Survey Research Operations

Monthly Project Report

Sponsored Data Collection Projects and Development Initiative

November 2023

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

(CCS) Community College Survey

(DCUS) Daily Cannabis Use Study

(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 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

(QoL & Hearing Loss) Quality-of-Life for Amish Children with Hearing Loss

(SAME) Skills Assessments Mode Evaluation Study

(SCA 2023) Surveys of Consumer Attitudes

(SRS 2021) Social Relations 2023

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

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

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

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

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

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

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

Sponsored Projects Dashboard

NonArchived Sponsored Projects

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

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

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

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

Report Period	Nov, 2023 (ANES 2024)	Implementing
Risk Level	On Track	
Monthly Updates	We stopped the in-person interviews at the beginning of November. We conducted 151 in-person interviews. 92 (61%) of the completed in-person interviews have scheduled an appointment for the video interview, with 53 completed video interviews (58%). Dave H. from the ANES project staff gave an update at their board meeting in Austin, TX in November. Findings seem to have been well received. We will be looking at the data in more detail as part of a paper on video interviewing and for an abstract that was submitted to next year's AAPOR annual conference. We will take the information from the pilot and incorporate any necessary changes to the design moving forward. One big possible change proposed (independently) by Andrew and the PI (to Dave) was to offer video to everyone at the conclusion of the pre-election survey rather than to a random subset.	
Special Issues		

Cost as of Dec 19, 2023	*Total Cost to Date (direct + indirect):*			181,938.86
	Est Cost at Completion (E$AC):			211,775.34
	Total Budget:			7,024,812.00
	Variance (Total Budget minus- E$AC):			123.66
	Reason for Variance:			
Projections as of Dec 19, 2023	*Dollars Projected for Month:*			58,282.07
	Actual Dollars Used:			41,992.29
	Variance (Projected minus Actual):			16,289.79
	Reason for Variance:	Unused hours, less travel, and unspent respondent payments.		

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	200/160		
	Goal at Completion:			
	Current Actual:	151/53		
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	**(BFY) Baby's First Years (On Track)**
Project Mode	Primary: Face to Face Total of Modes: 1
Project Type	Sponsored Projects
Budget	**Direct Budget**: 5,843,681.00 **Indirect Budget:** 1,994,180.73 **Total Budget:** 7,837,861.73
Principal 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	University of Michigan Survey Research Center (U-M SRC) is contracted to recruit and interview participants for Baby's First Years -- a longitudinal randomized control trial study.

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

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

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

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

Recruitment/Baseline: 04/01/2018 - 03/31/2019
       Wave 1: 04/01/2019 - 03/31/2020
       Wave 2: 04/01/2020 - 03/31/2021
       Wave 3: 04/01/2021 - 03/31/2022 |
SRO Project Period	10/2017 - 12/2020
Data Col Period	04/2018 - 12/2020
Security Plan	NA

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

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

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

Report Period	Nov, 2023 (BFY)	Implementing
Risk Level	On Track	
Monthly Updates	BFY Age 5- 8:	

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

We were able to re-contact 70% (80% in some clusters) after the Age 4 visits. Respondents harder to re-contact report having issues with the Lab communication protocols during Age 4 and being under the assumption the study is done. PIs are sending a data collection update / newsletter to address this issue.

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

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

Age 5 Staffing:

We continue to retain the BFY Age 3 staff.

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

Technical system:
Due to MSMS programming bottleneck BFY has not been able to implement the desired system changes to run the midwave process. We are currently resorting to manual sample management until programers free up. However, this had also reduced some of our operationg cost.

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

Special Issues		
Cost as of Dec 16, 2023	*Total Cost to Date (direct + indirect):*	7,552,688.07
	Est Cost at Completion (E$AC):	8,641,070.74
	Total Budget:	7,837,861.73

	Variance (Total Budget minus- E$AC):				-803,209.01
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	Reason for Variance:	Total budget is $8,700,361 (which will be updated after adding new award) with a positive variance of +$59K.			
Projections as of Dec 16, 2023	Dollars Projected for Month:				11,361.87
	Actual Dollars Used:				20,466.36
	Variance (Projected minus Actual):				-9,104.49
	Reason for Variance:	Monthly projections need to be updated to better reflect the current scope but we net an overall underrun.			
Measures		Units at Complete	RR	HPI	
	Current Goal:	n/a	n/a	n/a	
	Goal at Completion:	n/a	n/a	n/a	
	Current Actual:	n/a	n/a	n/a	
	Estimate at Complete:	n/a	n/a	n/a	
	Variance:				
Other Measures					

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

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

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

Report Period	Nov, 2023 (BHM Library Project)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Pilot 1 launched. As of Dec. 18, we have a 15% response rate after emailed invitation and three reminder emails. PI would like to send a mailed invitation after the first of the year before we close out the pilot. Putting those plans in place, will be about 500 libraries to mail. PI was able to hire research assistant to complete the lookups of emails. This person is calling the libraries to get the email addresses.	
Special Issues	Response is low. However, with no incentive and only emailed invitations/reminders, this might be what we can expect from libraries. Will still serve to plan for next pilot and national phase.	
Cost as of Dec 16, 2023	*Total Cost to Date (direct + indirect):*	45,606.46
	Est Cost at Completion (E$AC):	190,764.06
	Total Budget:	197,671.00
	Variance (Total Budget minus- E$AC):	6,906.94
	Reason for Variance:	Still early in the project as only first of two pilots is underway.

Projections as of Dec 16, 2023	**Dollars Projected for Month:**			18,847.49
	Actual Dollars Used:			9,627.65
	Variance (Projected minus Actual):			9,219.84
	Reason for Variance:	Overprojected hours.		

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:		30%	
	Goal at Completion:		30%	
	Current Actual:		15%	
	Estimate at Complete:		18%	
	Variance:			

Other Measures

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

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

Other Project Team Members	HRS Budget Analyst: Rick Krause Data Manager: Ed Green, Jennie Williams Programmer: Ashwin Dey Project Assistant: Melissa Luker
Other Project Name	CAMS
Sample Mgmt System	SurveyTrak
Data Col Tool	SAQ
Hardware	Paper and Pencil
DE Software	Other (HRS study staff is responsible for)
QC Recording Tool	N/A
Incentive	Yes, R; Yes, Other (Spouse)
Administration	SRO Group
Payment Type	Check, prepaid ($25 to main R and $10 to spouse R)
Payment Method	Check through STrak RPay System

Report Period	Nov, 2023 (CAMS 2023)	Implementing
Risk Level	On Track	
Monthly Updates	During the month of November, the team worked on logging, shipping, and providing sample and pull lists for the November 15 and Dec 4 reminder mailings. 1. 1st questionnaire mailing dropped on October 4. Subsequent mailings went out November 1, November 15, and December 4. There are no further scheduled mailings. 2. Due to slower mail times and the Thanksgiving holiday, we pushed the final questionnaire mailing to December 4 from November 29 to reduce chance of mailing another questionnaire to respondents who have completed the questionnaire. All received SAQs were logged prior to this mailing. 2. Logging issues smoothed out by the end of November with the addition of a Manpower temp assigned by the SSL to log for CAMS. Note The consistent hours and focus primarily on CAMS has had a positive impact on logging progress and cut down on the need for constant retraining and corrections. 3. 3,772 CAMS lines have been finalized of which 3,295 have completed the questionnaire. The current response rate is 52%. 4. Approximately 3,500 SAQs to Duplicating for scanning as of 12/19.	

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.	
Cost as of Dec 16, 2023	*Total Cost to Date (direct + indirect):*	322,660.18
	Est Cost at Completion (E$AC):	393,223.40
	Total Budget:	473,136.00
	Variance (Total Budget minus- E$AC):	79,912.60
	Reason for Variance:	The variance is primarily due to staff assigned to the project compared to budgeted resources. The difference between the September and October variance: CASIC and Field Ops Recharges did not get charged in November.
Projections as of Dec 16, 2023	*Dollars Projected for Month:*	18,513.69
	Actual Dollars Used:	10,823.17
	Variance (Projected minus Actual):	7,690.52
	Reason for Variance:	October CASIC and Field Ops Recharges and Rpay voids expected to hit in November will hit in December. Future projections updated.

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

Other Measures

Project Name	(Care & Help Study) Caregiving, Complex Family and Kinship Ties, and Alzheimer's Disease and Related Dementias (ADRD) (On Track)			
Project Mode	Primary: Focus Group Secondary: Cognitive IW Total of Modes: 2			
Project Type	Sponsored Projects			
Budget	**Direct Budget**: 25,219.00	**Indirect Budget:** 2,017.00		**Total Budget:** 27,236.00
Principal Investigator/Clients	Sarah E. Patterson (University of Michigan - Survey Research Center)			
Funding Agency				
IRB	*HUM#:* HUM00237431			**Period of Approval:** 7/6/2023-7/31/2024
Project Team	*Project Lead:* Margaret Lee Hudson			
	Budget Analyst:			
	Production Manager:			
	Senior Project Advisor: Lisa S Holland			
	Production Manager 1:			
	Production Manager 2:			
Proposal #	no data			
Description	Family and unpaid caregivers can influence the health and well-being of older adults through the care they provide and attitudes they hold about that care. However, the range of caregivers may extend beyond those most often captured in surveys (i.e. partners or adult children). Disadvantages may be especially present for older adults who have Alzheimer's Disease and Related Dementia (ADRD) who require more intensive and persistent care over time, and thusly rely on a more extended network of caregivers. This project seeks to enhance our understanding of diverse family and unpaid caregiver experiences and how this process may differ for those caring for an older adult living with dementia. This project will conduct focus groups with two groups of caregivers who help someone with memory issues, with 8 to 10 participants each.			
SRO Project Period	07/2023 - 07/2024			
Data Col Period	07/2023 - 07/2024			
Security Plan	NA			

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

Other Project Team Members	Focus group phase (7/23-10/23): Margaret Hudson Cog IW phase (1/24-6/24): Margaret Hudson, TBD
Other Project Name	
Sample Mgmt System	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, R
Administration	SRO Group
Payment Type	Cash, post ($60 focus groups; $50 cognitive interview)
Payment Method	Imprest Cash Fund from ISR Business Office

Report Period	Nov, 2023 (Care & Help Study)	Implementing
Risk Level	On Track	
Monthly Updates	Minimal work done on the project this month as we are anticipating cognitive interviews to begin in early 2024. Additional funding was awarded to add 4 new focus groups, which will be completed in late January/early February 2024. Margaret reached out to Shonda about identifying a resource to assist with cognitive interviews March-May 2024. No resource has been identified.	
Special Issues		
Cost as of Dec 16, 2023	*Total Cost to Date (direct + indirect):*	2,533.65
	Est Cost at Completion (E$AC):	22,653.33

