
Survey Research Operations

Monthly Project Report

Sponsored Data Collection Projects and Development Initiative































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

Project Name	(ANES 2024) American National Election Studies - 2024 (Some Concerns)		
Project Mode	Primary: Face to Face	Secondary: Web	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 4,558,724.00	Indirect Budget: 2,466,088.00	Total Budget: 7,024,812.00
Principal	Nicholas A. Valentino (University of Michigan)		
Investigator/Clients	Shanto Iyengar (Stanford University)		
	D. Sunshine Hillygus (Duke University)		
Funding Agency	National Science Foundation (NSF)		
IRB	HUM#:		Period of Approval:
Project Team	Project Lead: Andrew L Hupp		
	Budget Analyst: William Lokers		
	Production Manager:		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	The mission of the American National Election Studies (ANES) is to inform explanations of election outcomes by providing data that support rich hypothesis testing, maximize methodological excellence, measure many variables, and promote comparisons across people, contexts, and time. The ANES serves this mission by providing researchers with a view of the political world through the eyes of ordinary citizens. SRO will be conducting the 2024 data collection.		
SRO Project Period	07/2023 - 01/2025		
Data Col Period			
Security Plan	NA		
Milestones	Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:	
Other Project Team Members	Erin McSpadden - Project Manager for the methods pilot Sharon Parker - Production Manager for the methods pilot Raphael Nishimura - Sampling (pilot and production)		
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	Blaise 5; Other (PAPI)		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	N/A		
QC Recording Tool	Camtasia		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Check, post; Cash, post (\$25 (methods pilot) for each interview)		
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)		

Report Period	Jan, 2024 (ANES 2024)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Pilot: The paper questionnaires received in Ann Arbor have been data entered (137 of 154). Two interviewers have been contacted (and verified) they had 16 questionnaires they hadn't sent. Those will be data entered once received. One additional questionnaire needs to be tracked down. Main: The main work to-date is on the sample design. There is a weekly meeting with project staff (Matt and Dave) on sampling. Raphael should have PSU's (counties) selected by the end of February so we can begin recruiting. Segments will be a bit yet. We use the first meeting of the month as a team meeting with the ANES staff. Andrew is working revisions to the timeline, and has had several meetings with a portion of SRO admin about staffing and budget projections. Those conversations have been productive and revisions have been made.		
Special Issues			

Cost as of Feb 19, 2024	Total Cost to Date (direct + indirect):			41,427.66
	Est Cost at Completion (E\$AC):			6,726,712.30
	Total Budget:			7,024,812.00
	Variance (Total Budget minus- E\$AC):			97,600.70
	Reason for Variance:			Updated costs for main project. Most TSG costs (other than Blaise programming are not projected yet). Pilot costs are below. Total Cost to Date: \$181,663.40 Estimated cost at completion: \$184,310.02 Total Budget: \$211,899.00 Variance: \$27,588.98
Projections as of Feb 19, 2024	Dollars Projected for Month:			52,662.20
	Actual Dollars Used:			18,166.22
	Variance (Projected minus Actual):			34,495.98
	Reason for Variance:			In the process of revising projections.
Measures		Units at Complete	RR	HPI
	Current Goal:			
	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 Investigator/Clients	Dr. Greg Duncan (University of California - Irvine)												
	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	<p>University of Michigan Survey Research Center (U-M SRC) is contracted to recruit and interview participants for Baby's First Years -- a longitudinal randomized control trial study.</p> <p>The study's full name, listed on sub-contract documents, is Household Income and Child Development in Early Years. The study will draw on a convenience sample of mothers and their newborns in four US metropolitan areas: New York City; Omaha/Lincoln; New Orleans; and Minneapolis. One or two hospitals, listed in this application, will be used as recruiting sites in each area. The study uses a randomized control trial design in which low-income mothers and newborns will be randomly assigned to a treatment group that receives an unconditional income enhancement -- cash payments of \$333 per month—an amount roughly comparable to a variety of income assistance policies in the U.S. and shown to be associated with meaningful improvements for poor children in prior studies—or to a control condition that receives \$20 per month. In both groups, the payments will be made for the first 40 months of the child's life. To understand the impacts of added income on children's development, researchers will assess treatment/control group differences at ages 1, 2 and 3 on measures of cognitive, language, memory, self-regulation and socio-emotional development. Recruitment is scheduled to start in April of 2018, and each follow-up interview will be conducted 12 months later -- close in time to the child's 1st, 2nd, and 3rd birthday. The feasibility of the approach has been established in a one-year pilot conducted in 2014 at the New York Presbyterian Hospital/Columbia University Medical Center.</p> <p>The Principal Investigators are Dr. Greg Duncan from University of California Irvine (UCI), Dr. Kimberly Noble from Teacher's College Columbia University (TCCU), and Katherine Magnuson from University of Wisconsin-Madison (UWM). UCI (Dr. Duncan) and TCCU (Dr. Noble) are the institutions and signatories funding the U-M SRC subcontract from various sources including the National Institute for Child Health and Human Development (NICHD) and private foundations listed in this application. The study research team also includes co-investigators Lisa Gennetian (New York University), and Hiro Yoshikawa (New York University).</p> <p>SRO will be responsible for four interactions with the selected mothers/infants:</p> <ul style="list-style-type: none"> • Baseline will occur immediately (within 24-48 hours) after birth, in the hospital; • Wave 1 will be a telephone interview with the mother when the child is 12 months old; • Wave 2 will be an in-person interview in the family's home that includes survey, developmental assessment, biomarker collection, and video recorded behavioral interaction when the child is 24 months old; • Wave 3 will be an in-person survey done while the mother and child are visiting a lab for other clinical tests when the child is 36 months old. <p>Each data collection phase/wave will be a full 12 months, with Baseline starting in April 2018:</p> <p>Recruitment/Baseline: 04/01/2018 - 03/31/2019 Wave 1: 04/01/2019 - 03/31/2020 Wave 2: 04/01/2020 - 03/31/2021 Wave 3: 04/01/2021 - 03/31/2022</p>												
SRO Project Period	10/2017 - 12/2020												
Data Col Period	04/2018 - 12/2020												
Security Plan	NA												
Milestones	<table border="0"> <tr> <td>Pre Production Start: 10/01/2017</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start: 01/01/2018</td> </tr> <tr> <td>Staffing Complete: 02/07/2018</td> <td>GIT Start: 03/19/2018</td> </tr> <tr> <td>SS Train Start: 03/20/2018</td> <td>SS Train End: 03/22/2018</td> </tr> <tr> <td>DC Start: 05/07/2018</td> <td>DC End: 06/30/2022</td> </tr> </table>			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
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	Jan, 2024 (BFY)	Implementing
Risk Level	On Track	
Monthly Updates	<p>BFY Age 5- 8:</p> <p>BFY has awarded SRO continuing work throughout Age 8 (August 2027). We are currently conducting a one-time Age5 Catch Up activity re-contacting all Rs who completed Age 4 Lab Visit but have not had their contact information updated since.</p> <p>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. Pls had sent a data collection update / newsletter to address this issue.</p> <p>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.</p> <p>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 Pls. 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 Pls. 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 Pls sample management system.</p> <p>Age 5 Staffing:</p> <p>We continue to retain the BFY Age 3 staff.</p> <p>12 iwers in total NE: 1 OS + 1 NH (Trained 9/15) MN: 2 NY: 4 OS (1 consolidated in October 2022) NOLA: 1 (1 June resignation) TLs: 1 (- 1 has gone to HRS)</p> <p>Technical system: 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.</p> <p>Finances: We continue having an underrun within the Age 5 - 8 budget.</p>	
Special Issues		
Cost as of Feb 16, 2024	Total Cost to Date (direct + indirect):	7,601,232.18
	Est Cost at Completion (E\$AC):	8,636,662.66
	Total Budget:	8,700,361.73

Variance (Total Budget minus- E\$AC):		63,699.07		
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 Feb 16, 2024	Dollars Projected for Month:	18,079.44		
Actual Dollars Used:		25,869.40		
Variance (Projected minus Actual):		-7,789.96		
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	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name	Developing a Model of Black History Month Programming in Public Libraries		
Sample Mgmt System	Web SMS		
Data Col Tool	Blaise 5		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Not used		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Jan, 2024 (BHM Library Project)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Mailing for pilot went pretty well. Even with snow closure of the SSL and MLK Day.		
Special Issues	See previous months. Despite continuing evidence that branch-level measurement is difficult and strains resources, PI maintains the plans for this design.		
Cost as of Feb 16, 2024	Total Cost to Date (direct + indirect):	63,491.51	
	Est Cost at Completion (E\$AC):	188,080.29	
	Total Budget:	197,671.00	
	Variance (Total Budget minus- E\$AC):	9,590.71	
	Reason for Variance:	We are projecting close to total budget.	
Projections as of Feb 16, 2024	Dollars Projected for Month:	13,072.68	

Actual Dollars Used:	9,959.25
Variance (Projected minus Actual):	3,113.43

Reason for Variance: Did not use programming hours -- Wen should kick in in Feb.

Measures		Units at Complete	RR	HPI
	Current Goal:	300	30	
	Goal at Completion:	150	30	
	Current Actual:			
	Estimate at Complete:			
	Variance:			

Other Measures None

Project Name	(CAMS 2023) HRS 2023 Consumption and Activity Mail Study (On Track)		
Project Mode	Primary: Mail	Total of Modes: 1	
Project Type	Sponsored Projects		
Budget	Direct Budget: 347,895.00	Indirect Budget: 125,241.00	Total Budget: 473,136.00
Principal	David Weir		
Investigator/Clients			
Funding Agency			
IRB	HUM#: HUM00079949		Period of Approval: 11/4/2022-11/3/2023
Project Team	Project Lead: Gloria J Baker		
	Budget Analyst: Cindy Tsao		
	Production Manager:		
	Senior Project Advisor: Evanthia Leissou		
	Production Manager 1: Jennifer C Arrieta		
	Production Manager 2:		
Proposal #	no data		
Description	CAMS is part of the Health and Retirement Study (HRS). The goal of CAMS is to gather additional data on household consumption and activities of daily living from participants in the HRS. In 2023, a paper questionnaire will be mailed to approximately 6,427 respondents of which 4,646 will receive the full questionnaire and 1,781 spouse/partners will receive a brief questionnaire.		
SRO Project Period	06/2023 - 05/2023		
Data Col Period	09/2023 - 04/2005		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 06/26/2023</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start: 10/04/2023</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End: 04/30/2024</div></div>		
Other Project Team Members	HRS Budget Analyst: Rick Krause Data Manager: Ed Green, Jennie Williams Programmer: Ashwin Dey Project Assistant: Melissa Luker		
Other Project Name	CAMS		
Sample Mgmt System	SurveyTrak		
Data Col Tool	SAQ		
Hardware	Paper and Pencil		
DE Software	Other (HRS study staff is responsible for)		
QC Recording Tool	N/A		
Incentive	Yes, R; Yes, Other (Spouse)		
Administration	SRO Group		
Payment Type	Check, prepaid (\$25 to main R and \$10 to spouse R)		
Payment Method	Check through STrak RPay System		

Report Period	Jan, 2024 (CAMS 2023)		Implementing
Risk Level	On Track		
Monthly Updates	During the month of January, the team worked on 1. Logging and shipping 2. Logging was carried out by normal SSL staff and Melissa. 3. 4,130 CAMS lines have been finalized of which 3,608 have completed the questionnaire. The current response rate is 57%. 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: 157 remails were sent from final mailing to Feb 20.		
Cost as of Feb 16, 2024	Total Cost to Date (direct + indirect):		401,222.48
	Est Cost at Completion (E\$AC):		367,912.55
	Total Budget:		473,136.00

Variance (Total Budget minus- E\$AC):		105,223.45		
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 (@2%) which impacts logging hours, check voids, etc.		
Projections as of Feb 16, 2024	Dollars Projected for Month:	15,237.75		
Actual Dollars Used:		8,336.20		
Variance (Projected minus Actual):		6,901.55		
Reason for Variance:		We over projected the number of hours for Survey Tech II. We projected 129 hours but only 8 were worked.		
Measures		Units at Complete	RR	HPI
	Current Goal:	3,727	58%	
	Goal at Completion:	3,470	59%	
	Current Actual:	3,526	56%	
	Estimate at Complete:	3,740	57%	
	Variance:	0	2%	
Other Measures				

Project Name	(Care & Help Study) Caregiving, Complex Family and Kinship Ties, and Alzheimer's Disease and Related Dementias (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	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Focus group phase (7/23-10/23): Margaret Hudson Cog IW phase (1/24-6/24): Margaret Hudson, TBD		
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Cash, post (\$60 focus groups; \$50 cognitive interview)		
Payment Method	Imprest Cash Fund from ISR Business Office		

Report Period	Jan, 2024 (Care & Help Study)		Implementing
Risk Level	On Track		
Monthly Updates	<p>The first 2 of 4 additional focus groups were hosted at the end of January (1/28/24 & 1/31/24). 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. The next two focus groups will be held in February (2/4 & 2/11).</p> <p>The PI and project manager are working on a revised timeline for the cognitive interview phase of the project, now expected to start in mid-March.</p>		
Special Issues			

Cost as of Feb 16, 2024	Total Cost to Date (direct + indirect):	2,897.14
	Est Cost at Completion (E\$AC):	35,842.84
	Total Budget:	42,636.00
	Variance (Total Budget minus- E\$AC):	6,793.16
	Reason for Variance:	Hosting support and nearly all project admin being handled by one person, allowing for some efficiencies.
Projections as of Feb 16, 2024	Dollars Projected for Month:	2,545.81
	Actual Dollars Used:	297.50
	Variance (Projected minus Actual):	2,248.31
	Reason for Variance:	<p>Although the original project & supplemental funding (~\$9,000) were expected to be combined for reporting, the information in MPR is not yet reflecting the additional funding. I will work with Carl R to adjust.</p> <p>The PI received booster funding to conduct additional focus groups before beginning the cognitive interview phase of the project; projections for cognitive interviewing will be updated to reflect the change in timeline (mid-to-late March start instead of late Jan/early Feb).</p>

