continued development and implementation of the SSL autoscheduler. Two primary components are outstanding: 1) Interface for SSL staff to be able to load and complete the initial scheduling run without the assistance of DMSS; 2) Implementation of a "freeze and re-run" protocol. The focus in this fiscal year will be on the freeze and re-run protocol, which allows us to optimize shift assignments. Getting the first part set up to allow SSL staff to run the scheduling process independently of DMSS will take additional programming effort. |
| **SRO Project Period** | 07/2023 - 06/2024 |
| **Data Col Period** | |
| **Security Plan** | NA |

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

| **Other Project Team Members** | Wen Chang; Hueichun Peng; Ji Qi |
|---|---|
| **Other Project Name** | |
| **Sample Mgmt System** | NA |
| **Data Col Tool** | NA |
| **Hardware** | NA |
| **DE Software** | NA |
| **QC Recording Tool** | NA |
| **Incentive** | NA |
| **Administration** | NA |
| **Payment Type** | NA |
| **Payment Method** | NA |

--------------------------------------------------------------------------------------------------

| **Report Period** | Feb, 2024 (TSME24 SSL Autoscheduler Initiation |
|---|---|
| **Risk Level** | On Track |
| **Monthly Updates** | In February, we reviewed the built R Shiny application. Testing for the new application is happening for the April 2024 schedule (posting on 3/19 for the time period 3/24-4/20/24). If this testing goes well, we will try a test the application during a scheduling period for the May 2024 schedule (scheduling begins on 4/5). There are a areas we are still working on operationalizing due to UKG constraints and are awaiting more information from UKG to move forward. |
| **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 |
|  | | Variance (Projected minus Actual): | | 0.00 |
|  | | Reason for Variance: | | |

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

**Other Measures**

|  | | Actual Dollars Used: | | 0.00 |
|  | | Variance (Projected minus Actual): | | 0.00 |
|  | | Reason for Variance: | | |

| Measures | | Units at Complete | RR | HPI |
|---|---|---|---|---|
| | Current Goal: | | | |
| | Goal at Completion: | | | |

**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**: 30,000.00 | **Indirect Budget:** 0.00 | **Total Budget:** 30,000.00 |
| **Principal Investigator/Clients** | | | |
| **Funding Agency** | | | |
| **IRB** | *HUM#:* | | *Period of Approval:* |
| **Project Team** | *Project Lead:* Lawrence Daher | | |
| | *Budget Analyst:* Ivanna Iavorska-Em | | |
| | *Production Manager:* | | |
| | *Senior Project Advisor:* | | |
| | *Production Manager 1:* | | |
| | *Production Manager 2:* | | |
| **Proposal #** | no data | | |
| **Description** | To be defined | | |
| **SRO Project Period** | 07/2023 - 06/2024 | | |
| **Data Col Period** | | | |
| **Security Plan** | NA | | |

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

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

------------------------------------------------------------------------------------------------

| Report Period | Feb, 2024 (TSME24 STrak: Migration to | Initiation |
|---|---|---|
| **Risk Level** | Some Concerns | |
| **Monthly Updates** | Database service for both production and reporting now running on the same server. Remote service for production service configured for production database. | |
| **Special Issues** | | |
| **Cost as of Mar 08, 2024** | *Total Cost to Date (direct + indirect):* | 6,610.64 |
| | *Est Cost at Completion (E$AC):* | 17,672.09 |
| | *Total Budget:* | 30,000.00 |
| | *Variance (Total Budget minus- E$AC):* | 12,327.91 |
| | *Reason for Variance:* | |
| **Projections as of Mar 08, 2024** | *Dollars Projected for Month:* | 2,765.36 |
| | *Actual Dollars Used:* | 3,348.27 |
| | *Variance (Projected minus Actual):* | -582.91 |
| | *Reason for Variance:* Rewrite of 32 bit DLL to create a 64 bit DLL. | |

**Measures**

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

**Other Measures**

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

**Other Measures**