	Total Budget:			27,236.00
	Variance (Total Budget minus- E$AC):			4,582.67
	Reason for Variance:			
Projections as of Dec 16, 2023	Dollars Projected for Month:			236.53
	Actual Dollars Used:			108.26
	Variance (Projected minus Actual):			128.27
	Reason for Variance:	Minimal work this month		

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

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

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

Payment Method	Check through other system (UM)

Report Period	Nov, 2023 (CARE SALTOS MTEC)	Implementing
Risk Level	Some Concerns	
Monthly Updates	1. Project Management: -Production stopped 11/3 due a system issue regarding Respondent consents. The PI Kinesiology staff submitted an ORIO to the IRB. At the end of November production had still not resumed - The PIs agreed to a retention bonus for the Interviewers for the weeks out of production. There is some concern that we may not be able to make the intermediate goal SRO set for 04/30/2024 of 7500 first interviews. Including the work in DCP2 on 11/30 we were at 4301 first interviews. The SRO team is strategizing how to boost production using Interviewer challenges and also closely monitoring productivity. We may also extend data collection for DCP3 a month to end May 31, 2024. -SRO continued to work with the PI team to find solutions to resolve International TOA issues. -SRO continue to work with Datalys and QG to tackle issues/bugs that reported from the interviewers. This has serious implications on affecting HPI of the field. -In addition, SRO has been working with Datalys and QG to resolve consent issue, which caused production pause currently. -The management team worked with the PM to find ways to increase productivity. 2. CARE SMS system: -The SRO team was an integral part of the testing of he system fixes for the consent issue -SRO continued to work with QG alongside with the PI team and Datalys on resolving ongoing technical issues. -SRO started to receive data and run the bi-weekly reports after the UM campus wide internet outage incident. 3. Questionnaire Development –N/A 4. Production: as of 11/30/2023 (Total Released samples = 13425 (DCP3) Total Completed Iws = 995 (RR = 7.4%) -Web = 988 -CATI = 7 5. Hiring and Training -Hiring on hold since we have no way to gauge the effort of Interviewers since production stopped for a month. 6. DMSS: - dashboard reports are now running daily	

Special Issues		
Cost as of Nov 30, 2023	*Total Cost to Date (direct + indirect):*	1,610,204.49
	Est Cost at Completion (E$AC):	4,686,190.45
	Total Budget:	4,685,914.00
	Variance (Total Budget minus- E$AC):	-276.45
	Reason for Variance:	The budget is for the next two years (ending 2026). We have been monitoring closely through each production waves. We will continue to adjust the overrun accordingly.
Projections as of Nov 30, 2023	*Dollars Projected for Month:*	147,500.43
	Actual Dollars Used:	140,872.31
	Variance (Projected minus Actual):	6,628.12
	Reason for Variance:	Less work for Interviewers than projected with the stop in production.

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

Project Name	**(CCS) Community College Survey (Some Concerns)**		
Project Mode	Primary: Web　　Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 560,774.00	**Indirect Budget:** 84,115.00	**Total Budget:** 644,889.00
Principal	Hana Lahr (Teachers College, Columbia University)		
Investigator/Clients	Veronica Minaya (Teachers College, Columbia University)		
	Rachel Baker (University of Pennsylvania)		
Funding Agency	Ascendium Education Group		
IRB	*HUM#:* 00237400		*Period of Approval:*
Project Team	*Project Lead:* Jeffrey Albrecht Jr		
	Budget Analyst: William Lokers		
	Production Manager:		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1: Rebecca Loomis		
	Production Manager 2: Steven Sonoras		
Proposal #	no data		
Description	The CCS seeks to understand factors that influence first year community college students in their program choice. We will survey a selection of students entering a community college for the first time in the fall of 2023 and then follow up with them in the second semester (Spring 2024) and their third semester (Fall 2024). The researchers will recruit 4 community colleges to participate.		
SRO Project Period	01/2023 - 03/2025		
Data Col Period	10/2023 - 11/2024		
Security Plan	NA		

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

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

Report Period	Nov, 2023 (CCS)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Data Preparation Ed prepared raw datasets with flags for the PIs to review. Once they make decisions on which cases to keep, Ed will prepare the final concatenated dataset. IRB The PIs are working on the Wave 2 IRB amendment. Jeff provided respondent outreach messages, plans and materials for responsive survey design experiments, and consent form drafts based on current recommendations from HHS and NIH. The PIs plan to submit the amendment in mid-January, about 8 weeks before they propose to start collecting data. Survey Programming Marsha has mostly programmed the study survey. We have received the Spanish translation, which is now under review by SpanTran.	

Web SMS Setup
Hueichun provided a shell Web SMS for CCS. Jeff reviewed and requested functionalities, which Hueichun will set up when she has time (probably in February).

Gift Card Activation Statuses
HSIP provided the final file listing gift card activation statuses of respondents. 43% have not activated their cards. The PIs requested the file, and we are in the process of transferring it to them.

Reminder Calling
The PIs are skeptical that calling respondents will improve response rates and are considering reducing or cutting reminder calls. Jeff informed the PIs about the extensive evidence suggesting that reminder calling is an effective way to improve response rates in general and also with recent high school graduates on MTF (who are comparable to the community college sample). Thus, he is recommending at least some calling. Recognizing that Wave 1 considerably exceeded scope and actual costs, he recommends reducing the effort to one call per respondent, which could save around $20,000.

Pre-Payment
The researchers are discussing using funds from their award to offer a $5 prepayment for Wave 2 that will be sent with a newsletter in the new year. If sending the pre-payment to all completed sample respondents, the bill would be roughly $25,000. Grant has offered to not charge his time to the project through March in order to offset the cost by roughly $1,000, which would cover the pre-payments for the ~300 respondents who have written in to SRO for help with their gift cards.

One way to reduce costs would be to send the pre-payment only to a subset of respondents, which would mean we could experimentally test the effects of pre-payments on this group and differentiate between those who did/did not activate their Wave 1 gift cards. If the pre-payments have a significant positive effect on completions (and resources permit), then we could consider offering comparable prepayments to all respondents in Wave 3. The researchers are considering this option.

Unpaid TOAs
4,250 students completed the program choice survey. In order to receive a gift card, students need to provide a physical address that can be associated with the payment per IRS regulations. Upon reviewing the survey data, Jeff found that 193 students completed all of the survey except for the address section and therefore have not been sent gift cards. These respondents may have found the information to be too sensitive to share, been confused by the survey setup, didn't care to receive the TOA, or didn't understand the address requirement for the gift card. While students have the right not to respond to any questions that they don't want to, we want to ensure that nobody misses the opportunity to receive a gift card due to confusion about the survey or the address requirement and so would like to reach out to them to give them another opportunity to provide that information. Alternatively, it might be possible to get a waiver of the address requirement for the TOA for these 193 respondents, which Jeff is exploring with IRB.

Special Issues	The main concerns right now are determining when to launch Wave 2 data collection and whether to continue as planned with reminder calling. Jeff has conveyed the urgency of these items to the PIs, which they hope to have decided by the end of this week before the winter break.		
Cost as of Dec 19, 2023	*Total Cost to Date (direct + indirect):*		277,991.89
	Est Cost at Completion (E$AC):		679,249.72
	Total Budget:		644,889.00
	Variance (Total Budget minus- E$AC):		-34,360.72
	Reason for Variance:	Wave 1 exceeded scope, including over $10,000 in additional respondent payments to non-sample respondents, additional data management effort needed due to decision to use anonymous links, managing incentives and incentive inquiries, following-up on PI requests, e.g., texting respondents. Jeff is updating effort projections for data management and project support in 2024.	
Projections as of Dec 19, 2023	*Dollars Projected for Month:*		59,241.88
	Actual Dollars Used:		54,188.32
	Variance (Projected minus Actual):		5,053.56
	Reason for Variance:	In November, we had lower than projected Web SMS and survey programming and project management effort. These are not concerns, because the PIs are aiming to delay Wave 2 data collection from mid-February to mid-March.	

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

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

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

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

Report Period	Nov, 2023 (DCUS)	Closing
Risk Level	On Track	
Monthly Updates	November activities: Follow-up with PIs concerning data delivery. Discussion with SPA about closing activities. Refunding remaining Tango money. Creating presentation for final project review.	
Special Issues		
Cost as of Dec 08, 2023	*Total Cost to Date (direct + indirect):*	32,964.98
	Est Cost at Completion (E$AC):	33,409.54

	Total Budget:	49,742.00
	Variance (Total Budget minus- E$AC):	16,332.46
	Reason for Variance:	Differences in between proposed and projected scope: 1- Project management was budgeted at the survey director level, but I'll be leading the project and I was billed a survey specialist Intermediate. 2- I'm programming all of these instruments myself, so programming hours based on specification are lower. 3- Work scope for data management is limited, so projections have been reduced in line with this scope.
Projections as of Dec 08, 2023	Dollars Projected for Month:	375.99
	Actual Dollars Used:	155.39
	Variance (Projected minus Actual):	0.00
	Reason for Variance:	188 dollars in incentive refunds have not yet been returned to the project.

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

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

The purpose of this study is to explore how the program affects multiple dimensions of recipients' lives. Key outcomes of interest include health, subjective and material well-being, time use, financial health, labor market participation, social and civic engagement, and effects on children. SRO concluded the Baseline interviews in 2020, and the Midline interviews in July 2022. The EDC Endline project will reach out to all Baseline respondents for completion of a telephone interview, followed by an in-person interview (with cognitive tasks, anthropometric measurements and collection of dried blood spots) for those respondents still in the greater Chicago area or greater Dallas/Ft. Worth area. Data collection will take place between March 2023 and late September 2023. SRO assumes approximately 91% of the 2,990 Baseline respondents are located and willing to be interviewed again (2,720 90-minute telephone interviews).   SRO assumes that in-person interviews will be completed with 2,003 respondents still living in the greater Chicago or Dallas/Ft. Worth and Waco area. About 400 respondents are known to currently reside outside of these areas; these respondents will not be asked to complete an in-person interview. The in-person interviews will include collection of consent for administrative data collection, collection of Social Security number, completion of self-administered on-line cognitive assessments, collection of blood pressure, height, weight, and dried blood spots. We assume that 1, 957 respondents will participate in the dried blood spot collection. Following collection of the dried blood spots, SRO interviewers will package and ship the dried blood spot cards to the laboratory chosen by ORL.

• Our budget assumes up to 2,720 telephone interviews are completed and allows for at least six telephone attempts on all non-resistant cases with working telephone numbers. SRO will track and monitor contact attempts to examine the efficacy of contact windows in the first replicate of the sample.
• The budget assumes approximately 2,003 cases complete the in-person component and 1,957 consent to the DBS collection.
• Mileage costs for fieldwork are budgeted at 2,003 trips of no more than 120 miles per round trip.
• Cash incentives of $15,000 are included in the budget estimate to facilitate in-person payments to reluctant and hard-to-reach participants and individuals who are asked to assist in the location of these participants. All other participant incentive payments are the responsibility of Open.
• Supplies/kits for DBS are included in the estimate consistent with our most recent project experience. Further discussion with the University of Washington laboratory may result in the refinement of the materials and method for drying the bio specimens and associated costs of project supplies.
SRO will conduct standard data cleaning and produce a preliminary and final dataset with documentation. Standard data cleaning does not include customization (such as derived variable or index creation, dataset merging, sample weighting, recoding, or coding of other-specify responses). We will ensure that all components of a case are present with a reference variable (SID, OID) to allow for merging and data analysis. Our main documentation is conveyed through data dictionaries and a questionnaire codebook.