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

Other Measures

Project Name	(CARE Military) Concussion Assessment, Research and Education (CARE) Consortium 2022 - Military (On Track)		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 1,338,017.70	Indirect Budget: 347,885.00	Total Budget: 1,685,902.70
Principal Investigator/Clients	Dr. Steven Broglio (U of M Kinesiology) Dr. Micheal McCrea /Dr. Pasquina (Medical College of Wisconsin/Uniformed Services Un) Dr. Thomas McAllister (Indiana University School of Medicine)		
Funding Agency	NCAA and DoD		
IRB	HUM#: 00202691	Period of Approval: 7/23/2021 - open	
Project Team	Project Lead: Donnalee Ann Grey-Farquharson Budget Analyst: David Kellermeyer Production Manager: Barbara Aghababian-Homburg Senior Project Advisor: Barbara Lohr Ward Production Manager 1: Hongyu Johnson Production Manager 2: Keith Liebetreu		
Proposal #	no data		
Description	<p>The project follows academy cadets post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure.</p> <p>This project has an overall SRO involvement period of 13 months, beginning March 2022, with data collection taking place over approximately 12 months starting mid-March 2022. SRO provides consultation, respondent locating activities and data collection for respondents in the uniformed services sample.</p> <p>The goal is to secure participation from approximately 3,200 unique past-CARE study participants. Participants will complete a study assessment once over the 13-month project period. SRO decentralized field interviewers locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct approximately 1,425 telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.</p> <p>The estimate total cost for the overall scope of work is \$1,426,001.00. This includes \$1,131,747.00 direct and \$294,254.00 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders).</p>		
SRO Project Period	02/2022 - 03/2023		
Data Col Period	03/2022 - 08/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Donnalee Grey-Farquharson, Barb Homburg, Hongyu Johnson, James Koopman, Keith Liebetreu, David Acquaku, Ruyi Chen, David Kellermeyer		
Other Project Name	CARE-CSI Military		
Sample Mgmt System	Other (non-SRO)		
Data Col Tool	Other (non-SRO)		
Hardware	Laptop; [UM cell] Phone		
DE Software	N/A		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	Other (Kinesiology)		
Payment Type	Check, post (\$150)		
Payment Method	Other (Kinesiology)		
=====			
Report Period	Jan, 2024 (CARE Military)		Implementing
Risk Level	On Track		
Monthly Updates	1. Project Management:		

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

2. Care SMS system: N/A

3. Questionnaire Development – N/A

4. Production:

- Production ended on 8/31/2023

5. Hiring and Training – N/A

6. DMSS:

- has been preparing reports.

7. Locating N/A

Special Issues

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

Payment Method	Check through other system (UM)			

Report Period	Jan, 2024 (CARE SALTOS MTEC)		Implementing	
Risk Level	On Track			
Monthly Updates	<div>1. Project Management: -Management team has been continuously working with Datalys and QG along side with the PI team on resolving ongoing technical issues since the production was back on track on 12/6/2023. The SRO team is strategizing how to boost production using Interviewer challenges and also closely monitoring productivity. We may also extend data collection for DCP3 a month to end May 31, 2024. -SRO continued to work with the PI team to find solutions to resolve International TOA issues. -The management team worked with the PM and TLs on reviewing protocols with the interviewers.</div> <div>2. CARE SMS system: -The SRO team was an integral part of the testing of the system fixes for the consent issue -Per SRO request, QG fixed the result code for 'Text' in order to record contact attempt effort correctly. -SRO received additional samples that were transferred from Military to ISR Civilian pool internally.</div> <div>3. Questionnaire Development -n/a</div> <div>4. Production: - Stats: as of 01/31/2024 (Total Released samples = 15046 (DCP3) Total Completed lws = 1391 (RR = 9.3%) Web = 1383 CATI = 8 - Locating Team: continued to use social media platforms to find potential respondents. As of 01/31/2024, Total current tracking=583 - Total found = 212 - Total Completed = 14</div> <div>5. DMSS: - Continued running and QCing reports daily. -resolved result code issues in report.</div> <div>6. Hiring and Training -one iwer was on a leave of absence starting Jan 2024 until further notice.</div>			
Special Issues				
Cost as of Jan 31, 2024	Total Cost to Date (direct + indirect):		1,886,260.05	
	Est Cost at Completion (E\$AC):		4,676,564.63	
	Total Budget:		4,685,914.00	
	Variance (Total Budget minus- E\$AC):		9,349.37	
	Reason for Variance:		The budget is for the next two years (ending 2026). The biggest drive of the overrun was higher interviewer hours and freight and general supply charges were lot higher than projected in January. We have been monitoring closely through each production waves. We will continue to adjust the overrun accordingly.	
Projections as of Jan 31, 2024	Dollars Projected for Month:		117,091.97	
	Actual Dollars Used:		140,803.06	
	Variance (Projected minus Actual):		-23,711.09	
	Reason for Variance:		higher actual interviewers' hours than projected in January.	
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(CCS) Community College Survey (Some Concerns)		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 560,774.00	Indirect Budget: 84,115.00	Total Budget: 644,889.00
Principal	Hana Lahr (Teachers College, Columbia University)		
Investigator/Clients	Veronica Minaya (Teachers College, Columbia University)		
	Rachel Baker (University of Pennsylvania)		
Funding Agency	Ascendium Education Group		
IRB	HUM#: 00237400		Period of Approval:
Project Team	Project Lead: Jeffrey Albrecht Jr		
	Budget Analyst: William Lokers		
	Production Manager:		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1: Rebecca Loomis		
	Production Manager 2: Steven Sonoras		
Proposal #	no data		
Description	The CCS seeks to understand factors that influence first year community college students in their program choice. We will survey a selection of students entering a community college for the first time in the fall of 2023 and then follow up with them in the second semester (Spring 2024) and their third semester (Fall 2024). The researchers will recruit 4 community colleges to participate.		
SRO Project Period	01/2023 - 03/2025		
Data Col Period	10/2023 - 11/2024		
Security Plan	NA		
Milestones	<div><div>Pre Production Start:</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start:</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End:</div></div>		
Other Project Team Members	Marsha Skoman - Qualtrics Programmer Ed Green - Data Manager Hueichun Peng - Web SMS Programmer		
Other Project Name	How Community College Students Choose Programs of Study		
Sample Mgmt System	Web SMS		
Data Col Tool	Other (Qualtrics)		
Hardware	NA		
DE Software	NA		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Other (Visa electronic gift cards)		
Payment Method	Other (VISA eGift cards)		

Report Period	Jan, 2024 (CCS)		Planning
Risk Level	Some Concerns		
Monthly Updates	<div>Wave 1 Data Management: - Ed and Jennie continued their work on data delivery. The PIs had several additional requests to add data quality variables and prepare the data files differently (e.g., providing long format in addition to wide format files). - After applying our recommendations for the sample reconciliation, the final sample for Waves 2-3 is 4,515 (35.5% response rate).</div> <div>Wave 1 Late TOA Efforts: - After Wave 1 closeout in November, we discovered the 193 respondents had not been sent TOAs, because they had not provided addresses. However, the PIs wanted to include them in the sample for Waves 2-3, so they asked us to send these respondents gift cards, if possible. SRO explored options for paying respondents without addresses and were informed that it was possible if we had a tier 2 payment designation approved by IRB. We secured approval and requested Visa egift cards, but HSIP reversed the IRB tier designation, saying that tier 2 is only meant for in-person cash payments and did not apply to any electronic payments. Upon further discussion with the Business Office, we were encouraged to trv purchasing Amazon gift codes instead. Andrew H. Donnalee.</div>		

and Maureen had successfully purchased Amazon codes on other projects, so we followed their guidance on the process, which involved creating informal (e.g., not requiring a tax ID) business accounts with Amazon, but when we tried purchasing the codes, Amazon locked each of the individual accounts created by Becky, Jeffrey, Donnalee, and Ryan N. It turns out that Amazon updated the way they manage business accounts, including not providing direct support during setup (unlike when Donnalee and others set up their accounts 5-6 years ago). Also, Ryan N informed us that U-M does not like doing business with Amazon and will not provide support in working with them. We also tried Target electronic gift cards, but they require formal business accounts to purchase bulk cards. Ryan and the Business Office did not have other ideas for paying these respondents. Having exhausted our options, the Pls decided to try to send Amazon gift codes and were able to work with their payment office to purchase the codes and send them to the respondents within 24 hours.

Wave 2 IRB:

- The Pls submitted their protocol modifications for Wave 2 to the TC IRB, which was approved and then submitted to the U-M IRB-HSBS on 2/20. The main revisions for SRO were to send an invitation card with \$5 cash prepayment, increase the TOA from \$30 to \$40, and use a shortened consent form.

Wave 2 Survey:

- Marsha continued programming the Wave 2 English and Spanish surveys.
- Ed created test lines, and the team started testing the survey.

Wave 2 TOA Preparations:

- Given the challenges we faced with the HSIP Visa egift cards in Wave 1, the Pls insisted that they wanted to provide at least three TOA options for respondents to choose from in Waves 2-3, including Amazon gift codes, on account of the speed with which they can be processed. So, the Pls are considering sending those TOAs themselves, and SRO would send new Visa egift cards and cash. Note: Visa egift card reloads are also not an option, because HSIP/Dash does not send a notification to respondents when funds are added to their cards.
- Hueichun is setting up Web SMS to export the auto-formatted TOA request files, so that Becky can efficiently send them to the Business Office for processing. This should save a good deal of effort and make providing multiple TOA options more feasible.

Web SMS

- Hueichun continued programming Web SMS, including working with Ed and Jennie to set up the preload variables.

Special Issues

Wave 2 scope increase:

- Bill and Jeffrey are working on the scope increases proposed for Wave 2, which is planned to launch production on March 11 with the invitation card mailing.

IRB

- Also, we just submitted the Wave 2 protocol revisions to the U-M IRB-HSBS. We expect a fast turnaround, because this is a ceded application, the revisions have precedent in SRO, and Jeffrey had given Mary Donnelley a heads up and followed her guidance.

Cost as of Jan 31, 2024	Total Cost to Date (direct + indirect):	325,128.28
	Est Cost at Completion (E\$AC):	729,707.41
	Total Budget:	644,889.00
	Variance (Total Budget minus- E\$AC):	-84,818.41
	Reason for Variance:	<p>In January, we continued exploring options for several scope changes. The Pls requested a scope increase for Wave 2 to add a invitation card mailing with \$5 cash prepayment and increase Wave 2 TOAs to \$40. The Teachers College IRB has approved these modifications to the protocol, and Bill is preparing the cost estimate, which will cover the current overrun, including funds to make up for the Wave 1 overrun and for Jeffrey to join the Pls at Lorain County Community College to shore up participation. The Pls have agreed to add ~\$85,000 to the SRO sub award for this work.</p> <p>First, the Pls are skeptical about the effects of reminder calling on survey completion among the CCS respondents, who are very young and not accustomed to answering phone calls. Given their doubts, the Pls decided to reduce calling effort in Wave 2 and remove calling in Wave 3. We will conduct an experiment to test their effects in Wave 2, and if they prove effective and funds are sufficient, then we will possibly add calling back to the Wave 3 scope.</p> <p>Second, we are adding an invitation card mailing with \$5 prepayment to the Wave 2 scope. The Pls originally wanted to send a "we're sorry the TOA was so difficult in Wave 1" holiday card with a \$5 make-up TOA. However, after some persuading, they decided to give it a more positive spin by framing it as a Wave 2 prepayment instead. Becky and Steven are working with PrintCopyMail to arrange the mailing.</p> <p>Third, we are increasing the Wave 2 TOA from \$30 to \$40. The Pls have some extra funds and believe that the additional \$10 will improve Wave 2 response rates.</p>

Projections as of Jan 31, 2024	Dollars Projected for Month:	58,969.58
	Actual Dollars Used:	23,818.04
	Variance (Projected minus Actual):	35,151.54
	Reason for Variance:	Wave 2 production was originally planned to begin in January, but after experiences with working around the colleges' schedules in Wave 1, we decided to push Wave 2 production launch back to March 11. However, Jeffrey forgot to move the respondent payment funds from January to March, so that accounts for \$28,530 of the January underrun. There was also \$4,585 over-projected in indirect costs.

Measures		Units at Complete	RR	HPI
	<i>Current Goal:</i>			
	<i>Goal at Completion:</i>		39%	
	<i>Current Actual:</i>	4,515	35.5%	
	<i>Estimate at Complete:</i>			
	<i>Variance:</i>			

Other Measures

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

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

Report Period	Jan, 2024 (EDC-Endline)		Closing	
Risk Level	On Track			
Monthly Updates	Only activity is a credit.			
Special Issues				
Cost as of Feb 16, 2024	Total Cost to Date (direct + indirect):		1,202,879.22	
	Est Cost at Completion (E\$AC):		1,202,879.22	
	Total Budget:		3,097,511.00	
	Variance (Total Budget minus- E\$AC):		1,894,631.78	
	Reason for Variance:		None	
Projections as of Feb 16, 2024	Dollars Projected for Month:		0.00	
	Actual Dollars Used:		-367.63	
	Variance (Projected minus Actual):		367.63	
	Reason for Variance:		See previous months.	
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(HCAP 2022) Healthy Cognitive Aging Project, 2022 (On Track)		
Project Mode	Primary: Face to Face	Secondary: Telephone	
Project Type	Sponsored Projects		
Budget	Direct Budget: 3,519,976.47	Indirect Budget: 1,267,191.53	Total Budget: 4,787,168.00
Principal	Kenneth Langa (SRC)		
Investigator/Clients	David Weir (SRC)		
Funding Agency			
IRB	HUM#: HUM00099822	Period of Approval:	
Project Team	Project Lead: Maureen Joan O'Brien		
	Budget Analyst: Richard Warren Krause		
	Production Manager: Margaret Lavanger		
	Senior Project Advisor: Evanthia Leissou		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>This project will involve the completion of a face-to-face CAPI interview, designed to provide a dementia assessment of HRS respondents. A sample of 5000 respondents (one per household) who are 65 years of age or older will be selected for this effort. The questionnaire is a series of 15 cognitive tests and will be administered to respondents after the HRS 2022 interview has been completed. The sample will not be clustered geographically; it will be selected randomly. It is expected that the field team will carry out well-planned regional trips in order to complete the 3,530 in-person interviews. An informant interview will also be completed for each of the respondents interviewed.</p> <p>The respondent questionnaire length is expected to be 60 minutes. The informant questionnaire is expected to be 20 minutes and can be administered in-person after the R interview, or by telephone/mail if FTF is not available.</p>		
SRO Project Period	01/2022 - 12/2023		
Data Col Period	07/2022 - 11/2023		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 04/01/2022</div><div>Pretest End: 05/21/2020</div><div>Staffing Complete:</div><div>SS Train Start: 07/13/2022</div><div>DC Start: 07/18/2022</div></div> <div><div>Pretest Start: 05/01/2020</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End: 07/15/2022</div><div>DC End: 11/30/2023</div></div>		
Other Project Team Members	PDMG: Tony Romanowski, Lisa VanHavermaet, Megan Hromco, Kristen Cross. TSG: Jeff Smith, Brad Goodwin, Valyn Dall, Peter Sparks, Ashwin Dey, Deb Wilson		
Other Project Name	Harmonized Cognitive Assessment Protocol		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone		
DE Software	Blaise 4.8 BIA		
QC Recording Tool	NA		
Incentive	Yes, R; Yes, INF		
Administration	NA		
Payment Type	Check, prepaid (50); Cash, post (25)		
Payment Method	Check through STrak RPay System		

Report Period	Jan, 2024 (HCAP 2022)		Implementing
Risk Level	On Track		
Monthly Updates	<p>The final HCAP iw was completed on 12/9. We extended into December in order to attempt to reach Informants for the Rs who were completed up to 11/30.</p> <p>Some activity continued into January to accommodate interviewer materials arriving back to Ann Arbor, organizing materials that are being kept for next wave, disposing of materials that we will not need for future waves, and reconciling a few check requests that have come in. Some other minor costs hit the account in January.</p>		
Special Issues	Production training and production launch were postponed to Summer, 2022 due Covid19 pandemic. We are projecting an overrun due to the inflation over 2-year delay, continued low-level management over this 2 years, increased sample size between 2020 and 2022, and a budget cap in 2020.		