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

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

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

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

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

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Report Period	Nov, 2023 (EDC-Endline)	Closing
Risk Level	On Track	
Monthly Updates	Only a few data mrg hours and admin asst were charged this past month.	
Special Issues	None	
Cost as of Dec 16, 2023	*Total Cost to Date (direct + indirect):*	1,202,054.63
	Est Cost at Completion (E$AC):	1,202,054.63
	Total Budget:	3,097,511.00
	Variance (Total Budget minus- E$AC):	1,895,456.37
	Reason for Variance: See previous months' reports - revised workscope.	
Projections as of Dec 16, 2023	*Dollars Projected for Month:*	586.56
	Actual Dollars Used:	1,213.17
	Variance (Projected minus Actual):	-626.61
	Reason for Variance: Had more admin asst hours than projected	

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:			
	Goal at Completion:			
	Current Actual:		96%	
	Estimate at Complete:		96%	
	Variance:			

Other Measures

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

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

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

Report Period	Nov, 2023 (HCAP 2022) Implementing
Risk Level	On Track
Monthly Updates	The final HCAP iw was completed on 12/9. We extended into December in order to attempt to reach Informants for the Rs who were completed up to 11/30. We ended production with 5,841 iws (3,071R & 2,770 Inf). We exceeded the RR goal by 2.8% overall. The overall RR goal was 68% and we ended with an overall RR of 70.8%. The R goal was 72% and we ended with 74.4%, and the Inf goal was 64% and we ended with 67.1%. We were in production for 71 weeks, the same as 2016. We were originally scheduled to end production after week 58, but we extended so that we would have time beyond the completion of HRS, and to give us time to meet goals. We exceeded the proxy interview goal of 25% and ended with a 29% proxy RR (73 total iws). 426 Spanish interviews were completed (252 R, 174 Inf). All sample is finalized and we have discontinued the running of the reports and dashboard. Of the 20 Falsified/Suspected to be falsified (1 R, 19 Infs):

-7 were successfully interviewed
-2 were originally refusals and Iwer falsified data, so were recoded as refusals
-4 additional refusals
-6 were unsuccessful attempts and were final coded out as non-interviews
-1 was retained as a 1001 because there was a faint R voice in the background with responses consistent with what we saw in Blaise – we suspect this iw was completed over the phone and the Iwer said it was FTF so that she could keep the TOA.

An additional 6 were verified that either had suspect recordings or had no recording:
-3 were found to be falsified and were reinterviewed
-2 were successfully verified and stayed 1001s
-1 was kept as a 1001 due to faint R voice in background whose responses were consistent with Blaise

All data entry has been completed. We are pursuing Iw test materials for a handful that we have no record of receiving, and hope to have those to enter before the end of December. 22 of 28 Iwers have shipped their Iw'ing materials back to Ann Arbor and we expect the remaining 6 by the end of this week.

We are finalizing documentation for all HCAP process and protocols. The Final report should be complete by the end of this month other than the final cost report. The management team debrief will be held 12/19/23.

The HCAP accounts will expire on 12/31 so shortcodes will no longer be available. The PI has some remaining data questions that we will continue to work on into January and are currently exploring options for charging.

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	*Total Cost to Date (direct + indirect):*	4,420,287.89
	Est Cost at Completion (E$AC):	4,701,473.30
	Total Budget:	4,488,000.00
	Variance (Total Budget minus- E$AC):	-213,473.30
	Reason for Variance:	There was a budget cap in 2020 while goals remained at high level, project has stretched 2 additional years with low level of management, inflation since budget created in 2018. The PI has approved a direct cost overrun of $190,000.
Projections as of	*Dollars Projected for Month:*	242,770.10
	Actual Dollars Used:	213,865.81
	Variance (Projected minus Actual):	28,904.29
	Reason for Variance:	Staff hours and travel hours were higher than projected due to last minute trips to boost production.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	5641	68	4.8
	Goal at Completion:	5641	68	4.8
	Current Actual:	5841	70.8	4.87
	Estimate at Complete:	5841	70.8	4.87
	Variance:	+200	+2.4%	+.07
Other Measures	Iw counts include R + Inf. Final RR for Rs is expected to be 70% and final Inf RR to be 64% (67% overall).			

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

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

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	Nov, 2023 (Health and Well Being in SE MI)	Implementing
Risk Level	Attention!	
Monthly Updates	The D-AMP project continues to fall well behind budgeted production estimates in all areas.	

As of Dec 18, the D-AMP project has collected only 75 main interviews and 50 informant interviews in six months of data collection. D-AMP was budgeted as a 10-month data collection and should be completing about 90 main interviews and 90 informant interviews per month (so we should have close to 585 main interviews, and 585 informant interviews for the same time frame). Hours per interview and hours per screener are far higher than budgeted. As of Dec 18, the field team had finalized 1,850 out of 4,598 screening lines released to the field. (Panel cases have not yet been released). Hours per interview and hours per screener remain significantly higher than budgeted (overall 47 HPI).

The project had been getting close to the required number of interviewer hours (despite significant attrition), however the hours worked have not producing completed interviews. Hours charged to D-AMP fell in November

due to work on a SRS sample release. Eligibility through November was far lower than budgeted (10% compared to the budget of 17%), and respondents have been extremely resistant to participating.   DMSS re-drew the remaining sample and selected only areas with >50% MENA population. This has *dramatically* improved eligibility (39% for this release although the n is small), however the PIs are now concerned with representativeness of the sample (since the new sample only includes Dearborn, Dearborn Heights, and a bit of Detroit). This will be discussed in an upcoming meeting.

The project may need to recruit and hire additional MENA interviewers due to attrition.

We still face the issue of very resistant respondents. The PIs have one temporary employee who is attempting refusal conversion on resistant lines. This person has had some success. In early December the PIs engaged three "community influencers". SRO participated in training the community influencers. They will also attempt to persuade sample persons to participate in the study. These three employees are engaged under consultant agreements, and have all signed ISR's Pledge of Confidentiality and undergone a modified interviewer PEERRs training.

We continue to keep the dire financial situation of the project front and center for the PIs. We have managed to extend the data collection by about three months, however we will not able to come close to the budgeted number of interviews. The PIs have also not made a decision about releasing panel sample.

We received approval for both English & Arabic concerns letters for D-AMP in early December and have begun to employ those in our field protocol. We still do not have an Arabic brochure – translations and IRB approval are pending. We have advised the LCD team to beef up their internet presence and translate the D-AMP web page.

Special Issues	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. We have asked the PIs for input on how much panel sample to release, given the very low prospects for new sample cases on D-AMP. This was very clearly stated as the PIs must decide whether they want to prioritize new sample cases over panel sample cases, given the fixed budget available, and the fact that we will not be able to meet the study's goals for number of cases. The PIs have not responded to two inquiries about the panel sample. Prior to the Mid-East conflict, the interviewing team was encountering extreme respondent resistance to the project that is impacting interviewer morale. HPI/HPS are far higher than budgeted and production is extremely low. The interview length is roughly 40 minutes longer than budgeted. The additional length of the interview appears to be related to the age of the respondents. About 62% of the interviews require Arabic, compared to 35% estimated.

Cost as of Dec 16, 2023		
	Total Cost to Date (direct + indirect):	2,218,913.28
	Est Cost at Completion (E$AC):	3,756,418.88
	Total Budget:	3,758,127.00
	Variance (Total Budget minus- E$AC):	1,708.12
	Reason for Variance:	We expect that the full project budget will be used, given the very high HPI and low production on the project. We are not projecting an overrun - we are assuming that the work scope will be reduced to match the budget.

Projections as of Dec 16, 2023		
	Dollars Projected for Month:	164,233.57
	Actual Dollars Used:	143,634.34
	Variance (Projected minus Actual):	20,599.23
	Reason for Variance:	Respondent cooperation is extremely low, and interviewers put in very low effort over the Thanksgiving holiday. We had projected that we would release new sample in February (with higher eligibility), however this did not happen due to several delays. Low production has resulted in lower than anticipated respondent payments, interviewer travel, and survey tech effort. We are modifying projections to accommodate the low level of production and travel and trying to project what the project can afford with the funding remaining. This is a work in progress.

Measures		Units at Complete	RR	HPI
	Current Goal:	930 main, 930 inf	60% scr, 74% main	10.38 w/screening
	Goal at Completion:			
	Current Actual:	75 main, 50 inf	30% scr, 36.6% main	47.0 HPI w/screening
	Estimate at Complete:			
	Variance:			

Other Measures	About 2/3 of the budgeted sample has been released. RR shown above are for the released sample. Budgeted at 140 minutes, the D-AMP average interview length is 162 minutes. Saliva participation rate is roughly 80% compared to 80% budgeted.

Project Name	(HRS 2022 Panel & Baselines) Health and Retirement Study 2022 Main Interviews (Some Concerns)		
Project Mode	Primary: Mixed Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 13,982,815.00	**Indirect Budget:** 5,033,815.00	**Total Budget:** 19,016,630.00
Principal	David Weir (ISR-SRC)		
Investigator/Clients			
Funding Agency			
IRB	**HUM#:** HUM000611128		**Period of Approval:** 6/7/2023-6/6/2024
Project Team	**Project Lead:** Evanthia Leissou		
	Budget Analyst: Richard Warren Krause		
	Production Manager: Andrea Sims		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Jennifer C Arrieta		
	Production Manager 2: Theresa Camelo		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.		
SRO Project Period	01/2021 - 12/2023		
Data Col Period	03/2022 - 08/2023		
Security Plan	NA		

Milestones			
Milestones	**Pre Production Start:** 01/01/2021		**Pretest Start:** 11/01/2021
	Pretest End: 11/23/2021		**Recruitment Start:** 08/01/2021
	Staffing Complete: 01/15/2022		**GIT Start:** 02/21/2021
	SS Train Start: 02/23/2022		**SS Train End:** 03/03/2022
	DC Start: 03/07/2022		**DC End:** 12/21/2024

Other Project Team Members	Derek Dubuque (Production Manager), Alex Warju (Production Manager), Milagros Hierro (Production Manager), Deborah Zivan (Project Manager), Andrew Hupp (Project Manager), Gary Hein (Project Manager), Erin McSpadden (Project Manager), Daniah Buageila (Project Manager), Janet McBride (Project Assistant), Paul Burton (Stats/Sampling), Vanessa Clarke (Project Assistant), Jeannie Baker (Project Manager), Melissa Luker (Project Assistant), Anthony Romanowski (Project Manager), Megan Hromco (Project Assistant). Kristen Cross (Project Assistant), Austin De Spirito (Project Assistant), Cindy Huang (Budget Analyst), Andria Goedert (Project Assistant), Dominic Bonanni (Project Assistant)

Tech Team: Karl Dinkelmann, Jeff Smith, Jim Rodgers, Laura Yoder, Marsha Skoman, Ashwin Dey, Pam Swanson, David Bolt, Deb Wilson, Jennie Williams, Rose Zybdel, Stephanie Windisch, Holly Ackerman, Shane Empie, Kelly Chatain, Brianna Sabol

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

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

logging, weekly mailings (SSA and SAQ), payment and letter request processing, and preparing for a baseline end game protocol.