Cost as of Feb 16, 2024	Total Cost to Date (direct + indirect):			4,820,908.85
	Est Cost at Completion (E\$AC):			4,803,295.40
	Total Budget:			4,787,168.00
	Variance (Total Budget minus- E\$AC):			-16,127.40
	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 Feb 16, 2024	Dollars Projected for Month:			785.94
	Actual Dollars Used:			16,461.60
	Variance (Projected minus Actual):			-15,675.66
	Reason for Variance:			Staff hours and travel hours were higher than projected due to last minute trips to boost production.
Measures		Units at Complete	RR	HPI
	Current Goal:	5641	68	4.8
	Goal at Completion:	5641	68	4.8
	Current Actual:	5841	70.8	4.87
	Estimate at Complete:	5841	70.8	4.87
	Variance:	+200	+2.4%	+0.07
Other Measures	Iw counts include R + Inf. Final RR for Rs is expected to be 70% and final Inf RR to be 64% (67% overall).			

Project Name	(Health and Well Being in SE MI) Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan) (Attention!)		
Project Mode	Primary: Face to Face Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 2,409,055.00	Indirect Budget: 1,349,072.00	Total Budget: 3,758,127.00
Principal	Kristine Ajrouch (Life Course Development Program, SRC)		
Investigator/Clients	Toni Antonucchi (Life Course Development Program, SRC)		
	Laura Zahodne (Life Course Development Program, SRC)		
Funding Agency			
IRB	HUM#: HUM00146040	Period of Approval: 4/9/2020	
Project Team	Project Lead: Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Taghreid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 600 interviews with recently identified Arab Americans aged 65 or older residing in Southeast Michigan and 330 interviews with Social Relations sample members aged 65 or older. The Arab American sample will be selected based on an in-person household screening. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements. Social Relations respondents will only complete the cognitive interview. An informant interview will also be conducted for all sample members. Interviews will be conducted in English or Arabic.		
SRO Project Period	05/2019 - 03/2023		
Data Col Period	05/2023 - 03/2024		
Security Plan	No		
Milestones	<div><div>Pre Production Start: 12/01/2022</div><div>Pretest End:</div><div>Staffing Complete: 04/10/2023</div><div>SS Train Start: 05/18/2023</div><div>DC Start: 05/30/2023</div></div> <div><div>Pretest Start:</div><div>Recruitment Start: 02/01/2023</div><div>GIT Start: 05/16/2023</div><div>SS Train End: 05/25/2023</div><div>DC End: 09/30/2023</div></div>		
Other Project Team Members	Taghreid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall		
Other Project Name	Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan)		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	DRI-CARI; Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	SRO Group		
Payment Type	Cash, prepaid (\$75 respondent, \$25 informant); Other (\$2 screener incentive)		
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)		

Report Period	Jan, 2024 (Health and Well Being in SE MI)	Implementing
Risk Level	Attention!	
Monthly Updates	<p>The D-AMP project continues to limp along with low production and high HPI/HPS. The new sample design (super-high MENA) released on Dec 7 shows improved eligibility (42% versus previous releases at 10%) however this will not make up for the high interviewing costs to date.</p> <p>On January 4, we provided the PIs with updated production charts showing the deficits in production and high spending compared to % production completed. The PIs acknowledged the numbers. Also during the Jan 4 2024 meeting we discussed how best to use the remaining money on the project. We also reviewed suggestions from SDG. The PIs are resistant to considering scope reductions. They have stepped up community outreach efforts, and will try using influencers (hired by the PIs) to appeal to resistant households selected for D-AMP.</p> <p>On Jan 11, SRO provided the research team with an estimate of monthly production and spending, which would result in about 240-290 completed main (new sample) interviews and informants (with a 70% RR on informants)</p>	

using the existing budget. The LCD team shared that they were going to meet with the D-AMP project officer on Jan 23. (Unfortunately we did not have enough advance notice to prepare ballpark projections for that meeting). Post-meeting, the LCD team said that the project officer would like to know what it would take to complete the project as designed, and SRO began working on ballpark budgets (delivered in early February). The PIs did not want to incorporate any suggested scope modifications in the budgets. 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.

In mid-January, the research team approved moving forward with preparation for release of panel cases. The team also agreed to allow SRO to develop "Welcome Packets" for newly screened in sample households. SRO proposed the idea of allowing interviewers to offer a telephone interview first for a small sample of households. The IRB would not approve adding telephone as a mode of interviewing without a full-scale revision of all study materials, revising all study consent forms and re-printing and rekitting consent forms for 1000+ cases. The IRB did agree to allow SRO to pilot a small number of cases using a special consent forms. SRO began working on preparing a special set of pilot materials for submission to the IRB.

The study continues to experience interviewer attrition, including from the small group of on-staff interviewers training at the end of November/beginning December. The research team approved moving forward with a new recruitment effort to bring on screening interviewers.

The study still faces the issue of a community that is resistant to screening and resistant to participating in research. We still do not have a full complement of approved Arabic materials. We also continued to press the PIs to update and maintain the website for the study. Arabic translations were added to the study website in January.

Special Issues

We have been keeping the dire financial situation of the study in front of the PIs as frequently as possible, including revising the monthly activity report to emphasize the financial and production situation. (The financial situation was reviewed in September, November, and early January.)

NOTE: We are projecting that all of the project budget will be used for data collection, especially given the excessively high HPI. We are not projecting an overrun -- the assumption is that the work scope will be reduced in order to avoid overruns.

Cost as of Feb 16, 2024	Total Cost to Date (direct + indirect):		2,647,750.28	
	Est Cost at Completion (E\$AC):		3,756,051.85	
	Total Budget:		3,758,127.00	
	Variance (Total Budget minus- E\$AC):		2,075.15	
	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 Feb 16, 2024	Dollars Projected for Month:		174,264.70	
	Actual Dollars Used:		131,246.86	
	Variance (Projected minus Actual):		43,017.84	
	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. We will continue to reduce the expected monthly cost of data collection to match the lower effort and yield as well as extended data collection period.	
Measures		Units at Complete	RR	HPI
	Current Goal:	930 main, 930 inf	60% scr, 74% main	10.38 w/screening
	Goal at Completion:			
	Current Actual:	98 main, 70 inf	34% scr, 38.3% main	41,7 HPI w/screening
	Estimate at Complete:			
	Variance:			

Other Measures

RR shown above are for the released sample.
Budgeted at 140 minutes, the D-AMP average interview length is 161 minutes.
Saliva participation rate is roughly 84% compared to 80% budgeted.

Project Name	(HRS 2022 Panel & Baselines) Health and Retirement Study 2022 Main Interviews (On Track)		
Project Mode	Primary: Mixed Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	Direct Budget: 13,982,815.00	Indirect Budget: 5,033,815.00	Total Budget: 19,016,630.00
Principal Investigator/Clients	David Weir (ISR-SRC)		
Funding Agency			
IRB	HUM#: HUM000611128	Period of Approval: 6/7/2023-6/6/2024	
Project Team	Project Lead: Evanthia Leissou Budget Analyst: Richard Warren Krause Production Manager: Andrea Sims Senior Project Advisor: Nicole G Kirgis Production Manager 1: Jennifer C Arrieta Production Manager 2: Theresa Camelo		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.		
SRO Project Period	01/2021 - 12/2023		
Data Col Period	03/2022 - 08/2023		
Security Plan	NA		
Milestones	<div> Pre Production Start: 01/01/2021 Pretest End: 11/23/2021 Staffing Complete: 01/15/2022 SS Train Start: 02/23/2022 DC Start: 03/07/2022 </div> <div> Pretest Start: 11/01/2021 Recruitment Start: 08/01/2021 GIT Start: 02/21/2021 SS Train End: 03/03/2022 DC End: 05/10/2025 </div>		
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 lws		
Sample Mgmt System	SurveyTrak; MSMS		
Data Col Tool	Blaise 5; SAQ		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Blaise 5 Coding Application); External vendor (DataForce)		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	NA		
Payment Type	Check, prepaid (\$80 (Panel)); Check, post (\$50 (WBD)); Cash, post (\$20 (SAQ), \$100 (Baselines))		
Payment Method	Check through STrak RPay System; Check through other system (Rpay system set up for MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (Rpay system set up for MSMS); Imprest Cash Fund from ISR Business Office (Rpay system set up for MSMS)		
=====			
Report Period	Jan, 2024 (HRS 2022 Panel & Baselines)		Implementing
Risk Level	On Track		
Monthly Updates	1. The project team has been working on baseline production monitoring, cost monitoring, sample management, logging, weekly mailings (SSA and SAQ), payment and letter request processing, and implementing the baseline		

end game protocol.

3. Baseline production has 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 that has also improved. Field managers continue to work with interviewers who are not meeting expectations.

5. DMSS developed reports to better monitor high priority, end game, and screening effort rates at a weekly and biweekly level by PSU.

6. Different scenarios for goals, extending data collection beyond June 2024, and associated costs were reviewed with Dr. Weir. Additional changes to projections made based on discussions.

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

8. Based on the propensity model run in September, there are 4,920 baseline cases that have ever been flagged priority of which 798 (16%) have completed an interview. Newly generated baselines from screening continue to be flagged on a weekly basis.

9. 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. 4,744 baseline respondents have been mailed the end game letter of which 384 (8%) have completed the interview and 36 (1%) have scheduled an appointment. Weekly, new cases are flagged for end game once they meet the resistance or 120+ days since screened criteria.

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

Special Issues	<ul style="list-style-type: none"> - Did not meet the Panel response rate goal of 74% even with the additional five months of field time and responsive design strategies due to interviewer count and balancing effort with new cohort screening/baseline iws. - Slow progress with baseline interviewing. - Multiple Blaise issues that have impacted STRak and MSMS throughout data collection. - 2022 New Cohort data collection projected to end in May 2025 in order to meet goal. - Competing project team demands with HRS 2022 in data collection at the same time as 2023 mail surveys and HRS 2024 preproduction. - High field staff attrition rate. Burden on staff with additional recruitment and training efforts while managing production. 			
Cost as of Feb 16, 2024	Total Cost to Date (direct + indirect):	18,087,586.76		
	Est Cost at Completion (E\$AC):	18,084,077.96		
	Total Budget:	19,016,630.00		
	Variance (Total Budget minus- E\$AC):	932,552.04		
	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 Feb 16, 2024	Dollars Projected for Month:	761.60		
	Actual Dollars Used:	24,026.05		
	Variance (Projected minus Actual):	-23,264.45		
	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:	16,256	50%	11.4
	Goal at Completion:	23,468	46%	7.9
	Current Actual:	16,269	50%	11.4
	Estimate at Complete:	22,186	44%	9.7
	Variance:	1,282	2%	1.8
Other Measures				
Panel: Expected RR: 68% (original goal 74%), Final RR: 68% (Panel end date 9/2/23) 2022 Baselines generated from screener: Goal RR: 26% (6,450 iws) Current RR: 26.6% (2,801 completed) from 10,633 baselines spawned from screener as of 2/19/24. 2019 EGenX baselines: Goal RR: 70% , Current RR: 74.3%				

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	<div><div>Pre Production Start: 05/15/2023</div><div>Pretest End: 02/18/2024</div><div>Staffing Complete: 03/15/2024</div><div>SS Train Start: 04/23/2024</div><div>DC Start: 05/06/2024</div></div> <div><div>Pretest Start: 01/29/2024</div><div>Recruitment Start: 12/19/2023</div><div>GIT Start: 04/22/2024</div><div>SS Train End: 04/29/2024</div><div>DC End: 05/31/2025</div></div>		
Other Project Team Members	<p>Alex Warju (Production Manager), Gary Hein (Project Manager), Erin McSpadden (Project Manager), Daniah Buageila (Project Manager), Janet McBride (Project Assistant), Paul Burton (Stats/Sampling), Vanessa Clarke (Project Assistant), Jeannie Baker (Project Manager), Melissa Luker (Project Assistant), Anthony Romanowski (Project Manager), Megan Hromco (Project Assistant), Austin De Spirito (Project Assistant), Cindy Huang (Budget Analyst), Dominic Bonanni (Project Assistant)</p> <p>Tech Team: Karl Dinkelmann, Jeff Smith, Jim Rodgers, Laura Yoder, Marsha Skoman, Ashwin Dey, Pam Swanson, David Bolt, Deb Wilson, Jennie Williams, Rose Zybdel, Stephanie Windisch, Holly Ackerman, Shane Empie, Kelly Chatain, Brianna Sabol, Kelly Lieske</p>		
Other Project Name	HRS 2024 Panel		
Sample Mgmt System	SurveyTrak; MSMS		
Data Col Tool	Blaise 5; SAQ		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Blaise 5 Coding Application); External vendor (DataForce)		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	NA		
Payment Type	Check, prepaid (\$100 (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	Jan, 2024 (HRS 2024)		Planning
Risk Level	Some Concerns		
Monthly Updates	<p>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 training material and bulk mailing preparations, pretest training of 13 interviewers (1/27-1/28), and production new hire recruitment.</p> <p>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 January with CBS to try to address getting this feature and other issues stemming from the addition of this feature</p>		

to work in the DIM/MSMS offline world. Blaise 5.14 is working fine in SurveyTrak.

Pretest training: Ypsi Marriott 1/27-1/28
Pretest Data Collection: 1/29-2/17
Production training: Southfield Westin 4/22-4/29 (2 days GIT, 6 days Study Specific)
TEL, FTF, FTFe Production start (SurveyTrak): 5/6
Web Production Start (MSMS): 6/3

Special Issues	-Resource (Field Staff) concerns for HRS 2024 preproduction and production while HRS 2022 data collection. The plan is to recruit @80 interviewers for start of 2024 production and potentially another HRS 2024 training in the fall. -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 Feb 16, 2024	Total Cost to Date (direct + indirect):	484,328.06		
	Est Cost at Completion (E\$AC):	1,085,062.34		
	Total Budget:	821,421.00		
	Variance (Total Budget minus- E\$AC):	-263,641.34		
	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 sine last month is due to additiopnal supply orders for 2024 data collection and the deposit for Southfield Westin for the April Training.		
Projections as of Feb 16, 2024	Dollars Projected for Month:	262,923.41		
	Actual Dollars Used:	195,072.11		
	Variance (Projected minus Actual):	67,851.30		
	Reason for Variance:	Variance primarily due to staff hours and supplies that did not hit in January. 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 End: Staffing Complete: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: 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	Jan, 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. -Qize (HRS grad student) developed am 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. -These updated numbers have been turned over to Carolyn in the SSL to provide an estimate for both time and cost. -Once a new budget has been determined, it will be submitted to HRS who will then decide whether or not to move forward with this project. The project funding is currently scheduled to conclude at the end of February. -Due to the significant scope change, Amanda has suggested that the team take a look at the more relevant questions in order to pare down the number.		

Special Issues

- PI with the most coding experience/knowledge left the organization shortly after start of project

-SRO's staff member with the most HRS coding experience/knowledge informed project team in mid-January that he will be retiring the first week of February allowing for a very short transition of knowledge to the newly assigned coding lead.

-Preliminary NIOCCS results are disappointing which may result in more SRO coding than originally anticipated. Will assess impact to budget and timeline once have final counts from HRS staff and HRS approves the cost estimate.

-Consistent delays in the coding data delivery to SRO makes it difficult to really plan for coding resources.

-Funding for the supplement ends at the end of February 2024.

Cost as of Feb 16, 2024	Total Cost to Date (direct + indirect):	25,899.19
	Est Cost at Completion (E\$AC):	86,421.41
	Total Budget:	92,157.06
	Variance (Total Budget minus- E\$AC):	5,735.65
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 Feb 16, 2024	Dollars Projected for Month:	11,274.06
	Actual Dollars Used:	1,515.94
	Variance (Projected minus Actual):	9,758.12
	Reason for Variance:	Due to initial project delay and further delay with HRS (ISR) staff, coding hours have not been utilized. Coding now estimated to begin in February 2024 so unused hours for project management, system set up, and coding will be pushed forward.

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

Other Measures

Project Name	(HRS2022-Screening) HRS 2022 - Screening (Some Concerns)		
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 21,264,149.00	Indirect Budget: 7,655,093.00	Total Budget: 28,919,242.00
Principal Investigator/Clients	David Weir (SRC) Helen Levy (SRC) Ken Langa (SRC)		
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Evanthia Leissou Budget Analyst: Richard Warren Krause Production Manager: Senior Project Advisor: Nicole G Kirgis Production Manager 1: Andrew L Hupp Production Manager 2: Theresa Camelo		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample.		
SRO Project Period	02/2021 - 08/2024		
Data Col Period	03/2022 - 06/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: 04/19/2022 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	SurveyTrak; MSMS; Other ((Blaise) Case Management App (CMA))		
Data Col Tool	Blaise 5		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Blaise 5 web instrument); N/A		
QC Recording Tool	Camtasia; N/A		
Incentive	Yes, R; Yes, INF		
Administration	SRO Group		
Payment Type	Check, post; Cash, prepaid (\$2); Cash, post		
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office		
=====			
Report Period	Jan, 2024 (HRS2022-Screening)		Implementing
Risk Level	Some Concerns		
Monthly Updates	<p>Screening is going at a steady pace as the focus has been on baseline production. Goals have been updated to reflect the priority of interviewers work in the field (baseline high priority, baseline endgame, screening endgame, and screening) and the effort (hours) the interviewers are actually providing. Release 6 has gone through the web protocol is either in the field, or waiting to go as we have trips planned to unstaffed areas (currently 17 PSUs)</p> <p>We have released 7,495 cases to the endgame protocol. 588 cases (7.8%) of cases have completed a screener. 63 cases (10.7%) completed via the web, and 498 (89.3%) of cases completed in-person. Another 2,051 cases are eligible for endgame and will be released this week.</p> <p>There were four address sorting trainings. Address sorting has begun on the first replicate of ~150 segments.</p>		
Special Issues			

Cost as of Feb 21, 2024	Total Cost to Date (direct + indirect):	20,463,656.96
	Est Cost at Completion (E\$AC):	36,528,654.91
	Total Budget:	28,919,242.00
	Variance (Total Budget minus- E\$AC):	-7,609,412.91
	Reason for Variance:	Projections have been entered through March 2025 (projection of when we would meet the baseline production goal).

Projections as of Feb 21, 2024	Dollars Projected for Month:	1,325,432.34
	Actual Dollars Used:	1,376,985.08
	Variance (Projected minus Actual):	-51,552.74
	Reason for Variance:	Recharges accounted for ~\$7K of the variance. Travel was over by \$73,413. \$33,586 of this was from October training travel that was placed on p-cards and reconciled 3 months late. The unused training projections had dropped because we thought all the expenses would have been charged by now. Also, we were about \$40K over on travel on Main Data Collection, which is attributed to the iwers working more hours than expected.

Measures		Units at Complete	RR	HPI
	Current Goal:	3,600/1,500 HHs	73%	3.0
	Goal at Completion:			
	Current Actual:	3,727/3,244	41.5%	2.81
	Estimate at Complete:			
	Variance:			

Other Measures

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

Risk Level	On Track			
Monthly Updates	<p>The LAST version of ALL data models was finally released.</p> <p>Last month the team was mostly focused on close out activities. This involves some data recovery and working on merges. There are some funds showing that are left but the budget will be balanced and those hours will be re-distributed to help with close out related activities. At this moment the amount of data recovery is unknown but appears to be manageable(minimal compared to other SRO projects).</p>			
Special Issues	Wave 3 funding balance ended at -\$18,833.61 direct and indirect costs (-\$12,072.53 Direct))			
Cost as of Feb 16, 2024	Total Cost to Date (direct + indirect):			89,392.33
	Est Cost at Completion (E\$AC):			129,266.74
	Total Budget:			134,259.00
	Variance (Total Budget minus- E\$AC):			4,992.26
	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 Feb 16, 2024	Dollars Projected for Month:			12,534.81
	Actual Dollars Used:			9,074.42
	Variance (Projected minus Actual):			3,460.39
	Reason for Variance:	Due to staffing constraints some of the allocated hours could not be used, they will be re-allocated moving forward.		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(LHMS 2023 Fall) Life History Mail Study Fall 2023 (On Track)		
Project Mode	Primary: Mail	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 371,587.00	Indirect Budget: 133,772.00	Total Budget: 505,359.00
Principal	David Weir (SRC)		
Investigator/Clients	Jaqui Smith (SRC)		
Funding Agency	NIH		
IRB	HUM#: HUM00106904		Period of Approval: 9/29/2023-9/28/2024
Project Team	Project Lead: Gary Hein Budget Analyst: Cindy Tsao Production Manager: Ruth B Philippou Senior Project Advisor: Evanthia Leissou Production Manager 1: Production Manager 2: Ruth B Philippou		
Proposal #	no data		
Description	<p>The HRS Life History Mail Survey (LHMS) is part of the Health and Retirement Study. The goal of LHMS is to collect retrospective life histories of HRS participants to address multidisciplinary need for information about events, residential location, and education over the entire life course. Information like this allows researchers to understand how individuals' pasts shape their health and economic situations today.</p> <p>A paper questionnaire will be mailed to a sample of approximately 4,601 HRS Respondents. From this sample, approximately 2,485 completed surveys are expected (54% response rate). For the reminder protocol, 272 respondents have been designated to receive a reminder by postcard. The remaining 4,329 respondents will receive reminders by phone to complete the questionnaire. When a respondent is reached by phone, SRO will attempt to complete the 60-minute interview by telephone. Thank you postcards will be mailed to respondents who return a completed questionnaire.</p>		
SRO Project Period	09/2023 - 04/2024		
Data Col Period	10/2023 - 02/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 09/01/2023 Pretest End: Staffing Complete: SS Train Start: DC Start: 10/05/2023 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 02/29/2024 </div> </div>		
Other Project Team Members	Gary Hein: Project Lead Cindy Tsao: Budget Analyst Ruth Philippou: Production Manager Vanessa Clarke: Project Assistant Carolyn Viera Martinez: Coding Lead		
Other Project Name	LHMS Fall		
Sample Mgmt System	SMS		
Data Col Tool	SAQ; Other (Blaise SMS)		
Hardware	Desktop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Check, prepaid (\$25)		
Payment Method	Check through STRak RPay System		
=====			
Report Period	Jan, 2024 (LHMS 2023 Fall)		Implementing
Risk Level	On Track		
Monthly Updates	Fall LHMS activities and notable events: 1- SAQs received and logged 2- Progress reports prepared and delivered to PIs 3- SAQs shipped to DataForce for scanning 4- Scanned SAQs and Fall data deliveries delivered to PIs		

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

Special Issues	- SSL resource availability for reminder calling and logging activities. - Budgeted goal of 54% seems high considering the sample consists of past wave non-responders and a few new spouses. The Spring LHMS, which also consisted of past wave non-responders, current response rate (as of 2/16/2024) is 18%. -Reminder calling will be extended through the end of February	
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Cost as of Feb 14, 2024	Total Cost to Date (direct + indirect):	281,068.98
	Est Cost at Completion (E\$AC):	315,931.28
	Total Budget:	505,359.00
	Variance (Total Budget minus- E\$AC):	189,427.72
	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 Feb 14, 2024	Dollars Projected for Month:	34,694.83
	Actual Dollars Used:	29,047.23
	Variance (Projected minus Actual):	5,647.60
	Reason for Variance:	SSL hours did not meet projections.

Measures		Units at Complete	RR	HPI
	Current Goal:			N/A
	Goal at Completion:	2063	54%	N/A
	Current Actual:	575	15%	N/A
	Estimate at Complete:	625	16%	N/A
	Variance:	1438	38%	N/A

Other Measures N/A

Project Name	(LHMS 2023 Spring) Life History Mail Study Spring 2023 (On Track)		
Project Mode	Primary: Mail	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 293,540.00	Indirect Budget: 164,382.00	Total Budget: 457,922.00
Principal	David Weir (SRC)		
Investigator/Clients	Jaqui Smith (SRC)		
Funding Agency	NIH		
IRB	HUM#: HUM00229404		Period of Approval: 11/4/2022-11/3/2023
Project Team	Project Lead: Gary Hein		
	Budget Analyst: Cindy Tsao		
	Production Manager: William Keating		
	Senior Project Advisor: Evanthia Leissou		
	Production Manager 1:		
	Production Manager 2: William Keating		
Proposal #	no data		
Description	<p>The HRS Life History Mail Survey (LHMS) is part of the Health and Retirement Study. The goal of LHMS is to collect retrospective life histories of HRS participants to address multidisciplinary need for information about events, residential location, and education over the entire life course. Information like this allows researchers to understand how individuals' pasts shape their health and economic situations today.</p> <p>A paper questionnaire will be mailed to a sample of approximately 2,288 HRS Respondents. From this sample, approximately 1,242 completed surveys are expected (54% response rate). For the reminder protocol, 495 respondents have been designated to receive a reminder by postcard. The remaining 1,793 respondents will receive reminders by phone to complete the questionnaire. When a respondent is reached by phone, SRO will attempt to complete the 60-minute interview by telephone. Thank you postcards will be mailed to respondents who return a completed questionnaire.</p>		
SRO Project Period	04/2023 - 12/2023		
Data Col Period	06/2023 - 09/2023		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 04/01/2023</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start: 07/11/2023</div><div>DC Start: 06/20/2023</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End: 07/11/2023</div><div>DC End: 09/26/2023</div></div>		
Other Project Team Members	Gary Hein: Project Lead Cindy Tsao: Budget Analyst Vanessa Clarke: Project Assistant Carolyn Viera Martinez: Coding Lead		
Other Project Name	LHMS Spring		
Sample Mgmt System	SMS		
Data Col Tool	SAQ; Other (Blaise SMS)		
Hardware	Desktop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Check, prepaid (\$25)		
Payment Method	Check through STRak RPay System		

Report Period	Jan, 2024 (LHMS 2023 Spring)	Initiation
Risk Level	On Track	
Monthly Updates	January Activities and Notable Events: 1 -Logged returned SAQs 2- Weekly progress reports created and delivered to project stakeholders 3- Data delivery of completed scanned SAQs to Pls 4- Completed SAQs mailed to Dataforce for scanning 5- Created of data crosswalks for data deliveries	

Special Issues

Cost as of Feb 08, 2024	Total Cost to Date (direct + indirect):	251,472.91
	Est Cost at Completion (E\$AC):	230,487.89
	Total Budget:	457,922.00
	Variance (Total Budget minus- E\$AC):	227,434.11

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 Feb 08, 2024	Dollars Projected for Month:	6,315.83
	Actual Dollars Used:	6,457.98
	Variance (Projected minus Actual):	-142.15

Reason for Variance:

Minute differences in projections vs expenses

Measures		Units at Complete	RR	HPI
	Current Goal:	1053	54%	N/A
	Goal at Completion:	1053	54%	N/A
	Current Actual:	355	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 (Some Concerns)		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 379,112.00	Indirect Budget: 98,569.00	Total Budget: 477,681.00
Principal Investigator/Clients	Nancy Fleischer (U-M School of Public Health (SPH))		
Funding Agency	MDHHS - Releases 1 - 8		
IRB	HUM#: HUM00234617	Period of Approval: 6/15/2023-6/14/2028	
Project Team	Project Lead: Timothy Prand Budget Analyst: William Lokers Production Manager: Lisa J Carn Senior Project Advisor: Nicole G Kirgis Production Manager 1: Narine Verdiyan Production Manager 2:		
Proposal #	no data		
Description	<p>MI CReSS is a partnership between the University of Michigan School of Public Health (SPH) and the Michigan Department of Health and Human Services. It is a public health surveillance study to learn about Michiganders' experiences with COVID-19 using a representative sample of confirmed cases within the state. Using survey data, they plan to document sociodemographic inequities in COVID-19 testing, treatment, and recovery.</p> <p>SRO's involvement includes the administration of a Follow-up survey for respondents that completed a Baseline survey with the SPH team. Based on the sample information provided, we will be re-contacting approximately 3,995 respondents who have already completed (or are estimated) to complete the Baseline survey to administer the Follow-up survey.</p> <p>The Follow-up survey is estimated to be 45 minutes in length, and Respondents will be encouraged to complete the survey by web. However, SRO Interviewers will contact non-responders and conduct the interview over the telephone if the Respondents do not want to complete the survey on the web. HUM00181068 - Year 3 IRB Exempt - Budget:\$841,375 Total used:\$649,836 HUM00234617 - Year 4 - IRB approved - Budget:\$477,681</p>		
SRO Project Period	08/2021 - 09/2023		
Data Col Period	01/2022 - 07/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: 07/28/2023 DC Start: 09/14/2023 </div> <div> Pretest Start: Recruitment Start: 06/01/2023 GIT Start: SS Train End: 07/29/2023 DC End: 06/30/2023 </div> </div>		
Other Project Team Members	Bill Lokers: Financial Analyst Megan Hromco: Production Assistant Hueichun Peng: Technical Lead / WSMS db Programmer Peter Sparks: CAI Programmer (Blaise 5) Cheng Zhou: Web Component, ADT, Reports LihShwu Ke: DBA Architecture & Data Security Sarah Broumand: Data Manager Deb Wilson: Help Desk		
Other Project Name			
Sample Mgmt System	Web SMS		
Data Col Tool	Blaise 5		
Hardware	Laptop; Desktop		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Other (HSIP VISA Gift Card)		
Payment Method	NA		
=====			
Report Period	Jan, 2024 (MI CReSS (Year 3 & 4))		Implementing

Risk Level	Some Concerns			
Monthly Updates	<p>Cohort 1 - Completed in field and data has been delivered. Final report delivered - 12/19/2023 PI has asked for additional details in the Final Report - Due March 1, 2024</p> <p>Cohort 2 launched - Sept 14, 2023 - Arabic - In testing - Adding/extending CATI reminder calling to releases 1 to 7. - Added an additional Hardcopy reminder (#2) in an attempt to get closer to the Response Rate achieved for FO1 - Implementing a change in incentive for those who have not yet completed. \$25 to \$50.</p>			
Special Issues	<p>Proposal for Release 9-16 submitted 1/19/2024. Looks promising.</p> <p>LOW RR - Starting to look more into why we are not seeing the same Response Rate as FO1 for the same releases. - Lower # of attempts currently compared to FO1 - Continue to see mentions of the U of M data breach as to why Rs don't want to complete the FO2 Survey. Discussed being more proactive and sending a letter to the panel explaining the impact to their data which was just name and address</p>			
Cost as of Jan 20, 2024	Total Cost to Date (direct + indirect):			274,685.88
	Est Cost at Completion (E\$AC):			463,767.98
	Total Budget:			477,681.00
	Variance (Total Budget minus- E\$AC):			13,913.02
	Reason for Variance:			Fewer hours billed to project than estimated/projected.
Projections as of Jan 20, 2024	Dollars Projected for Month:			67,885.58
	Actual Dollars Used:			59,189.70
	Variance (Projected minus Actual):			8,698.88
	Reason for Variance:			Fewer hours by hourly staff due to vacation/sick time.
Measures		Units at Complete	RR	HPI
	Current Goal:	1900	77	3
	Goal at Completion:	2030	80%	3
	Current Actual:	1536	62.8	6
	Estimate at Complete:	1850	73%	6.5
	Variance:	-130	-7%	3.5
Other Measures	Targeting 80% of eligible Rs that completed the Main survey to complete the MoCA section in CATI. We are currently at 90% of those who are eligible. MoCA is currently .64 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	Richard Miech (SRC)		
Investigator/Clients			
Funding Agency	National Institute on Drug Abuse, one of the National Institutes of Health.		
IRB	HUM#: 00217920	Period of Approval: from 7/20/22 No CR	
Project Team	Project Lead: Rebecca Gatward Budget Analyst: Dean E Stevens Production Manager: Margaret Lavanger Senior Project Advisor: Gregg Peterson Production Manager 1: Dominic Bonanni Production Manager 2:		
Proposal #	no data		
Description	<p>Since 1975 the MTF survey has measured drug and alcohol use and related attitudes among adolescent students nationwide. A nationally representative sample of survey participants report their drug use behaviors across three time periods: lifetime, past year, and past month. The survey is funded by the NIDA, a component of the National Institutes of Health (NIH), and conducted by the University of Michigan.</p> <p>It is based on two interconnected series of surveys using nationally representative samples:</p> <p>(a) self-administered annual in-school surveys of 8th, 10th, and 12th graders (~45,000) in 400 schools. Proctors (SRO interviewers) coordinate and administer the data collection in schools (either FTF or remotely without visiting the schools).</p> <p>(b) panels of high school graduates aged 19-30, 35, 40,45, 50, 55, and 60 (now primarily surveyed by web). Panel members aged 19-30 are invited to participate every other year/asked to complete a web survey and the older sample members are sent questionnaires (mail and web) at five-year interval. The MTF panel study has three parts - early in the year a newsletter is mailed to panel members. If the newsletter is returned (undelivered) locating effort targets these panel members and others who have not participated for X years. The web panel launches (web) in spring and in around June a telephone non-response effort begins for those invited to participate. The panel members are recruited from the 12th graders who participate in the base year study.</p> <p>Press releases and published results can be found here.. http://www.monitoringthefuture.org/</p>		
SRO Project Period	04/2022 - 03/2027		
Data Col Period	04/2022 - 03/2027		
Security Plan	Yes		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	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	Jan, 2024 (MTF Base Year 2022_27)		Implementing
Risk Level	On Track		
Monthly Updates	January 2023 - Interviewer trainings were conducted (six sessions of around 3 hours, plus home study, HOPs and Certification).		

Some further topics will be covered during weekly team leader group conference calls.

- Production version of WebSMS and the Qualtrics surveys were created by 1/29.

- Interviewers began contacting school staff from 1/18 to confirm survey dates and make arrangements for a pre-survey meeting with key staff.

As of today (2/19) the first school survey was successfully completed on 2/12 (to schedule). This is the first surveys to be completed in Qualtrics. So far, no issues have been identified. WebSMS is pulling in data from Qualtrics.

Special Issues

Cost as of Feb 16, 2024	Total Cost to Date (direct + indirect):	1,923,544.18
	Est Cost at Completion (E\$AC):	6,802,569.67
	Total Budget:	9,778,060.00
	Variance (Total Budget minus- E\$AC):	2,975,490.33

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 Feb 16, 2024	Dollars Projected for Month:	137,573.61
	Actual Dollars Used:	68,395.68
	Variance (Projected minus Actual):	69,177.93

Reason for Variance:

Source of variance is salary costs (IWER hours). Projected hours were much higher than actuals. Projections for future survey years will be adjusted.

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

Other Measures

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

Report Period	Jan, 2024 (MTF Early Panel Pilot)		Initiation
Risk Level	On Track		
Monthly Updates	1. Project Management -Worked with the MTF study team on testing the survey forms (both survey forms and specs forms) via Qualtrics. -Created a sample release schedule 2. Web SMS -Worked with MTF study team on connecting Qualtrics and Web SMS. -Started Web SMS programming		
Special Issues			

Cost as of Jan 31, 2024	Total Cost to Date (direct + indirect):	7,568.14
	Est Cost at Completion (E\$AC):	282,263.76
	Total Budget:	288,529.00
	Variance (Total Budget minus- E\$AC):	6,265.24
	Reason for Variance:	Only December 2023 was projected. Projections will be entered/updated in January.

Projections as of Jan 31, 2024	Dollars Projected for Month:	7,187.00
	Actual Dollars Used:	5,929.69
	Variance (Projected minus Actual):	1,257.31
	Reason for Variance:	Not everyone charged as projected because some work moved into January.

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

Other Measures

Project Name	(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027 (On Track)		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 2,496,935.00	Indirect Budget: 1,398,282.00	Total Budget: 3,895,217.00
Principal	Megan Patrick (UM-SRC)		
Investigator/Clients			
Funding Agency			
IRB	HUM#: 00217920		Period of Approval:
Project Team	Project Lead: Donnalee Ann Grey-Farquharson		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lloyd Fate Hemingway		
	Senior Project Advisor: Rebecca Gatward		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>This project is a continuation of MTF Illume Web 2021.</p> <p>PI staff will edit and test 12 survey versions, all previously programmed in Illume by SRO. SRO will further test the surveys as part of the systems integration process. All 12 surveys will be launched in 2021. After testing is complete, SRO will launch the 2021 Web survey data collection with an estimated sample size of 20,000 cases identified by the Principal Investigator who will deliver the contact information including e-mail address to SRO. The Web survey data collection will replace aspects of the standard mail-based data collection. Both the separately funded Winter Location calling effort and Non-Response follow-up calling will include this sample – with the calling effort being integrated with the standard MTF activities.</p>		
SRO Project Period	01/2022 - 03/2027		
Data Col Period	04/2022 - 10/2026		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Rebecca Gatward (SPA), Donnalee Grey-Farquharson, Lloyd Hemingway, Dave Dybicki, Max Malholtra, Hueichun Peng, Shaowei Sun, Peter Sparks, Ashwin Dey, Hongyu Johnson, Brad Goodwin, Edward Green.		
Other Project Name	MTF		
Sample Mgmt System	Web SMS		
Data Col Tool	Other (Qualtrics)		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	ISR Group (MTF Staff)		
Payment Type	Check, prepaid; Check, post		
Payment Method	Other (MTF Staff handles this)		

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

Cost as of Jan 31, 2024	Total Cost to Date (direct + indirect):	1,278,976.95
	Est Cost at Completion (E\$AC):	3,891,846.78
	Total Budget:	3,895,217.00
	Variance (Total Budget minus- E\$AC):	3,370.22
	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 Jan 31, 2024	Dollars Projected for Month:	53,696.24
	Actual Dollars Used:	45,903.66
	Variance (Projected minus Actual):	7,792.58
	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	(PR-PSID) Puerto Rico Panel Study of Income Dynamics (Some Concerns)		
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 828,581.00	Indirect Budget: 464,004.00	Total Budget: 1,292,585.00
Principal	Narayan Sastry (University of Michigan)		
Investigator/Clients	Elizabeth Fussel (Brown University)		
Funding Agency	NICHD, with supplemental funding being sought from NIA		
IRB	HUM#: HUM00197300		Period of Approval: 4/5/2022-3/22/24
Project Team	Project Lead: Camila Kendall Budget Analyst: Ivanna Iavorska-Em Production Manager: Senior Project Advisor: Stephanie A Chardoul Production Manager 1: Camila Kendall Production Manager 2:		
Proposal #	no data		
Description	SRO will work with the PIs and a local survey firm in Puerto Rico, Estudios Técnicos (ETI), to develop a sample frame, sample design, questionnaire and data collection protocols for both pilot data collection (in 2022) and baseline data collection (in 2023). DMSS will provide assistance with sample design and implementation, responsive design, panel maintenance issues, and creation of sample weights. SRO will update the PSID-21 Spanish instrument for use specifically in PR. SRO will assist with the preparation of training materials for Listing training, Pretest and Main Data collection and will travel to PR to be on-site for these trainings. SRO will define reports for production and quality control monitoring that will be programmed through the SurveyTrak system, and train the research team on using these reports. All data will be collected by ETI's interviewers in PR and will be encrypted and transmitted daily via SurveyTrak to a secure SRC server. SRO will also assist with data processing.		
SRO Project Period	01/2022 - 12/2023		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 10/01/2021 Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Shonda Kruger-Ndiaye & Camila Kendall -- Co-Project Leads Raphael Nishimura -- Sampling Tech Team: Marsha Skoman (Tech Lead & STrak Programmer), Jude Purillo (Lead Blaise Programmer), Kelly Lieske (Programming Support), Valyn Dall (Data Manager), Jennie Williams (Data Management Support), Emmanuel Ellis (Help Desk), Cheng Zhou (Database setup), Lihshwu Ke (Database set up) Spanish Testing and Project Support: Liliana Grueber, Alondra Ortiz-Ortiz, Mabel Hernandez Duran (PSID Temp)		
Other Project Name			
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop		
DE Software	N/A		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	Other (ETI (Puerto Rican Survey Firm))		
Payment Type	Check, post (Varies by study phase); Cash, post (Varies by study phase)		
Payment Method	Other (Via ETI Systems)		

Report Period	Jan, 2024 (PR-PSID)		Initiation
Risk Level	Some Concerns		
Monthly Updates	<p>SRO, ETI, and PIs coordinated to develop letterhead that had logos for all collaborators. Determined Advance Letter mail date (2/1). Determined that all 120 recruited lines would be loaded as the pretest sample. Goal is to complete 75 IWs.</p> <p>ETI reported that the laptops were loaded and ready -- SRO raised concerns as they loaded the laptops before all files were provided (SRO provided files on 1/15, ETI reported laptops were ready on 1/9).</p> <p>SRO focused on preparing for Pretest Training (1/30-2/2). Finalized training material development and coordinated</p>		

with Spanish resources to finalize translations of training materials. SRO coordinated with ETI to get training materials printed.

Met with ETI on 1/29 for pre-training planning day -- determined that all of the laptops had been loaded incorrectly by ETI's contractor. SRO worked with HD to ensure that all laptops were loaded properly for training.