3. Baseline production has been slow since Panel ended (averaging 45 baseline iws per week). Interviewers continue to work significantly less hours than committed. Field managers continue to work with interviewers who are not meeting expectations.

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

6. Different scenarios for goals and associated costs are being drafted for Dr. Weir's review.

7. Based on the propensity model run in September, there are 3,051 baseline cases that have ever been flagged priority of which 387 (13%) have completed an interview. Newly generated baselines from screening continue to be flagged on a weekly basis.

*The "measures" table reflects both Panel and Baseline combined as of 12/19

Special Issues	- Did not meet the Panel response rate goal of 74% even with the additional five months of field time and responsive design strategies due to interviewer count and balancing effort with new cohort screening/baseline iws. - Slow progress with baseline interviewing. - Multiple Blaise issues that have impacted STrak and MSMS throughout data collection. - Competing project team demands with HRS 2022 in data collection at the same time as 2023 mail surveys and HRS 2024 preproduction. -High field staff attrition rate. Burden on staff with additional recruitment and training efforts while managing production. - Concerns about slow progress in completing baseline interviews now that panel is done and in meeting baseline interview goals for early data release (interviews completed through 12/31/23).
Cost as of Dec 16, 2023	**Total Cost to Date (direct + indirect):** 18,092,415.66
	Est Cost at Completion (E$AC): 18,058,415.66
	Total Budget: 19,016,630.00
	Variance (Total Budget minus- E$AC): 958,214.34
	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 Dec 16, 2023	**Dollars Projected for Month:** -154,255.97
	Actual Dollars Used: -151,851.79
	Variance (Projected minus Actual): -2,404.18
	Reason for Variance: Fewer panel sample check voids hit in the month than originally projected. Future projections adjusted in CRS.

Measures

	Units at Complete	RR	HPI
Current Goal:	17,051	56%	11.2
Goal at Completion:	23,468	46%	7.9
Current Actual:	17,073	56%	11.2
Estimate at Complete:	22,186	44%	9.9
Variance:	1,282	2%	2.0

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: 25.2% (2,149 completed) from baselines spawned from screener as of 12/18/23.

2019 EGenX baselines: Goal RR: 70%, Current RR: 72.5%

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

Milestones	***Pre Production Start:*** 05/15/2023	***Pretest Start:*** 01/29/2024
	Pretest End: 02/11/2024	***Recruitment Start:*** 12/19/2023
	Staffing Complete:	***GIT Start:***
	SS Train Start:	***SS Train End:***
	DC Start:	***DC End:*** 05/31/2025

Other Project Team Members	Alex Warju (Production Manager), Gary Hein (Project Manager), Erin McSpadden (Project Manager), Daniah Buageila (Project Manager), Janet McBride (Project Assistant), Paul Burton (Stats/Sampling), Vanessa Clarke (Project Assistant), Jeannie Baker (Project Manager), Melissa Luker (Project Assistant), Anthony Romanowski (Project Manager), Megan Hromco (Project Assistant), Austin De Spirito (Project Assistant), Cindy Huang (Budget Analyst), Dominic Bonanni (Project Assistant) Tech Team: Karl Dinkelmann, Jeff Smith, Jim Rodgers, Laura Yoder, Marsha Skoman, Ashwin Dey, Pam Swanson, David Bolt, Deb Wilson, Jennie Williams, Rose Zybdel, Stephanie Windisch, Holly Ackerman, Shane Empie, Kelly Chatain, Brianna Sabol, Kelly Lieske
Other Project Name	HRS 2024 Panel
Sample Mgmt System	SurveyTrak; MSMS
Data Col Tool	Blaise 5; SAQ
Hardware	Laptop; [UM cell] Phone; Paper and Pencil
DE Software	Other (Blaise 5 Coding Application); External vendor (DataForce)
QC Recording Tool	Camtasia
Incentive	Yes, R; Yes, INF
Administration	NA
Payment Type	Check, prepaid (100.00, $20 SSA); Check, post ($50 (WBD), $20 (SAQ))
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office

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Report Period	Nov, 2023 (HRS 2024)	Planning
Risk Level	On Track	
Monthly Updates	HRS 2024 preproduction activities continued with focus cost projections, technical specifications, technical development, testing, pretest training material and bulk mailing preparations, and pretest interviewer recruitment. Pretest training location and dates: Ypsi Marriott 1/27-1/28. Production training TBD: April/May 2024 *Milestone dates are tentative.	

Special Issues	-Resource (Field Staff) concerns for HRS 2024 preproduction and production while HRS 2022 data collection. The plan is to recruit @80 interviewers for start of 2024 production and, as 2022 interviewers finish screening/baseline work, transition them over to 2024. -Session database issues needing to be addressed/resolved by CBS for HRS 2024. The beta version delivered in November is working well with SurveyTrak but not with MSMS. The Tech team is working with CBS to try to address the additional issues before the final build is released in December. The December 2023 build release allows for a very short time to test before need to sign off on systems for HRS pretest in early January.

Cost as of Dec 16, 2023	Total Cost to Date (direct + indirect):		210,146.87
	Est Cost at Completion (E$AC):		806,131.80
	Total Budget:		821,421.00
	Variance (Total Budget minus- E$AC):		15,289.20
	Reason for Variance:	Variance sine last month due to savings related to training costs related to staffing 14 field interviewers rather than the budgeted 25 interviewers. Extending the length of pretest data collection to account for the lower interviewer count. Projections in CRS are for pre-production and pretest data collection. Will update the total budget once the 6 year renewal proposal is reviewed/approved/awarded.	

Projections as of Dec 16, 2023	Dollars Projected for Month:		77,096.87
	Actual Dollars Used:		63,579.26
	Variance (Projected minus Actual):		13,517.61
	Reason for Variance:	Variance primarily due to staff hours. Future projections have been adjusted.	

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

Other Measures

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

Report Period	Nov, 2023 (HRS HOC)	Planning
Risk Level	Some Concerns	
Monthly Updates	During the month of November, - Jeannie participated in and scheduled meetings with the PI and budget analyst. - Team resumed bi-weekly meetings. - Due to disappointing NIOCCS matches, HRS is looking for 2 "ballpark" quotes for additional coding work: 1994-2002 waves (i.e., the ones that only have 1980 codes) - 25,434 And the 1994-2008 waves (i.e., the ones that only have 1980 or 2000 codes, but not the newest 2010 codes) - 41,089 -Budget for additional work is still under consideration and not submitted to HRS yet. Additional cases may be added for 1993 if HRS is able to recover the data. Michael Nolte continues to work on this, however, he has been offline for the better part of December due to part time status. -Work was not transferred to SSL as anticipated in December. Timing of coding starting is dependent on final decisions to workscope changes.	

Special Issues	- Work load for SSL Coding may significantly increase.			
	- PI with the most coding experience/knowledge left the organization shortly after start of project			
	- SRO's staff member with the most HRS coding experience/knowledge informed project team in mid-January that he will be retiring the first week of February allowing for a very short transition of knowledge to the newly assigned coding lead.			
	-Preliminary NIOCCS results are disappointing which may result in more SRO coding than originally anticipated. Will assess impact to budget and timeline once have final counts from HRS staff and HRS approves the cost estimate.			
	-Part time status of Michael Nolte affects completion of work			

Cost as of Dec 16, 2023	Total Cost to Date (direct + indirect):		23,274.32
	Est Cost at Completion (E$AC):		86,747.26
	Total Budget:		92,157.06
	Variance (Total Budget minus- E$AC):		5,409.80
	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 Dec 16, 2023	Dollars Projected for Month:		4,590.31
	Actual Dollars Used:		971.05
	Variance (Projected minus Actual):		3,619.26
	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 January 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	David Weir (SRC)
Investigator/Clients	Helen Levy (SRC)
	Ken Langa (SRC)
Funding Agency	
IRB	*HUM#:* *Period of Approval:*
Project Team	*Project Lead:* Evanthia Leissou
	Budget Analyst: Richard Warren Krause
	Production Manager:
	Senior Project Advisor: Nicole G Kirgis
	Production Manager 1: Andrew L Hupp
	Production Manager 2: Theresa Camelo
Proposal #	no data
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample.
SRO Project Period	02/2021 - 08/2024
Data Col Period	03/2022 - 06/2024
Security Plan	NA

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

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

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Report Period	Nov, 2023 (HRS2022-Screening)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Screening is going at a steady pace as the focus has been on baseline production. Goals have been updated to reflect the priority of interviewers work in the field (baseline high priority, baseline endgame, screening endgame, and screening) and the effort (hours) the interviewers are actually providing. The first part of Release 6 (n=6,332) were released to the web and to the field on 12/15. The remainder Release 6 (n=9,313) will be released to the web on 12/22.	
	We have release 6,511 cases to the endgame protocol. 512 cases (7.9%) of cases have completed a screener. 51 cases (10%) completed via the web, and 461 (90%) of cases completed in-person. Another 596 cases have been flagged and will be sent their endgame letter this week.	
	SRO and sampling team have been working together on the sample design. The sampling team has ordered additional information from MSG. They will prepare the additional 896 reserve segments in early January. Those 896 segments have been broken into 6 replicates. We begin sorting addresses (and possibly listing) in the first few	

replicates in late January. We'll know how many more segments we might need as cases from earlier batches are finalized and we seen the screening eligibility, and baseline completion statistics. We have identified a small set of Ann Arbor and field resources that can start this work when it's ready.

Special Issues

Cost as of Dec 15, 2023	*Total Cost to Date (direct + indirect):*		17,662,004.99
	Est Cost at Completion (E$AC):		26,506,528.12
	Total Budget:		28,919,242.00
	Variance (Total Budget minus- E$AC):		2,412,713.88
	Reason for Variance:	HRS 2022 New Cohort's projections decreased ~ $1.2 million total cost compared to our report from last month. This is due to the updated interviewer weekly projections, which have been adjusted to reflect the actual average number of hours worked each week. Interviewers have not been working as many hours per week as we had hoped. We are sending a cost scenario to you and David that would add more interviewers and extend data collection to help achieve goals	
Projections as of Dec 15, 2023	*Dollars Projected for Month:*		1,117,778.63
	Actual Dollars Used:		1,057,411.26
	Variance (Projected minus Actual):		60,367.37
	Reason for Variance:	Unused projections have been projected as additional costs in November.	

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	3,600/1,500 HHs	73%	3.0
	Goal at Completion:			
	Current Actual:	2,832/2,827	34.9%	2.83
	Estimate at Complete:			
	Variance:			

Other Measures

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

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

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

Report Period	Nov, 2023 (IHDS3)	Implementing

Risk Level	On Track
Monthly Updates	Team continues to release data models for additional languages for HH, COMM and Migrant projects. We continue to work through some case recoveries and complete the close out activities for agencies that finished production. Making sure complete counts match data delivered.

Special Issues	Wave 3 funding balance ended at -$18,833.61 direct and indirect costs (-$12,072.53 Direct))	
Cost as of Dec 19, 2023	*Total Cost to Date (direct + indirect):*	630,207.51
	Est Cost at Completion (E$AC):	689,852.43
	Total Budget:	694,143.53
	Variance (Total Budget minus- E$AC):	4,291.10
	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 Dec 19, 2023	*Dollars Projected for Month:*	16,844.70
	Actual Dollars Used:	13,264.66
	Variance (Projected minus Actual):	3,580.04
	Reason for Variance:	Due to staffing constraints some of the allocated hours could not be used, they will be re-allocated moving forward.

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

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

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

Other Project Team Members	Gary Hein: Project Lead Cindy Tsao: Budget Analyst Ruth Philippou: Production Manager Vanessa Clarke: Project Assistant Carolyn Viera Martinez: Coding Lead
Other Project Name	LHMS Fall
Sample Mgmt System	SMS
Data Col Tool	SAQ; Other (Blaise SMS)
Hardware	Desktop; [UM cell] Phone; Paper and Pencil
DE Software	Other (Weblog)
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, prepaid ($25)
Payment Method	Check through STrak RPay System

Report Period	Nov, 2023 (LHMS 2023 Fall)	Implementing
Risk Level	On Track	
Monthly Updates	Fall LHMS activities and notable events: 1- SAQs received and logged 2- Progress reports prepared and delivered to PIs 3- SAQs shipped to DataForce for scanning 4- Reminder calling training of SSL staff	

5 -Reminder calling data collection

*Measures noted below based on data as of 12/12/23

Special Issues	- SSL resource availability for reminder calling and logging activities.
	- Budgeted goal of 54% seems high considering the sample consists of past wave non-responders and a few new spouses. The Spring LHMS, which also consisted of past wave non-responders, current response rate is 17%.

Cost as of Dec 16, 2023	*Total Cost to Date (direct + indirect):*	171,073.16
	Est Cost at Completion (E$AC):	385,610.62
	Total Budget:	505,359.00
	Variance (Total Budget minus- E$AC):	119,748.38
	Reason for Variance:	Staffing for reminder calling will not meet original projections. If calling does not stay on pace, additional staff or calling time may be added, which may reduce the variance.

Projections as of Dec 16, 2023	*Dollars Projected for Month:*	-42,010.08
	Actual Dollars Used:	-109,123.81
	Variance (Projected minus Actual):	67,113.73
	Reason for Variance:	Dataforce invoice did not hit CRS in November as projected. Future projections updated in CRS.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:			N/A
	Goal at Completion:	2063	54%	N/A
	Current Actual:	463	12%	N/A
	Estimate at Complete:	600	16%	N/A
	Variance:	1463	38%	N/A

Other Measures	N/A

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

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

Other Project Team Members	Gary Hein: Project Lead Cindy Tsao: Budget Analyst Vanessa Clarke: Project Assistant Carolyn Viera Martinez: Coding Lead
Other Project Name	LHMS Spring
Sample Mgmt System	SMS
Data Col Tool	SAQ; Other (Blaise SMS)
Hardware	Desktop; [UM cell] Phone; Paper and Pencil
DE Software	Other (Weblog)
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, prepaid ($25)
Payment Method	Check through STrak RPay System

Report Period	Nov, 2023 (LHMS 2023 Spring)	Implementing
Risk Level	On Track	
Monthly Updates	October Activities and Notable Events: 1 -Logging of returned SAQs 2- Weekly progress reports created and delivered to project stakeholders 3- Data delivery of completed scanned SAQs to PIs 4. 350 respondents have returned a completed a questionnaire (17% RR)	

Special Issues	None			
Cost as of Dec 16, 2023	*Total Cost to Date (direct + indirect):*			240,083.53
	Est Cost at Completion (E$AC):			269,505.14
	Total Budget:			457,922.00
	Variance (Total Budget minus- E$AC):			188,416.86
	Reason for Variance:	Actual sample of 1,950 is lower than budgeted sample of 2,288, resulting in generally lower costs across all resources. In addition, the budgeted response rate was 54% but actual response rate is much lower as the respondents are non-responders from past waves of LHMS.		
Projections as of Dec 16, 2023	*Dollars Projected for Month:*			31,049.12
	Actual Dollars Used:			4,809.05
	Variance (Projected minus Actual):			26,240.07
	Reason for Variance:	Dataforce invoice did not hit cost reports in November as projected. Future projections adjusted.		

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	1053	54%	N/A
	Goal at Completion:	1053	54%	N/A
	Current Actual:	350	17%	N/A
	Estimate at Complete:	350	18%	N/A
	Variance:	703	36%	N/A

Other Measures	N/A

Project Name	**(MI CReSS (Year 3 & 4)) Michigan COVID-19 Recovery Surveillance Cohort Study (On Track)**
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects
Budget	**Direct Budget**: 379,112.00 **Indirect Budget:** 98,569.00 **Total Budget:** 477,681.00
Principal Investigator/Clients	
Funding Agency	MDHHS - Releases 1 - 8
IRB	**HUM#:** HUM00234617 **Period of Approval:** 6/15/2023-6/14/2028
Project Team	**Project Lead:** Timothy Prand
	Budget Analyst: William Lokers
	Production Manager: Lisa J Carn
	Senior Project Advisor: Nicole G Kirgis
	Production Manager 1: Narine Verdiyan
	Production Manager 2:
Proposal #	no data
Description	MI CReSS is a partnership between the University of Michigan School of Public Health (SPH) and the Michigan Department of Health and Human Services. It is a public health surveillance study to learn about Michiganders' experiences with COVID-19 using a representative sample of confirmed cases within the state. Using survey data, they plan to document sociodemographic inequities in COVID-19 testing, treatment, and recovery.
	SRO's involvement includes the administration of a Follow-up survey for respondents that completed a Baseline survey with the SPH team. Based on the sample information provided, we will be re-contacting approximately 3,995 respondents who have already completed (or are estimated) to complete the Baseline survey to administer the Follow-up survey.
	The Follow-up survey is estimated to be 45 minutes in length, and Respondents will be encouraged to complete the survey by web. However, SRO Interviewers will contact non-responders and conduct the interview over the telephone if the Respondents do not want to complete the survey on the web.
	HUM00181068 - Year 3 IRB Exempt - Budget:$841,375 Total used:$649,836
	HUM00234617 - Year 4 - IRB approved - Budget:$477,681
SRO Project Period	08/2021 - 09/2023
Data Col Period	01/2022 - 07/2023
Security Plan	NA

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

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

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

Risk Level	On Track

Monthly Updates	Cohort 1 - Completed in field and data has been delivered.
	Final report delivered - 12/19/2023
	
	Cohort 2 launched - Sept 14, 2023
	 - Issues
	   - Reminder email issue where date was substituted with "a few days ago" where the invite date was not included. Program fixed but there was an ORIO submitted.
	   - Discovered that if a web R started a web survey and their main language was Spanish, they saw the Spanish instrument automatically. The problem was that Spanish was not set up for the web so the R some Spanish and Some English. Program fixed but there was an ORIO submitted.
	 - Received Spanish QNR but IRB has not approved - In programming
	 - Decided to add 2 months of CATI reminder calling to releases 1 and 2. Subsequent releases may add CATI reminder calling as well but will determine the extent once we have both Arabic and Spanish released.
	 - Waiting for final approved translations for Arabic
	 - Token of Appreciation Reconciliation performed and found 2 ToAs not sent.
	 - 1 mention of the U of M data breach where respondent refused to participate because of it.

Special Issues	2 ORIOs submitted. Described in Monthly update There is a little concern if funding for Releases 9-16 will happen. More to come in January.

Cost as of Nov 20, 2023		
	Total Cost to Date (direct + indirect):	122,327.46
	Est Cost at Completion (E$AC):	459,273.07
	Total Budget:	477,681.00
	Variance (Total Budget minus- E$AC):	18,407.93
	Reason for Variance: Fewer hours billed to project than estimated/projected	

Projections as of Nov 20, 2023		
	Dollars Projected for Month:	86,330.85
	Actual Dollars Used:	76,881.06
	Variance (Projected minus Actual):	9,449.79
	Reason for Variance: Fewer hours billed to project than estimated. $8,000 line item that did not hit the budget.	

Measures		Units at Complete	RR	HPI
	Current Goal:	1103	50	3
	Goal at Completion:	2030	80%	3
	Current Actual:	1103	42.68	4.95
	Estimate at Complete:	2030	80%	5
	Variance:			2
Other Measures	Targeting 80% of eligible Rs that completed the Main survey to complete the MoCA section in CATI.			

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

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

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

Report Period	Nov, 2023 (MTF Base Year 2022_27)	Implementing
Risk Level	On Track	
Monthly Updates	November 2023 Since last month,..	

- updating training materials and agendas,
- SurveyTrak testing,
- assist as needed with school materials development and the IRB submission (amendment),
- tablets (spare devices for school) are being updated with Android updates and with some changes to the wifi manager and user interface.
- work to transition MTF to Qualtrics is on track and we have completed the first round of testing, Hueichun and Shaowei are working on required updates to the portal and WebSMS. Hueichun has also been providing support to the MTF team with some more complex functionality required in the questionnaire (panel). Our current plan for auto downloading data from Qualtrics relies on the continued use of SFTP - alternative methods are being explored.

Special Issues

Cost as of Dec 08, 2023	*Total Cost to Date (direct + indirect):*	1,788,949.21
	Est Cost at Completion (E$AC):	6,880,475.33
	Total Budget:	9,778,060.00
	Variance (Total Budget minus- E$AC):	2,897,584.67
	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 Dec 08, 2023	*Dollars Projected for Month:*	83,712.05
	Actual Dollars Used:	58,695.27
	Variance (Projected minus Actual):	25,016.78
	Reason for Variance:	We have projected $10k for computer supplies every year of the budget period - this amount is to replace tablets, purchase any new accessories etc. We did not need to replace any tablets or purchase any new equipment this year (except a few more roller bags for air travel). The remainder of the underspend was due to lower salary costs that projected. A few members of the team did not charge as many hours as projected.