SRO successfully trained 5 ETI interviewers, and 2 project manager supervisors on GIT and PSID concepts, in Spanish. All interviewers were certified in both the Family Listing and the full PSID interview. 1 SRO Project Co-Lead worked with ETI from PR on 2/8-2/9: Was able to recertify an interviewer on the Family Listing, certify the last project manager on the Family Listing, observe an in-person interview, and assist with troubleshooting tech problems.

Special Issues	Slight overrun. Much of the Post Collection Processing that is planned is new for SRO.		
Cost as of Feb 16, 2024	Total Cost to Date (direct + indirect):		558,727.31
	Est Cost at Completion (E\$AC):		1,368,730.40
	Total Budget:		1,292,585.00
	Variance (Total Budget minus- E\$AC):		-76,145.40
	Reason for Variance:	Projected costs to complete increased by ~15K between Dec-Jan. Biggest driver was adding hours for Bilingual Training support. Also added projections for tech lead, and data managers to support Prod ending in mid-March.	

Projections as of Feb 16, 2024	Dollars Projected for Month:		43,766.67
	Actual Dollars Used:		38,422.94
	Variance (Projected minus Actual):		5,343.73
	Reason for Variance: Actuals for programmers were less than projected.		

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

Other Measures

Project Name	(PSID CDS 2023) PSID Childhood Development Supplement 2023 (On Track)		
Project Mode	Primary: Mixed	Secondary: Face to Face	Total of Modes: 4
Project Type	Sponsored Projects		
Budget	Direct Budget: 0.10	Indirect Budget: 0.10	Total Budget: 0.20
Principal	Narayan Sastry (SRC)		
Investigator/Clients			
Funding Agency			
IRB	HUM#: HUM00166316		Period of Approval:
Project Team	Project Lead: Piotr Dworak		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager: Sarah Crane		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>A 2023 wave of the Childhood Development Supplement (CDS) is going to be conducted in two phases. Phase 1: from September 2023 – May 2024 and Phase 2: from June 2024 - January 2025. The sample for CDS is comprised of the PSID-eligible children (ages 0 -17) from the Core 2023 families we interview and their primary caregivers. Approximately 3,700 families will be included, with some Core families containing several CDS children. As part of the CDS Phase 1, families are asked to complete phone coverscreen and PCG interviews followed by mixed Adolescent 12 - 17 phone/web interview (including an IVR component in phone mode). In Phase 2 families will be visited in person (where possible) and asked to complete Child 8 - 11 interviews (via Video if out of area), provide physical measurements, educational assessments, saliva collection, time diaries, school and birth record linkage forms. CDS interviewing will be conducted by a mix of SSL and Field interviewers. Coverscreen and PCG interviews will be handled by SurveyTrak and Blaise 4.8, Adolescent interviews will be handled by MSMS and Blaise 5.</p>		
SRO Project Period	08/2022 - 01/2025		
Data Col Period	09/2023 - 01/2025		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 10/01/2022 Pretest End: 05/14/2023 Staffing Complete: 09/01/2023 SS Train Start: 01/18/2024 DC Start: 01/22/2024 </div> <div> Pretest Start: 04/24/2023 Recruitment Start: 07/01/2023 GIT Start: 12/12/1999 SS Train End: 01/22/2024 DC End: 07/31/2024 </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	SurveyTrak; MSMS; Other (WSMS)		
Data Col Tool	Blaise 4.8; Blaise 5; Other (IVR)		
Hardware	Laptop; Desktop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Time Diary Coding)		
QC Recording Tool	DRI-CARI; Camtasia		
Incentive	Yes, R; Yes, INF; Yes, Other (PCG)		
Administration	SRO Group		
Payment Type	Check, post (75 + interventions); Other (ePay)		
Payment Method	Check through other system (PSID RAPS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (PSID RAPS)		

Report Period	Jan, 2024 (PSID CDS 2023)		Implementing
Risk Level	On Track		
Monthly Updates	<p>(MPR had just ate 30 minutes of my work ... could it act more like Google Docs and save instantaneously or intermittently? Below is the 2nd abridged version):</p> <p>CDS data collection launched in January. So far we have no concerns to report other than IVR and a note about Phase 2 (below).</p> <p>Staff: -- 48 interviewers + 2 locators (no attrition after the training) -- CDS staff is shared with other projects (PSID Saliva, MTF, BFY, etc.)</p> <p>Sample:</p>		

- Release 1: 2260 (34 Spanish)
- Release 2: 759 (66 Spanish)
- Release 3: 144 (forthcoming)

Data collection (goal / actual):

- CS: 898 / 908
- PCG: 360 / 471
- Adolescents: 142 / 111

Special Issues	<p>IVR: we have not launched IVR data collection yet. There were lingering issues with the testing / training environment which prevented us from fully training iwers -- those issues were resolved as of 2/23. There were also a few survey programming errors uncovered by the PSID IDPM team which are still being programmed. We expect to launch IVR week of 2/25.</p> <p>Phase 2: Pls revisited the prospect of at-home visits with some portion of the CDS23 sample. Scope discussions are in progress right now but there is a desire to start the work in the Fall of 2024.</p>			
Cost as of	Total Cost to Date (direct + indirect):			0.00
	Est Cost at Completion (E\$AC):			0.00
	Total Budget:			0.20
	Variance (Total Budget minus- E\$AC):			0.00
	Reason for Variance:	<p>Since start in Aug 2022 through Jan 2024 CDS Projected spending \$1.01M direct and spent \$936K direct. Our total Phase 1 budget (Aug-22 through end of Phase 1 (Aug-24) and close-out) is estimated @ \$3.6M direct. There is however a strong possibility that some form of Phase 2 (at home) will be added.</p>		
Projections as of	Dollars Projected for Month:			0.00
	Actual Dollars Used:			0.00
	Variance (Projected minus Actual):			0.00
	Reason for Variance:	<p>Prior to January, monthly costs were difficult to analyze due to fund transfers across the funding sources. In January, we projected to spend \$229 and spent \$141K however, another \$60K is going to be added to January after recertification.</p>		
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	<p>TAS 2023 is the 10th Wave of TAS study, part of the PSID Suite of projects.</p> <p>Approximately 3,000 youth aged 18 - 28 years who are part of families who participate in the ongoing Panel Study of Income Dynamics (PSID) are invited to take part in a 60-minute web survey. In 2023, all respondents go through the same sequential treatment - non-responders to web survey are called as part of the non-response follow up. Respondents will be offered a up to \$145 for completing the interview which includes a \$75 base payment and possible other interventions. Phone interviews will be completed by Survey Research Center Survey Services Lab (SSL) interviewers.</p>		
SRO Project Period	05/2023 - 07/2024		
Data Col Period	10/2023 - 05/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 05/01/2023 Pretest End: Staffing Complete: SS Train Start: 10/02/2023 DC Start: 10/03/2023 </div> <div> Pretest Start: Recruitment Start: 07/23/2023 GIT Start: 10/03/2023 SS Train End: 10/06/2023 DC End: 05/31/2023 </div> </div>		
Other Project Team Members	PSID Suite SRO Lead - Shonda Kruger-Ndiaye; TSG Tech Leads - Jim Rodgers, Laura Yoder, and Jeff Smith; Data Manager - Rose Zybel; Blaise Programmer - Youhong Liu; Portal - Jude Perillo MSMS Programmers - Pam Swanson and Darnell Christian; Help Desk Support - Kyle Goodman; Testing Coordinator 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	Jan, 2024 (PSID TAS 2023)		Implementing
Risk Level	On Track		
Monthly Updates	<p>Summary of January Activities</p> <p>Production</p> <ul style="list-style-type: none"> - TAS production continues slightly ahead of goals with 1483 total completes, which is 52 ahead of the cumulative goal at the end of January. Rel1 has a response rate of 83% and Rel2 has a response rate of 70%. - Respondents continue to receive sequenced (planned) system emails and iwer sent text messages. Message frequency is ~1X a week for Rel1 and ~2x a week for Rel2. - All Interim Rel1 CPs received a mailed communication offering the CP \$20 if R completes by mid-February. The mailing included a sealed letter to R with an invitation letter for the CP to provide R. CPs will also be sent two emails and text messages communicating this offer, which must be sent outside of DCA but logged as a contact 		

attempt in DCA.

- The SSL moved to remote work over 4 different days due to weather. TAS was able to seamlessly transition for these days to ensure production continued while inclement weather was an issue for interviewers.
- Other current R protocols include: locating, assigned sample calling (respondents without a cell), and suspend follow up.

Staffing and Training

- No interviewer attrition. The project expects to meet production goals with the current number of interviewers and is no longer planning a February text training.

Technical:

- The project released cases on 1/2/24 where R was less than 18 at the start of TAS production but turned 18 by the end of 2023. Due to the Blaise specification and programming these cases remained locked out of the instrument despite being released. A data model update was required to fix this access issue. The fix was programmed, tested in CTT, tested in INT 2, and promoted in four business days.
- Pooled delivery rules were reviewed to ensure appropriate case delivery and calling for non-response calls. Rules were adjusted by adding a customizable sort order to ensure Rel 1 hits the top of the queue as other releases start non-response calling.
- Reports are now correctly displaying completed in the correct week. An MSMS Admin event set the first finalized date to 11/30 for ~150 Rel 2 cases. TAS switched to the Last Finalized date for the correction.

Management

- The project planned the contact protocol for the final two project releases, which will take place in February 2024.
- An IRB submission made in mid-December was not approved by mid-January. This prompted TAS to recommend the PI check in with IRB, which prompted a quick review and ultimate approval of the amendment.
- TAS continues to rely heavily on SSA support for its mailing schedule. With some extended OOTO time, SSA training continues to ensure all tasks are sufficiently covered.

Special Issues

Cost as of Feb 16, 2024	Total Cost to Date (direct + indirect):	666,882.25
	Est Cost at Completion (E\$AC):	1,346,723.00
	Total Budget:	1,457,428.00
	Variance (Total Budget minus- E\$AC):	110,705.00
	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 Feb 16, 2024	Dollars Projected for Month:	136,402.97
	Actual Dollars Used:	104,695.97
	Variance (Projected minus Actual):	31,707.00
	Reason for Variance:	Technology costs came in lower than projected.

Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:		89%	
	Current Actual:	1483	75%	1.9
	Estimate at Complete:			3.7
	Variance:			

Other Measures

Project Name	(PSID23) Panel Study of Income Dynamics Core 2023 (On Track)		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 6,235,802.00	Indirect Budget: 0.00	Total Budget: 6,235,802.00
Principal Investigator/Clients	Katherine McGonagle (UM-SRC-PSID) Narayan Sastry (UM-SRC-PSID) Esther Friedman (UM-SRC-PSID)		
Funding Agency			
IRB	HUM#: HUM00062417		Period of Approval: 3/22/22-3/21/24
Project Team	Project Lead: Rachel Anne Orlowski Budget Analyst: Ivanna Iavorska-Em Production Manager: Stacy Quisenberry Senior Project Advisor: Stephanie A Chardoul Production Manager 1: Daric Thorne Production Manager 2: Shonda R Kruger-Ndiaye		
Proposal #	no data		
Description	<p>The Panel Study of Income Dynamics (PSID--also known to Respondents as the Family Economics Study or FES) is a longitudinal survey of several thousand individuals and their families, carried out since 1968 and conducted every two years. The sample is comprised of respondents from the 4,800 original families as well as new (immigrant) sample added in 1997/1999 and 2017/2019. The total 2023 sample size will be approx. 11,200, with approx. 9,650 completed interviews expected. Most of the information collected is about family composition and changes (marriages, divorces, births, deaths, people moving in and out); income sources and amounts; employment and pensions; and wealth. There are also questions about housing; education; vehicles; health; fertility; COVID-19; and money spent on food, healthcare, and school. The main focus is on how these family composition and financial factors interact with each other and how they change over time. The survey will be administered via web and telephone, with the expectation that more surveys will be completed via web than telephone (which will be a first for the study).</p> <p>During the 2023 wave, saliva samples will be collected for the first time on PSID Core. The Core interview must be completed to be eligible for saliva collection. Saliva sample participants that are eligible for collection during Core are adults related to Child Development Supplement (CDS) children but do not live with them. Interviewers will be trained on both the interview and saliva collection protocols. Both data collection efforts will be managed in the same MSMS project.</p> <p>The 2023 waves of CDS and the Transition into Adulthood (TAS) will follow PSID Core data collection. CDS and TAS eligibility is dependent upon completion of PSID Core.</p>		
SRO Project Period	03/2022 - 09/2024		
Data Col Period	03/2023 - 03/2024		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 03/01/2022</div><div>Pretest End: 10/31/2022</div><div>Staffing Complete: 04/21/2023</div><div>SS Train Start: 03/08/2023</div><div>DC Start: 03/23/2023</div></div> <div><div>Pretest Start: 10/11/2022</div><div>Recruitment Start: 09/19/2022</div><div>GIT Start: 06/05/2023</div><div>SS Train End: 06/11/2023</div><div>DC End: 03/31/2024</div></div>		
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	Jan, 2024 (PSID23)		Implementing	
Risk Level	On Track			
Monthly Updates	Summary of January 2024 Activities Forthcoming			
Special Issues	Saliva data collection (including FTF visits) starting later than originally planned. Saliva FTF effort expected to continue into March.			
Cost as of Feb 21, 2024	Total Cost to Date (direct + indirect):		5,058,349.25	
	Est Cost at Completion (E\$AC):		5,762,010.25	
	Total Budget:		6,235,802.00	
	Variance (Total Budget minus- E\$AC):		473,791.75	
	Reason for Variance:		Review of projections not complete. 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 Feb 21, 2024	Dollars Projected for Month:		457,479.93	
	Actual Dollars Used:		373,832.23	
	Variance (Projected minus Actual):		83,647.70	
	Reason for Variance:		Review of costs not complete. 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:	9188	86%	5.7
	Estimate at Complete:	8956	85%	5.73
	Variance:	690	4%	0.85
Other Measures	Notes for Measures Above: From Dashboard. Units Completed = 9188 iws (2475 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:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations.</p> <p>The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 600 interviews.</p>		
SRO Project Period	01/2024 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div><div><div>Pre Production Start:</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start: 01/02/2024</div></div><div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End: 06/30/2024</div></div></div>		
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	Jan, 2024 (SCA 2024)		Initiation
Risk Level	On Track		
Monthly Updates	<p>SCA JAN 2024 began as schedule on Tuesday 01/02/2024, and ended on, 1 day earlier than scheduled, Sunday 1/28/2024.</p> <p>We completed 601 interviews in January 2024 (320/181/100), 1 interview above our goals of 600 (320/181/100).</p> <p>The cumulative HPI for the month was 3.26 (.06 higher than our budgeted goal of 3.20). Though higher than our budgeted goal, this was the lowest HPI achieved in several months (due in part to the national name recognition provided to the University by the National Champion Wolverines),</p>		
Special Issues			
Cost as of Feb 13, 2024	Total Cost to Date (direct + indirect):		84,851.26
	Est Cost at Completion (E\$AC):		635,273.45

	Total Budget:	680,222.00
	Variance (Total Budget minus- E\$AC):	44,948.55
	Reason for Variance:	
Projections as of Feb 13, 2024	Dollars Projected for Month:	113,370.33
	Actual Dollars Used:	84,851.26
	Variance (Projected minus Actual):	44,948.55
	Reason for Variance:	Budgeted training was postponed.