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

Other Measures

Project Name	(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027 (On Track)		
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 2,496,935.00	**Indirect Budget:** 1,398,282.00	**Total Budget:** 3,895,217.00
Principal	John Schulenberg (UM-SRC)		
Investigator/Clients	Megan Patrick (UM-SRC)		
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Donnalee Ann Grey-Farquharson		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lloyd Fate Hemingway		
	Senior Project Advisor: Rebecca Gatward		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	This project is a continuation of MTF Illume Web 2021. PI staff will edit and test 12 survey versions, all previously programmed in Illume by SRO. SRO will further test the surveys as part of the systems integration process. All 12 surveys will be launched in 2021. After testing is complete, SRO will launch the 2021 Web survey data collection with an estimated sample size of 20,000 cases identified by the Principal Investigator who will deliver the contact information including e-mail address to SRO. The Web survey data collection will replace aspects of the standard mail-based data collection. Both the separately funded Winter Location calling effort and Non-Response follow-up calling will include this sample – with the calling effort being integrated with the standard MTF activities.		
SRO Project Period	01/2022 - 03/2027		
Data Col Period	04/2022 - 10/2026		
Security Plan	NA		

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

Other Project Team Members	Rebecca Gatward (SPA), Donnalee Grey-Farquharson, Lloyd Hemingway, Hueichun Peng, Shaowei Sun, Peter Sparks, Ashwin Dey, Hongyu Johnson, Minako Edgar, Brad Goodwin
Other Project Name	MTF
Sample Mgmt System	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Nov, 2023 (MTF Panel 2022-27)	Implementing
Risk Level	On Track	
Monthly Updates	1. Management - continued to work with the study team on testing Qualtrics survey in 2024 production. - worked with the study team to prepare the MFT Pilot panel testing 2. System - completed updating 2023 WSMS specification document. - Started to prepare WSMS 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 Nov 30, 2023	*Total Cost to Date (direct + indirect):*	1,209,771.54
	Est Cost at Completion (E$AC):	3,898,977.97
	Total Budget:	3,895,217.00
	Variance (Total Budget minus- E$AC):	-3,760.97
	Reason for Variance:	The total project amount includes MTF Web Illume as well as Non-Response Calling and Winter Location project. With 4 years of data collection remaining and possible unforeseen issues with transition to a new survey platform as well as potential increases in scope and costs, we will adjust the overrun throughout the next years.
Projections as of Nov 30, 2023	*Dollars Projected for Month:*	35,030.17
	Actual Dollars Used:	20,322.30
	Variance (Projected minus Actual):	14,707.87
	Reason for Variance:	The total project amount includes MTF Web Illume as well as Non-Response Calling and Winter Location project. The overrun amount is MTF Panel 2022-2027 that was the combination of MTF Panel 2017-2022 and MTF Web Illume. Project team will adjust the underrun accordingly for future months.

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

Other Measures

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

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

Other Project Team Members	Shonda Kruger-Ndiaye & Camila Kendall -- Co-Project Leads
	Raphael Nishimura -- Sampling
	Tech Team: Marsha Skoman (Tech Lead & STrak Programmer), Jude Purillo (Lead Blaise Programmer), Kelly Lieske (Programming Support), Valyn Dall (Data Manager), Jennie Williams (Data Management Support), Emmanuel Ellis (Help Desk), Cheng Zhou (Database setup), Lihshwu Ke (Database set up)
	Spanish Testing and Project Support: Liliana Grueber, Alondra Ortiz-Ortiz, Mabel Hernandez Duran (PSID Temp)
Other Project Name	
Sample Mgmt System	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop
DE Software	N/A
QC Recording Tool	Camtasia
Incentive	Yes, R; Yes, INF
Administration	Other (ETI (Puerto Rican Survey Firm))
Payment Type	Check, post (Varies by study phase); Cash, post (Varies by study phase)
Payment Method	Other (Via ETI Systems)

Report Period	Nov, 2023 (PR-PSID)	Initiation
Risk Level	Some Concerns	
Monthly Updates	SRO finalized the pretest training dates and booked all travel accommodations. Project co-leads will travel with an experienced PSID TL/PC that is bilingual. Pretest training will be 1/29-2/2.	
	SRO trained 7 ETI interviewers and staff on sample recruitment. ETI will recruit 100 families for the pretest sample. ETI is aiming to finish recruitment by 12/22, but final deadline is 1/15. As of 12/19, 109 recruitment surveys have been completed.	
	PIs did not end up submitting the NIA proposal -- they may submit in Spring of 2024.	

ETI received DRI equipment. Awaiting ghost image to start loading laptops. SRO planning to deliver the ghost image in late Dec.

Blaise and SurveyTrak testing are on-going. Blaise testers are close to signing off on the Spanish instrument -- aiming to sign off on instrument for training in mid-December. Tech & Management teams decided that we do not need a Prod Data test before the pretest.

SRO continues to make progress in training material development. Prioritizing finalizing materials by early January, to allow for enough time for translation.

SRO will begin meeting with the PIs and Core project team to develop a plan for integrating the PR-PSID instrument with the Core 2025 instrument in December.

Special Issues	Timeline concerns -- Timeline contingent on: training materials development and translation and systems testing. Slight overrun. Much of the Post Collection Processing that is planned is new for SRO.			
Cost as of Dec 16, 2023	*Total Cost to Date (direct + indirect):*			495,157.91
	Est Cost at Completion (E$AC):			1,342,814.91
	Total Budget:			1,292,585.00
	Variance (Total Budget minus- E$AC):			-50,229.91
	Reason for Variance:	Projected cost to complete increased by ~$600 between Oct & Nov. Biggest driver was adding management hours to support the pretest training.		
Projections as of Dec 16, 2023	*Dollars Projected for Month:*			42,543.67
	Actual Dollars Used:			30,141.06
	Variance (Projected minus Actual):			12,402.61
	Reason for Variance:	Actuals in tech categories 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 Investigator/Clients	Narayan Sastry (SRC)
Funding Agency	
IRB	**HUM#:** HUM00166316 **Period of Approval:**
Project Team	**Project Lead:** Piotr Dworak
	Budget Analyst: Ivanna Iavorska-Em
	Production Manager: Sarah Crane
	Senior Project Advisor: Stephanie A Chardoul
	Production Manager 1:
	Production Manager 2:
Proposal #	no data
Description	A 2023 wave of the Childhood Development Supplement (CDS) is going to be conducted in two phases. Phase 1: from September 2023 – May 2024 and Phase 2: from June 2024 - January 2025. The sample for CDS is comprised of the PSID-eligible children (ages 0 -17) from the Core 2023 families we interview and their primary caregivers. Approximately 3,700 families will be included, with some Core families containing several CDS children. As part of the CDS Phase 1, families are asked to complete phone coverscreen and PCG interviews followed by mixed Adolescent 12 - 17 phone/web interview (including an IVR component in phone mode). In Phase 2 families will be visited in person (where possible) and asked to complete Child 8 - 11 interviews (via Video if out of area), provide physical measurements, educational assessments, saliva collection, time diaries, school and birth record linkage forms. CDS interviewing will be conducted by a mix of SSL and Field interviewers. Coverscreen and PCG interviews will be handled by SurveyTrak and Blaise 4.8, Adolescent interviews will be handled by MSMS and Blaise 5.
SRO Project Period	08/2022 - 01/2025
Data Col Period	09/2023 - 01/2025
Security Plan	NA

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

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

Report Period	Nov, 2023 (PSID CDS 2023)	Initiation
Risk Level	On Track	
Monthly Updates	CDS is in the final phase of preparations for the January launch. We will be training TLs on 1/16 - 17 and interviewers 1/18 - 1/24. First batch of invite letters is scheduled for 1/23 or thereabouts. Testing preparation focuses on: - ST community (CS, PCG interviews). All final specs delivered / instruments delivered / final testing continues. - MSMS community (adolescent interviews). All final specs delivered / instruments delivered / testing continues. - Scheduler system. Testing continues. Key areas of concern: - IVR: We received IVR survey later than expected and testing started on 12/14 (2 weeks later than expected). We are also workign on approval of using Enghouse as a vendor for human subject data collection. UM procurement	

requested a high liability cap to which Enghouse did not agree. Signing a data protection agreement is contingent on negotiating a cap which will be acceptable to U-M and Enghouse. In prior conversation, it seemed that a specific cap might not be necessary but recently the position of procurement and the SRC Director's office is that without the cap, the data protection agreement cannot be signed.

Training and Staffing:
- 4 TLs, 2 PCs invited to in-person TL/TTT 1/14 - 1/16
- 50 Iwers (down from 54 but no concerns) iwers trained remotely 1/18 - 1/24

Sample release:
Release 1 = 2341 cases
- 38 Spanish
- 469 RingFence / PHone Only
- ~ 600 overlap with TAS but most have likely completed TAS by now

IRB
- Prod submission amendment approved 12/7
- Spanish amendment going in early next week (crossing-fingers and checking on the translation progress)

Special Issues	Tech systems: CDS tech development was ceding programming time to allow for TAS and Core Saliva launches.			
Cost as of	**Total Cost to Date (direct + indirect):**			0.00
	Est Cost at Completion (E$AC):			0.00
	Total Budget:			0.20
	Variance (Total Budget minus- E$AC):			0.00
	Reason for Variance:	CDS received funding, grant, and shortcode and in November we transfered costs from contingency to the new account. We are also working to delvier a new proposal just for the Phase 1 ... at this time estimated to cost around $3.3M.		
Projections as of	**Dollars Projected for Month:**			0.00
	Actual Dollars Used:			0.00
	Variance (Projected minus Actual):			0.00
	Reason for Variance:	November monthly cost was difficult to analyze because transfered contingency showed up in that month. However, our total cost and review of staffing and non-salary costs line by line showed costs are following expected projections.		

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

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

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

Other Project Team Members	PSID Suite SRO Lead - Shonda Kruger-Ndiaye; TSG Tech Leads - Jim Rodgers, Laura Yoder, and Jeff Smith; Data Manager - Rose Zybel; Blaise Programmer - Youhong Liu; Portal - Jude Perillo MSMS Programmers - Pam Swanson and Darnell Christian; Help Desk Support - Kyle Goodman; Testing Coordinator - Camila Kendall; Project/Production Support - Jaime Koopman, Sarah Crane, & Xiomara Lorenzo-Guerra; Reporting - Piotr Dworak
Other Project Name	
Sample Mgmt System	MSMS
Data Col Tool	Blaise 5
Hardware	Laptop; Desktop; [UM cell] Phone
DE Software	NA
QC Recording Tool	Camtasia
Incentive	Yes, R; Yes, INF
Administration	SRO Group
Payment Type	Check, post ($75); Other (ePay)
Payment Method	Check through other system (PSID RAPS); Other (ePay)

Report Period	Nov, 2023 (PSID TAS 2023)	Implementing
Risk Level	On Track	
Monthly Updates	Summary of November Activities Staffing and Training -No interviewer attrition from the October training. - Weekly TL training to ensure the team has the skills needed in reporting and data collection systems. - Training 1 interviewers received Non-Response calling training on 11/27. This protocol will begin on 12/4. - Training preparations continue to bring on an additional 23 interviewers. GIT training takes place on December 1. Study specific training takes place, in person, from December 4 through December 6. Four additional hours of training was added to training to account for 20 new hires and additional protocols (non-response calling) the project is completing.	