Measures		Units at Complete	RR	HPI
	Current Goal:	600		3.2
	Goal at Completion:	600		3.2
	Current Actual:	601		3.26
	Estimate at Complete:	601		3.26
	Variance:	+1		+0.06

Other Measures

Project Name	(SRS 2021) Social Relations 2023 (Attention!)		
Project Mode	Primary: Face to Face Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 3,767,057.11	Indirect Budget: 2,109,553.00	Total Budget: 5,876,610.11
Principal	Toni Antonucci (ISR)		
Investigator/Clients	Kristine Ajrouch (ISR)		
	Laura Zahodne (ISR)		
Funding Agency	NIH		
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Tagh Reid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 3400 interviews with respondents aged 35 years or older residing in the tri-county area of Southeast Michigan (Wayne, Oakland and Macomb counties) and 244 interviews with original Social Relations panel sample members aged younger than 65 years of age. The project involves screening up to 6900 new sample lines., with one selected respondent per household. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements (height, weight, blood pressure, grip strength) and saliva collection. The SRS 2023 project will use the same instrument programmed for the D-Amp project, with the only new programming being that for a screener. The screener will be translated into Arabic. No informant or proxy interview is included in the project scope. Interviews will be conducted in English or Arabic.		
SRO Project Period	09/2021 - 05/2023		
Data Col Period	05/2023 - 04/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 09/01/2022 Pretest End: Staffing Complete: 04/10/2023 SS Train Start: 05/18/2023 DC Start: 05/30/2023 </div> <div> Pretest Start: Recruitment Start: 02/01/2023 GIT Start: 05/16/2023 SS Train End: 05/25/2023 DC End: 12/31/2024 </div> </div>		
Other Project Team Members	Tagh Reid 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	Jan, 2024 (SRS 2021)		Implementing
Risk Level	Attention!		
Monthly Updates	<p>The Social Relations Study continues to be well behind schedule in terms of completing screeners and cases. Screening continues to be very difficult, with some areas being very hostile to minority interviewers (or to any interviewers). Hours per screener are far higher than were budgeted, and the project continues to be hampered by excessive attrition, resulting in far fewer interviewer hours than needed to support the level of production needed. The production deficit is related to having fewer interviewers than needed, and higher hours per screen than budgeted. The interview length is 130 minutes (compared to 140 budgeted) and saliva cooperation is around 84% (slightly higher than budgeted).</p> <p>On January 4, we provided the PIs with updated production charts showing the deficits in production and high spending compared to % production completed. The PIs acknowledged the numbers. Also during the Jan 4 2024 meeting we discussed how best to use the remaining money on the project. We also reviewed suggestions from</p>		

SDG. The PIs are resistant to considering scope reductions. We have been and continue to be very clear that the project is in financial trouble and they will not achieve the budgeted number of interviews without significant additional funding (including highlighting this in monthly reports).

On Jan 11, SRO provided the research team with an estimate of monthly production and spending, which would result in about 1,477 completed main using the existing budget. This would involve extending the project until November. The LCD team shared that they intended to set up a meeting with the SRS project officer. The PIs asked for a ballpark budget to complete the full work scope --the PIs did not want to incorporate any suggested scope modifications in the budgets. On Feb 15 we gave the PIs a ballpark number for completion of the full work scope. *From Feb 1 going forward, SRS would need an estimated additional \$3.8 million in direct costs, assuming the current hours per screen and hours per interview. This estimate takes into account the approximately \$2.18 million in direct costs remaining as of February 1, 2024.* The PIs indicated that they would seek additional funding for the project. The Feb 15 meeting notes are uploaded to MPR.

In mid-January, the research team approved moving forward with preparation for release of panel cases. The study continues to experience interviewer attrition, including from the small group of on-staff interviewers training at the end of November/beginning December. The research team approved moving forward with a new recruitment effort to bring on screening interviewers.

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

Special Issues		We have been keeping the dire financial situation of the study in front of the PIs as frequently as possible, including revising the monthly activity report to emphasize the financial and production situation. The PIs acknowledged the poor study outcomes in January and asked for updated projections to present to the program officer. Projections for completing the full work scope were given to the PIs on 2/15/2024.		
		NOTE: We are projecting that all of the project budget will be fully used for data collection, however we will not be able to take the budgeted number of interviews given the very high HPI.		
Cost as of Feb 16, 2024	Total Cost to Date (direct + indirect):			2,471,086.18
	Est Cost at Completion (E\$AC):			5,875,415.56
	Total Budget:			5,876,610.11
	Variance (Total Budget minus- E\$AC):			1,194.55
	Reason for Variance:	We are projecting that the entire budget will be used for data collection. We are not projecting an overrun. We are assuming that the work scope will be decreased to match the budget available.		
Projections as of Feb 16, 2024	Dollars Projected for Month:			359,538.41
	Actual Dollars Used:			202,546.46
	Variance (Projected minus Actual):			156,991.95
	Reason for Variance:	Production is far lower than expected or budgeted due to excessive interviewer attrition and very high HPI. This means that interviewer travel, respondent payments and costs associated with production are all running lower than expected. We substantially reduced interviewer hour projections (and all related costs), however actuals keep coming in lower than expectations due to increased attrition or lower iwer effort. We are making more adjustments to try to get projections in line with spending.		
Measures		Units at Complete	RR	HPI
	Current Goal:	3644	88% scr, 75% main	10.4 with screening
	Goal at Completion:			
	Current Actual:	596	24% scr, 48% main	21 with screening
	Estimate at Complete:			
	Variance:			
Other Measures		RR shown above reflect completion based on the released sample. Current length 129 minutes, budgeted 140 minutes. Saliva participation rate is 84%, budgeted at 80%		

Project Name	(STARRS-LS VA HEARTH) STARRS-LS VA - Housing, Employment, Assessment Risk, Transitions, Help (HEARTH) Project Qualitative Interviews (On Track)		
Project Mode	Primary: Qualitative	Total of Modes: 1	
Project Type	Sponsored Projects		
Budget	Direct Budget: 57,655.00	Indirect Budget: 32,287.00	Total Budget: 89,942.00
Principal	James Wagner (University of Michigan - Survey Research Center)		
Investigator/Clients	Ronald Kessler (Harvard Medical School)		
Funding Agency	Department of Veterans Affairs to Harvard Medical School; University of Michigan Institute for Social Research subcontract agreement with the Harvard Medical School for performance of its assigned tasks		
IRB	HUM#: HUM00235584	Period of Approval: 6/7/2023 - 6/6/2024	
Project Team	Project Lead: Margaret Lee Hudson Budget Analyst: William Lokers Production Manager: Derek Dubuque Senior Project Advisor: Lisa S Holland Production Manager 1: Meredith A House Production Manager 2: Austin De Spirito		
Proposal #	no data		
Description	<p>The STARRS-LS collaboration with VA HEARTH (Housing Employment Assessment Risk Transitions Help) Qualitative Interviews is part of a larger project led by STARRS site principal investigator, Dr. Ron Kessler, at the Harvard Medical School (HMS). The Army Study to Assess Risk and Resilience in Servicemembers (STARRS) is a long-term prospective study (funded so far for close to 15 years) of risk and protective factors for suicidal behaviors among US Army soldiers and, in recent years, Veterans who were soldiers at the beginning of the study. One line of research in STARRS has been the development of machine learning models using information obtained while soldiers were still on active duty to predict homelessness after becoming a Veteran. The HMS STARRS team developed successful models of this sort and published the results. These publications came to the attention of VHA leadership, who approached the HMS STARRS team to establish a collaboration to use these models to target recently separated Veterans for intensive transitional services interventions designed to prevent homelessness. As part of the larger project, the HMS STARRS team will be updating the risk prediction models to be created based on a short set of self-report questions that could be embedded into a participant intake form. This intake form can then be used by VA HEARTH social workers in new samples of transitioning service members (TSMs) (not the STARRS-LS respondents) to determine which TSMs are at high risk of post-separation homelessness.</p> <p>The STARRS models were developed by working with a sample of approximately 15,000 STARRS survey respondents who were interviewed initially when they were on active duty and then followed and reinterviewed after they became Veterans. Several hundred of these STARRS Veterans became homeless after separation. A second aspect of the research is for 50-100 of these Veterans to be recruited to participate in a follow-up focused qualitative interview designed to elicit information about the ways VA might be able to improve transitional services for soldiers at high risk of homelessness after leaving active service and becoming Veterans. With a subcontract from HMS, the U-M Survey Research Center (SRC) Survey Research Operations (SRO) will recruit STARRS-LS respondents for the qualitative interviews, carry out the interviews, transcribe and de-identify the interviews, and link the de-identified/coded interview transcripts to existing de-identified/coded survey data files for these respondents. The HMS STARRS team will then carry out content analysis of these transcripts to elicit information that might help the VA HEARTH team further design their interventions.</p>		
SRO Project Period	05/2023 - 02/2024		
Data Col Period	10/2023 - 02/2024		
Security Plan	Yes		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Meredith House - STARRS LS Survey Director Margaret Hudson - Project Manager Derek Dubuque - Scheduler Austin De Spirito - Interview Redaction and QC 4 temp research technicians hired for qualitative interviews 4 Survey Techs assisting with interview facilitation		
Other Project Name			
Sample Mgmt System	Other (Excel)		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		

Administration	SRO Group			
Payment Type	NA			
Payment Method	NA			

Report Period	Jan, 2024 (STARRS-LS VA HEARTH)		Implementing	
Risk Level	On Track			
Monthly Updates	<p>? The final 4 batches of email invitations (~100) were sent in the first 2 weeks of the month and interviews continued to be scheduled and conducted, tailing off by the 3rd week of the month.</p> <ul style="list-style-type: none">• During the month, we began implementing a text reminder message to respondents if they were more than five minutes late for their appointment and found it was successful in helping respondents keep their appointments. <p>? After consulting with Ron Kessler, Katie Koh, and Nancy Sampson, on January 23, the HEARTH team agreed that we would end additional recruitment efforts, working only to schedule the remaining recently interested Veterans.</p> <ul style="list-style-type: none">• The online form for Veterans to express interest in participation closed on January 31. The scheduling calendar will remain open for interviews through February 11. <p>? As of January 31, 54 interviews have been completed and 2 more are scheduled for early February.</p> <p>? As of the end of January, 25 redacted transcripts and two coded transcripts had been transferred to Harvard.</p> <p>? A. DeSpirito and M. Hudson continue to work on redacting the transcripts for the interviewers to code.</p> <p>? M. Hudson conducted an audit of the completion of the various deliverables for each completed interview (e.g., transcript file, coded file, R pay) and sent follow-ups to the interviewers on pieces that had yet to be completed.</p> <p>? The interviewers continue to code transcripts, with a goal of coding as many as possible by the end of February.</p> <p>? M. Hudson continues to join a weekly meeting of the PIs and student interviewers to check in.</p>			
Special Issues				
Cost as of Feb 16, 2024	Total Cost to Date (direct + indirect):			55,455.54
	Est Cost at Completion (E\$AC):			69,042.90
	Total Budget:			89,942.00
	Variance (Total Budget minus- E\$AC):			20,899.10
	Reason for Variance:			
Projections as of Feb 16, 2024	Dollars Projected for Month:			16,322.60
	Actual Dollars Used:			12,622.29
	Variance (Projected minus Actual):			3,700.31
	Reason for Variance:			Senior management (Holland, House, Hudson) charged hours fewer than projected.
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study (On Track)		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 8,809,515.00	Indirect Budget: 4,920,601.00	Total Budget: 13,730,116.00
Principal Investigator/Clients	James Wagner (University of Michigan) Robert Ursano (Uniformed Services University of the Health Science) Murray Stein / Ron Kessler (University of California San Diego / Harvard)		
Funding Agency	Department of Defense		
IRB	HUM#: HUM00180765	Period of Approval: 4/5/23 - 4/4/24	
Project Team	Project Lead: Meredith A House Budget Analyst: William Lokers Production Manager: Ruth B Philippou Senior Project Advisor: Lisa S Holland Production Manager 1: Jeffrey Albrecht Jr Production Manager 2: Lisa M Lewandowski-Romps		
Proposal #	no data		
Description	<p>This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.</p> <p>For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data.</p> <p>To date, we have completed 2 waves of STARRS-LS interviewing. During Wave 1, we attempted to contact 50,000 individuals and completed approximately 14,500 full interviews. All Wave 1 participants that completed a full Wave 1 interview were asked to participate in Wave 2. Waves 3 and 4, which are covered in this application, will include the full STARRS-LS Wave 2 sample, regardless of whether they completed the interview.</p> <p>In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys).</p>		
SRO Project Period	05/2020 - 04/2025		
Data Col Period	11/2022 - 04/2024		
Security Plan	Yes		
Milestones	<div> <div> Pre Production Start: 04/01/2022 Pretest End: Staffing Complete: 10/01/2022 SS Train Start: 11/14/2022 DC Start: 11/07/2022 </div> <div> Pretest Start: Recruitment Start: 07/23/2022 GIT Start: SS Train End: 11/17/2022 DC End: 04/15/2024 </div> </div>		
Other Project Team Members	Ryan Yoder, Keith Liebetreu, Becky Loomis, Steven Sonoras, Andrew Piskorowski, Rose Zdybel, Ji Qi, Makenna Harrison, Lamont Manley, Lisa Van Havermaet, Stephanie Windisch, Youhong Liu, Peter Sparks. Pam Swanson, Jim Rodgers, Marcus Blough, Nick Hinkle-DeGroot, Pete Westhead		
Other Project Name	STARRS-LS Continuation		
Sample Mgmt System	MSMS		
Data Col Tool	Blaise 5		
Hardware	Laptop; Desktop; [UM cell] Phone		
DE Software	N/A		
QC Recording Tool	Other (Blaise CARI)		
Incentive	Yes, R		

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

Report Period	Jan, 2024 (STARRS-LS Waves 3 & 4)	Implementing
Risk Level	On Track	
Monthly Updates	Activities for January 2024 include:	

Project Management and Planning:

- ? We sent weekly production updates to the Pls, 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 participated in discussions with the Pls/research team about development of the 5-year research plan for 2025-2030.
- o In the previous 5-year research plan, the GSC included a request to conduct a pilot study of a subsample from the original STARRS baseline sample of approximately 72,000 soldiers to determine participant count of a separate contact effort. We provided a summary of how that piloting activity was handled and resolved for inclusion in the current 5-year plan.
- ? James and Meredith participated in discussions with the Pls/research team about a possible web-based design, interviewing new recruits prior to basic training, for a new NSS.
- o To help inform design options for a web-based approach, Meredith sent an inquiry to Scott asking whether the Army would be able/allowed to share recruits' name, address, cell phone and email address with the STARRS research team so that we could make contact for the NSS survey administration. Scott did not initially believe that contact information could be shared, but he did not have a definitive answer and continued to look into the matter.
- ? IRB:
- o The team worked on completing a continuing review for the current STARRS-LS IRB protocol, due by April 4.
- o We started 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:
- ? After consulting with Ron, Katie Koh, and Nancy, on January 23, the HEARTH team agreed that we would end additional recruitment efforts, working only to schedule the remaining recently interested Veterans.
- The online form for Veterans to express interest in participation closed on January 31. The scheduling calendar will remain open for interviews through February 11.
- ? As of January 31, 54 interviews had been completed and 2 more had been scheduled.
- During the month, we began implementing a text reminder message to respondents if they were more than five minutes late for their appointment and found it was very successful in helping respondents keep their appointments.
- ? As of the end of January, 25 redacted transcripts and two coded transcripts had been transferred to Harvard. The student interviewers continued to work on coding their interviews.

Enclave and User Support:

- ? Annual DoD security training: Completed training renewal materials were due on January 31. As of the end of the month, there were only a handful of users who had not yet completed their training.
- ? Annual IA security review:
- o U-M sent vulnerability scans to AAG on January 30 and continued to work on gathering other documents to be sent.
- o On January 10, we learned the M&RA/AAG site visit will be postponed to later in February or early March due to the ongoing Continuing Resolution.
- ? 2023 repeat NDI search:
- o On January 31, we notified Enclave users that the results from the CDC-NDI death record search through the year 2021 were loaded to the Enclave.
- ? 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 The primary Windows Enclave server was successfully upgraded on January 18.
- o A planned IT outage for all of ISR was completed on January 27 from 5am to 10am.
- o The DUA with the VA was finalized and the two VA fellows were successful in gaining access 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 team worked to finalize the data transfer memo and establish an account for accessing the PGC's new server. When ready, we will be able to upload the file to it directly.

Public Use Data:

- ? Biosample flags, administrative variables, and inventory document:
- o SRO delivered biosample flag and administrative data materials to ICPSR on January 15; ICPSR confirmed they did not have any questions about the materials. 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 February 1, 2025, are as follows:
- o Replicates released: 13 of 14 released with 13,559 sample lines.
- o Completed interviews: 9,891 (9,299 web; 592 phone)
- o Replicate 11 ended production on January 7 with a final response rate of 74.1%, coming close to the wave average and surpassing the Wave 3 response rate of 72.7%.
- o Replicate 12 transitioned from Phase 3 to Phase 4 on January 17. Throughout the month, Replicate 12 trended behind the W4 average response rate due, in part, to lost calling days during the holidays. However, it performed about the same or better than it did in Wave 3. As of February 1, the response rate was 68.8%.
- o Replicate 13 transitioned from Phase 2 to Phase 3 on January 25. As of February 1, the response rate was 45.6% and tracking with the average rate. Rep 13 was performing about 1.5 percentage points higher than during

Wave 3 at this same point in the protocol.
o The response rate for completed replicates (Reps 1-11) is 75.4%.

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








Special Issues	No changes this month to the areas of risk and mitigation strategies.		
Cost as of Dec 31, 2023	Total Cost to Date (direct + indirect):		9,904,956.65
	Est Cost at Completion (E\$AC):		13,724,254.40
	Total Budget:		13,730,116.00
	Variance (Total Budget minus- E\$AC):		5,861.60
	Reason for Variance:	<p>We added into our projections, \$1,119,000 in costs for Wave 5 work to take place in Year 5. This changed our final projected variance from an underrun of \$284,336 to an overrun of \$834,664.</p> <p>We updated the overall 5-year budget amount to include the Year 5 budget submitted to USUHS in November. This increased the budget from \$12,889,590 to \$13,730,116, an increase of \$840,526.</p> <p>We arrive at an increase of \$840k as follows: We have received \$11.7M in funding so far: i. Year 1 \$2,478,561 ii. Year 2 \$2,737,646 iii. Year 3 \$3,470,063 iv. Year 4 \$3,015,794 Total = \$11,702,064 b. That leaves us with \$1,187,526 left for year 5...total funding of \$12,889,590 less \$11,702,064. c. For year 5 we need \$2,028,203...wave 4 year 5 \$909,203 plus wave 5 year 1 \$1,119,000. d. \$2,028,203 - \$1,187,526 = \$840,677 which gets us close to the difference (the increase of \$840,526). Bill noted there is probably some small adjustment or rounding happening somewhere, so it's not exact to the dollar.</p> <p>After updating the budget amount, our new projected underrun is \$5,862.</p>	

Projections as of Dec 31, 2023	Dollars Projected for Month:	298,820.32
	Actual Dollars Used:	258,700.34
	Variance (Projected minus Actual):	40,119.98
	Reason for Variance:	Underspent due to the December holidays (despite having reduced some projections) and due to projections (~80 hrs) still included (but not spent) for staff member who left the project.

Measures		Units at Complete	RR	HPI
	Current Goal:	10,800	75	10.2
	Goal at Completion:	10,800	75	10.2
	Current Actual:	9,891	75.3 (Reps 1-12)	11.3
	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
<i>TSME24 DCO System Support (483248)</i>	Initiatives	Implementing	Vivienne Y Outlaw	
<i>TSME24 MSMS performance work (425267)</i>	Initiatives	Initiation	Jim Rodgers	
<i>TSME24 MSMS Working Group (425197)</i>	Initiatives	Initiation	Kelly A Chatain	
<i>TSME24 QC Systems (483249)</i>	Initiatives	Implementing	Sarah Elisa Broumand	
<i>TSME24 SRO System Maintenance - General (483910)</i>	Initiatives	Implementing	Jeffrey L Smith	
<i>TSME24 SSL Autoscheduler interface development (42</i>	Initiatives	Implementing	Debbie Seale	
<i>TSME24 STrak: Migration to SQL Anywhere V17 (</i>	Initiatives	Initiation	Lawrence Daher	

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

Report Period	Jan, 2024 (TSME24 DCO System Support (483248))		Implementing
Risk Level	Some Concerns		
Monthly Updates	* Launch the TeamTailor (TT) Geocoding System: this system is fairly complicated and includes 3 key pieces: download data, geocode data, upload data. TT Download Module uses multiple TeamTailor APIs to download job applicant address info. DMSS (Wen) process geocodes the address info. TT Upload Module uploads the geocoded info (Homearea set of info) to TT. At start, we found different issues with the process and have fine tuned the whole work flow many times. Using API to download data takes a lot of time, so we wish TT can offer other options for us the download the data in a more organized manner (like BI Connector). * Set up calculation of years of service Report * Updated the criteria of Pay Change Excel		
Special Issues	We are hoping to meet with TeamTailor in February to discuss getting connected to their Business Intelligence module to allow more robust transfer of data and reporting. The team will need significant time for implementation.		
Cost as of Feb 16, 2024	Total Cost to Date (direct + indirect):		19,073.94
	Est Cost at Completion (E\$AC):		34,440.33
	Total Budget:		35,000.00
	Variance (Total Budget minus- E\$AC):		559.67
	Reason for Variance: Pending costs related to the implementation of a new ATS. We are still working on the integration of FRED with TeamTailor.		

Projections as of Feb 16, 2024		Dollars Projected for Month:			7,583.29
		Actual Dollars Used:			10,232.89
		Variance (Projected minus Actual):			-2,649.60
		Reason for Variance:			Delay in the start of mapping and reporting for new ATS, TeamTailor
Measures		Units at Complete	RR	HPI	
	Current Goal:				
	Goal at Completion:				
	Current Actual:				
	Estimate at Complete:				
	Variance:				
Other Measures	x				

Project Name	(TSME24 MSMS Working Group (425197)) TSME24 MSMS Working Group (425197) (On Track)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 15,000.00	Indirect Budget: 0.00	Total Budget: 15,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Kelly A Chatain		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	To be determined		
SRO Project Period	07/2023 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
=====			
Report Period	Jan, 2024 (TSME24 MSMS Working Group)		Initiation
Risk Level	On Track		
Monthly Updates	Kelly Chatain worked on MSMS Onboarding Initiative.		
Special Issues			
Cost as of Feb 16, 2024	Total Cost to Date (direct + indirect):		1,998.02
	Est Cost at Completion (E\$AC):		8,890.92
	Total Budget:		15,000.00
	Variance (Total Budget minus- E\$AC):		6,109.08
	Reason for Variance:		No hours charged.
Projections as of Feb 16, 2024	Dollars Projected for Month:		1,378.58
	Actual Dollars Used:		60.92
	Variance (Projected minus Actual):		1,317.66
	Reason for Variance:		No work scheduled.

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

Other Measures

Project Name	(TSME24 QC Systems (483249)) TSME24 QC Systems (483249) (On Track)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 49,500.00	Indirect Budget: 0.00	Total Budget: 49,500.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Sarah Elisa Broumand		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	To be defined		
SRO Project Period	07/2023 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
=====			
Report Period	Jan, 2024 (TSME24 QC Systems (483249))		Implementing
Risk Level	On Track		
Monthly Updates	Most of the work was put on hold as we wait for TSG to define direction of some updates of the Olive software. Cheng Zhou has started to troubleshoot small issues to help him learn the code and serve as a back up. The remaining hours are mostly attending meetings.		
Special Issues			
Cost as of Feb 16, 2024	Total Cost to Date (direct + indirect):		18,074.09
	Est Cost at Completion (E\$AC):		44,248.33
	Total Budget:		49,500.00
	Variance (Total Budget minus- E\$AC):		5,251.67
	Reason for Variance: Some tasks have been put on hold, hours will be pushed forward.		
Projections as of Feb 16, 2024	Dollars Projected for Month:		10,497.11
	Actual Dollars Used:		6,001.84
	Variance (Projected minus Actual):		4,495.27
	Reason for Variance: Some tasks have been put on hold, hours will be pushed forward.		

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

Other Measures

Project Name	(TSME24 SRO System Maintenance - General (483910)) TSME24 SRO System Maintenance - General (483910) (On Track)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 1.00	Indirect Budget: 0.00	Total Budget: 1.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Jeffrey L Smith		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	Pending input from Manager		
SRO Project Period	07/2023 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div>Pre Production Start:Pretest Start:Pretest End:Recruitment Start:Staffing Complete:GIT Start:SS Train Start:SS Train End:DC Start:DC End:</div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Jan, 2024 (TSME24 SRO System Maintenance - General (483910))		Implementing
Risk Level	On Track		
Monthly Updates	New laptops evaluation (help with tech issue) Adding SurveyTrak supplemental apps code to Git PB/ST Meetings (this time includes time for Marsha, Pam, Ashwin, Jeff and Holly) SurveyTrak spec model (Google doc version)		
Special Issues	No issues		
Cost as of Jan 01, 2024	Total Cost to Date (direct + indirect):	17,844.24	
	Est Cost at Completion (E\$AC):	25,810.23	
	Total Budget:	1.00	
	Variance (Total Budget minus- E\$AC):	-5,819.24	
	Reason for Variance:	See below	
Projections as of Jan 01, 2024	Dollars Projected for Month:	1,593.20	
	Actual Dollars Used:	1,190.85	
	Variance (Projected minus Actual):	-402.35	
	Reason for Variance:	See below	

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

Other Measures

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

Report Period	Jan, 2024 (TSME24 SSL Autoscheduler interface development (423463) (On Track))		Implementing
Risk Level	On Track		
Monthly Updates	We are on track to start an excel prototype of the interface in the next few weeks with a R Shiny application to follow after that test.		
Special Issues			
Cost as of Jan 19, 2024	Total Cost to Date (direct + indirect):	0.00	
	Est Cost at Completion (E\$AC):	0.00	
	Total Budget:	1.00	
	Variance (Total Budget minus- E\$AC):	0.00	
	Reason for Variance:		
Projections as of Jan 19, 2024	Dollars Projected for Month:	0.00	
	Actual Dollars Used:	0.00	

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

Project Name	(TSME24 STrak: Migration to SQL Anywhere V17 () TSME24 STrak: Migration to SQL Anywhere V17 (483227) (Some Concerns)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 10.00	Indirect Budget: 0.00	Total Budget: 10.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Lawrence Daher		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	To be defined		
SRO Project Period	07/2023 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Jan, 2024 (TSME24 STrak: Migration to SQL Anywhere V17 (483227) (Some Concerns))		Initiation
Risk Level	Some Concerns		
Monthly Updates	Created and began testing full database backup procedure. Created incremental backup procedure. began work on creating a reporting database.		
Special Issues			
Cost as of Feb 13, 2024	Total Cost to Date (direct + indirect):	3,262.37	
	Est Cost at Completion (E\$AC):	17,044.05	
	Total Budget:	10.00	
	Variance (Total Budget minus- E\$AC):	12,955.95	
	Reason for Variance:		
Projections as of Feb 13, 2024	Dollars Projected for Month:	2,756.34	
	Actual Dollars Used:	488.48	
	Variance (Projected minus Actual):	2,267.86	
	Reason for Variance:		

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

Other Measures