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

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

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

Special Issues				
Cost as of Dec 16, 2023	**Total Cost to Date (direct + indirect):**			425,301.97
	Est Cost at Completion (E$AC):			1,385,548.46
	Total Budget:			1,457,428.00
	Variance (Total Budget minus- E$AC):			71,879.54
	Reason for Variance:		Data collection scope in the process of being finalized. Allocations will be updated based on PI requests and final project specifications.	
Projections as of Dec 16, 2023	**Dollars Projected for Month:**			123,180.40
	Actual Dollars Used:			98,608.81
	Variance (Projected minus Actual):			24,571.59
	Reason for Variance:		Actuals in tech and management were lower than projections.	

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:			
	Goal at Completion:		89%	
	Current Actual:	580	54.9%	.6
	Estimate at Complete:			3.7
	Variance:			

Other Measures

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

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

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

Report Period	Nov, 2023 (PSID23)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Summary of November 2023 Activities Forthcoming		
Special Issues	Unable to staff as many on-staff interviewer hours as budgeted -- many shared agreements. Need more new hires than anticipated, which has a sizable negative impact on the budget and proposes a risk to data collection. Interview aspects of the project taking more effort than anticipated, which has led to less effort being spent on the saliva portion of the project. Spanish interviewing and saliva data collection (including FTF visits) starting later than originally planned.		
Cost as of Dec 18, 2023	*Total Cost to Date (direct + indirect):*		4,183,085.91
	Est Cost at Completion (E$AC):		6,142,787.17
	Total Budget:		6,235,802.00
	Variance (Total Budget minus- E$AC):		93,014.83
	Reason for Variance:	November CRS complete - review of variance forthcoming. 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 Dec 18, 2023	*Dollars Projected for Month:*		541,029.94
	Actual Dollars Used:		443,052.20
	Variance (Projected minus Actual):		97,977.74
	Reason for Variance:	November CRS complete - review of variance forthcoming. 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:	7809	74%	5.5
	Estimate at Complete:	8956	85%	5.73
	Variance:	690	4%	0.85

Other Measures	Notes for Measures Above:
	From Dashboard through 12/2/23. Units Completed = 7809 iws (1861 CATI--24%, 5948 web--76%). Sample Invited = 10,788. BUDGET ASSUMPTIONS: Mode of completion: 60% web & 40% CATI; Of the web completes, 38% do not require any interviewer effort. HPI: 5.42 = CATI completes; 7.21 = web completes w/ interviewer follow-up; 10.17 = non-sample/non-iw. Additional 1.74 HPI for FTF NRFU cases.

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

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

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

Report Period	Nov, 2023 (QoL & Hearing Loss)	Closing
Risk Level	On Track	
Monthly Updates	Based on the October 31 conversation with the research team, Margaret Hudson revised the questionnaire to be used with families of younger children (age 2-6) and provided some basic guidance on implementing the paper-and-pencil questionnaire. The audiology team plans to pilot the questionnaire at the December 6, 2023 community clinic. Minimal additional consultation is expected after the clinic and the effort is expected to wrap up in early 2025.	
Special Issues		
Cost as of	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	8,200.00
	Variance (Total Budget minus- E$AC):	0.00
	Reason for Variance:	
Projections as of	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	0.00
	Variance (Projected minus Actual):	0.00
	Reason for Variance:	

Measures

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

Other Measures

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

Other Measures

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

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

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

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

Monthly Updates	Project Management:
	- Provide weekly updates and concerns to the SRO Admin team.
	- Continued to closely monitor the costs and adjust projections with the financial analyst.
	- Transferred ownership of the survey tablets to CDS team at ISR.
	-Delivered the WJ Scoring report and the crosswalk file for the scoring to the PI
	- Wrapping up final data files for the delivery in December.

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

Interviewer Hiring & Training
- Done with collecting Interviewer Debriefing Notes for the data delivery

Production: Completed production successfully on 10/19/2023

Hardware:
- received 7 out of 8 WJ easels from the interviewers.

- Other: PM is working with DCS to prepare field staff closeout activities.

Special Issues

Cost as of Nov 30, 2023	*Total Cost to Date (direct + indirect):*	293,382.01
	Est Cost at Completion (E$AC):	298,109.08
	Total Budget:	302,327.00
	Variance (Total Budget minus- E$AC):	4,217.92
	Reason for Variance:	The underrun amount was caused by readjusting the estimated projections across the board to Dec 2023 since we will extend the production period. The biggest driver of the underrun was mainly due to a decrease in the respondents/subjects non-salary category as well as some non-salary expenses that have not been reflected in November. The underrun amount will be adjusted in December 2023.
Projections as of Nov 30, 2023	*Dollars Projected for Month:*	15,537.19
	Actual Dollars Used:	14,397.84
	Variance (Projected minus Actual):	1,139.35
	Reason for Variance:	The small amount of underrun was mainly due to a decrease in the respondents/subjects non-salary category as well as some non-salary expenses have not been reflected in November. The underrun amount will be adjusted in December 2023.

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

Other Measures

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

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

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

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Report Period	Nov, 2023 (SCA 2023)	Implementing
Risk Level	On Track	
Monthly Updates	SCA November 2023 began as scheduled on MON 10/23 and ended as scheduled on SUN 11/19 (both earlier than the usual monthly start and end dates, due to Thanksgiving holiday). We completed 600 interviews in the NOV study month (328/172/100) meeting the overall IW goals. Due to an ongoing struggle to complete RECON6 interviews the usual goals of 320/180/100 were modified (with the input of the PIs) to allow for additional RDD interviews to be completed to make up for the anticipated, and in the end actual, RECON6 shortfall. HPI for the month was 3.65 (higher than the budgeted 3.2). Despite the higher than buidgeted HPI for the month we continue to project an underrun for the CY 2023.	
Special Issues		
Cost as of Dec 16, 2023	*Total Cost to Date (direct + indirect):*	1,158,683.03
	Est Cost at Completion (E$AC):	1,269,803.18
	Total Budget:	1,332,352.00

	Variance (Total Budget minus- E$AC):			62,548.82
	Reason for Variance:	Overall lower than budgeted HPI for the CY 2023.		
Projections as of Dec 16, 2023	**Dollars Projected for Month:**			126,352.46
	Actual Dollars Used:			131,942.20
	Variance (Projected minus Actual):			-5,589.74
	Reason for Variance:	An increased need for dialing hours required the offering of several incentives to encourage ST and IWers to add hours resulting in a lower projected underrun than had been projected in OCT.		

Measures		Units at Complete	RR	HPI
	Current Goal:	600		3.2
	Goal at Completion:	600		3.2
	Current Actual:			
	Estimate at Complete:	600		3.65
	Variance:			.45

Other Measures

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

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

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

Report Period	Nov, 2023 (SRS 2021)	Implementing
Risk Level	Attention!	
Monthly Updates	The Social Relations Study continues to be well behind schedule in terms of completing screeners and cases. Hours per screener are far higher than were budgeted, and the project continues to be hampered by attrition, resulting in far fewer interviewer hours than needed to support the level of production needed. We have mentioned the need for additional interviewers to the PIs multiple times, however they have not yet shown willingness to move forward with this. Eight experienced interviewers were trained and added to the DAWN projects in early December (4 travelers, 4 local). We hope that the interviewers will help improve efficiency in the project overall, but realize that they won't fully address the deficit in interviewer hours. We have mentioned the need for more interviewers to the PIs several times, however they have not yet agreed to move forward with this. As of 12/18/2023, the project has only completed 502 interviews, compared to roughly 2152 expected interviews for the same time period. The project has finalized 1849 screener lines compared to roughly 3660 expected for the same time period. The production deficit is related to having fewer interviewers than needed, and higher hours per	

screen than budgeted. The interview length is 130 minutes (compared to 140 budgeted) and saliva cooperation is around 84% (slightly higher than budgeted).

Screening continues to be very difficult, with some areas being very hostile to minority interviewers (or to any interviewers). We reprinted respondent materials for SRS so that no Arabic is shown, in response to objections from households. We finally received IRB approval for most field materials in early December, and are in the process of printing and shipping items to interviewers.

We presented the financial and production status to the PIs in September and again in early November, and were (and continue to be) very clear that the project is in extreme financial trouble, and they will not achieve the budgeted number of interviews. We have been working collaboratively with the PIs to attempt to develop protocol modifications to improve field data collection (however we have been clear that this will not recover lost time or money). We are discussing ideas that came out of the November 17 SDG meeting to see what would be worth implementing to improve production.

So far we have implemented call limits on screening, increased the token of appreciation, and deployed concerns letters that were finally approved in November. Interviewers reported that there was more interest now that the token has been increased, and it does look like overall HPI (including screening) has come down by about 10 hours per interview since the new sample (and higher token) were released.

| Special Issues | | | 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. This has been communicated to the PIs in weekly meetings as well as in the monthly written reports. We have asked the PIs for input on how much panel sample to release, given the lower expected number of newly-screened sample cases. They have not responded to two inquiries about releasing panel sample. |
| | | | The interviewing team is encountering resistance to screening. We cannot send minority interviewers to some areas, and even non-minority interviewers are experiencing hostility. We are strongly considering the use of a web-screener to help with this, however we realize that there will be a heavy cost for programming and testing. |

Cost as of Dec 16, 2023	Total Cost to Date (direct + indirect):		1,984,732.21
	Est Cost at Completion (E$AC):		5,870,566.56
	Total Budget:		5,876,610.11
	Variance (Total Budget minus- E$AC):		6,043.55
	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 Dec 16, 2023	Dollars Projected for Month:		382,697.72
	Actual Dollars Used:		228,195.47
	Variance (Projected minus Actual):		154,502.25
	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 continue to adjust projections to be more in line with production expectations and the lower number of interviews expected.	

Measures		Units at Complete	RR	HPI
	Current Goal:	3644	88% scr, 75% main	10.4 with screening
	Goal at Completion:			
	Current Actual:	502	29% scr, 48% main	20.5 with screening
	Estimate at Complete:			
	Variance:			
Other Measures	RR shown above reflect completion based on the released sample. Current length 130 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 (Some Concerns)		
Project Mode	Primary: Qualitative Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 57,655.00	**Indirect Budget:** 32,287.00	**Total Budget:** 89,942.00
Principal	James Wagner (University of Michigan - Survey Research Center)		
Investigator/Clients	Ronald Kessler (Harvard Medical School)		
Funding Agency	Department of Veterans Affairs to Harvard Medical School; University of Michigan Institute for Social Research subcontract agreement with the Harvard Medical School for performance of its assigned tasks		
IRB	**HUM#:** HUM00235584		**Period of Approval:** 6/7/2023 - 6/6/2024
Project Team	**Project Lead:** Margaret Lee Hudson		
	Budget Analyst: William Lokers		
	Production Manager: Derek Dubuque		
	Senior Project Advisor: Lisa S Holland		
	Production Manager 1: Meredith A House		
	Production Manager 2:		
Proposal #	no data		
Description	The STARRS-LS collaboration with VA HEARTH (Housing Employment Assessment Risk Transitions Help) Qualitative Interviews is part of a larger project led by STARRS site principal investigator, Dr. Ron Kessler, at the Harvard Medical School (HMS). The Army Study to Assess Risk and Resilience in Servicemembers (STARRS) is a long-term prospective study (funded so far for close to 15 years) of risk and protective factors for suicidal behaviors among US Army soldiers and, in recent years, Veterans who were soldiers at the beginning of the study. One line of research in STARRS has been the development of machine learning models using information obtained while soldiers were still on active duty to predict homelessness after becoming a Veteran. The HMS STARRS team developed successful models of this sort and published the results. These publications came to the attention of VHA leadership, who approached the HMS STARRS team to establish a collaboration to use these models to target recently separated Veterans for intensive transitional services interventions designed to prevent homelessness. As part of the larger project, the HMS STARRS team will be updating the risk prediction models to be created based on a short set of self-report questions that could be embedded into a participant intake form. This intake form can then be used by VA HEARTH social workers in new samples of transitioning service members (TSMs) (not the STARRS-LS respondents) to determine which TSMs are at high risk of post-separation homelessness.

The STARRS models were developed by working with a sample of approximately 15,000 STARRS survey respondents who were interviewed initially when they were on active duty and then followed and reinterviewed after they became Veterans. Several hundred of these STARRS Veterans became homeless after separation. A second aspect of the research is for 50-100 of these Veterans to be recruited to participate in a follow-up focused qualitative interview designed to elicit information about the ways VA might be able to improve transitional services for soldiers at high risk of homelessness after leaving active service and becoming Veterans. With a subcontract from HMS, the U-M Survey Research Center (SRC) Survey Research Operations (SRO) will recruit STARRS-LS respondents for the qualitative interviews, carry out the interviews, transcribe and de-identify the interviews, and link the de-identified/coded interview transcripts to existing de-identified/coded survey data files for these respondents. The HMS STARRS team will then carry out content analysis of these transcripts to elicit information that might help the VA HEARTH team further design their interventions. | | |
SRO Project Period	05/2023 - 02/2024		
Data Col Period	10/2023 - 02/2024		
Security Plan	Yes		

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

Other Project Team Members	Meredith House - STARRS LS Survey Director Margaret Hudson - Project Manager Derek Dubuque - Scheduler 4 temp research technicians hired for qualitative interviews 1 Survey Tech 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	Nov, 2023 (STARRS-LS VA HEARTH)	Implementing
Risk Level	Some Concerns	

Monthly Updates	? As of December 2, we have completed 15 interviews and had 16 broken appointments.
	• More respondents than we expected are scheduling interview appointments (~20%), but the no show rate is much higher than we had anticipated (about 50%). Where we have permission to text, we started implementing text reminders (in addition to email reminders) to respondents for their upcoming appointments.
	• We have moved to scheduling appointments over a rolling 2-week period (shortening the window respondents have to self-schedule) with the hopes that this will help more respondents keep their appointments.
	• As of December 2, 324 email invitations have been sent, with 63 people (19%) indicating interest in participating. 73% of those expressing interest have scheduled appointments and approximately half of those scheduled show up and complete interviews. Using these numbers as assumptions of future performance, we estimate completing approximately 40 interviews in total. This is below the 50-100 desired.
	• HEARTH respondents who complete interviews are emailed a $50 token of appreciation via Tango electronic gift card. We continue to process these weekly.
	? Starting in November, U-M took on the task of redacting PII from the transcripts. Removing this responsibility from the student interviewers has allowed them to focus their time on interviewing and learning the coding procedures.
	? An unexpected staffing change occurred on November 22 when Jaleesa Turner left the project. The last 1.5 weeks of the month were spent adjusting the the change and identifying gaps. Derek Dubuque was identified as the new production manager/scheduler and will begin in early December.
	? We have been working to improve communication among the team, both before and especially after the loss of Jaleesa.
	• We worked to refine processes for gathering the students' schedules and scheduling appointments so that we are maximizing the number of interviews that can be done.
	• Margaret has been meet with Jenny and/or the students weekly to strengthen communication and coordination.

Special Issues	

Cost as of Dec 16, 2023	**Total Cost to Date (direct + indirect):**	27,581.21
	Est Cost at Completion (E$AC):	69,321.46
	Total Budget:	89,942.00
	Variance (Total Budget minus- E$AC):	20,620.54
	Reason for Variance:	Fewer projected interviews projected due to slow production; this reduces respondent payments.

Projections as of Dec 16, 2023	**Dollars Projected for Month:**	14,635.42
	Actual Dollars Used:	11,119.87
	Variance (Projected minus Actual):	3,515.55
	Reason for Variance:	Fewer interviewer hours and respondent payments than projected this month

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

Other Measures	

Project Name	(STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study (On Track)
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects
Budget	**Direct Budget**: 8,262,557.60 **Indirect Budget:** 4,627,032.00 **Total Budget:** 12,889,590.00
Principal Investigator/Clients	James Wagner (University of Michigan)
	Robert Ursano (Uniformed Services University of the Health Scienc)
	Murray Stein / Ron Kessler (University of California San Diego / Harvard)
Funding Agency	Department of Defense
IRB	**HUM#:** HUM00180765 **Period of Approval:** 4/5/23 - 4/4/24
Project Team	**Project Lead:** Meredith A House
	Budget Analyst: William Lokers
	Production Manager: Ruth B Philippou
	Senior Project Advisor: Lisa S Holland
	Production Manager 1: Jeffrey Albrecht Jr
	Production Manager 2: Lisa M Lewandowski-Romps
Proposal #	no data
Description	This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.

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

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

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

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

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

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

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

Report Period	Nov, 2023 (STARRS-LS Waves 3 & 4)	Implementing
Risk Level	On Track	
Monthly Updates	Project Management and Planning:	

Project Management and Planning:
? Slides containing updates on Wave 4 were sent to USUHS for the GSC on November 6.
? We attended the semi-annual IPR on November 28.
? We sent weekly production updates to the PIs, and reported on progress on the call with the Army/M&RA.
? Meredith created the agenda/notes and facilitated the weekly meeting with the STARRS project managers.
? We carried out bi-weekly meetings with M&RA to coordinate Safety Plan and respondent locating activities.
? The Year 4 sub-award:
o Reconciliation of hours/charges that needed to be moved from the Year 3 to the Year 4 account was completed.
? Year 5 budget:
o We sent the Year 5 budget, which includes work to begin Wave 5, to USUHS on November 8. The budget assumes we start W5 preproduction April 2024 and production November 2024 (2 years after Wave 4).
? The Year 5 budget includes costs to finish Wave 4. Note that although the budget year/POP for the Year 5 budget is March 2024 - February 2025, U-M's Year 5 estimate includes March-April 2025 costs for Management, Enclave, and the last month of W4 public use, assuming there will be a 2 month no cost extension.
? The Year 5 budget also includes costs to begin Wave 5 (pre-production and 4 months of production).
? Wave 5 ballpark budget:
o We sent a ballpark budget for all of Wave 5 to Dr. Ursano on November 28. The Wave 5 ballpark includes pre-production and 4 months of production that were included in the Year 5 budget plus the rest of Wave 5 costs. Although, note that the costs for Management and Enclave are covered by the Year 5 budget through April 2025.
? IRB: There was no IRB activity in November.

? STARRS-affiliated, but not STARRS funded, work:
o VA/HEARTH project:
? As of December 2, 15 interviews had been completed and 16 more had been scheduled.
• More respondents than we expected are scheduling interview appointments (~20%), but the no show rate is much higher than we had anticipated (as many as half). Where we have permission to text, we started implementing text reminders (in addition to email reminders) to respondents for their upcoming appointments.
• HEARTH respondents who complete interviews are emailed a $50 token of appreciation via Tango electronic gift card.
? Starting in November, U-M took on the task of redacting PII from the transcripts. Removing this responsibility from the student interviewers has allowed them to focus their time on interviewing and learning the coding procedures.
? We worked to refine processes for gathering the students' schedules and scheduling appointments so that we are maximizing the number of interviews that can be done.
? Margaret met with Jenny and/or the students weekly to coordinate.
? We identified and trained additional U-M staff who can serve as facilitators for the Zoom interview calls and capture the transcripts and recordings. This will give us flexibility as we move into the holiday period.

Enclave and User Support:
? Annual DoD security training:
o Renewal instructions and training materials were distributed to all UM-STARRS Data Enclave analysts on November 30. Completed trainings are due by the end of January.
? Annual IA security review:
o An initial call with M&RA, AAG, and U-M was scheduled for December 4.
o M&RA indicated they will start planning for an end of January in-person visit in early December.
? 2023 repeat NDI search:
o We carried out adjudication of duplicate records and CDC-identified "true death" cases that have a possibility of not being deaths. We are planning late January 2024 for release.
? Sharing STARRS-LS data with UK COVID Global Mental Health Consortium for COVID research: We participated in discussions about this sharing agreement and the PIs agreed to move forward. After a DUA is in place, the U-M Enclave data transfer memo process should be followed and all PIs will need to approve the transfer.
? Standard Enclave activities continued. These include maintaining security requirements; processing background checks and Great Lakes Cluster (GLC) user access requests, drop box requests, ID swap and data transfer requests; managing software acquisition and updates; and providing user support as needed. Of particular note this month:
o Work continued on configuration of a new Windows database server to replace the primary Enclave server that reached end of life in the fall. Additional support was purchased to ensure ongoing protection/support while the final configuration continues.
o The Enclave team installed R packages, 'interactions' and 'maq', on Enclave servers.
o The Enclave onboarding process was completed for three new Harvard analysts.
o We tracked progress on DUAs for two new VA fellows so they may obtain Enclave access. The DUAs were under review with the VA.
? Biomarker group request for assistance in November:
o We completed a transfer of biomarker data from GLC to the Enclave.

Public Use Data:
? The September quarterly ICPSR user report was sent to USUHS for M&RA/the GSC on November 6.
? We assisted a USUHS researcher who was having long-term problems getting a response from his POC at ICPSR regarding updating their DUA for accessing the STARRS data on the VDE. We reached out to our ICPSR contact to request help with remedying the situation.
? Biosample flags, administrative variables, and inventory document:
o Draft documentation of biosample flag and administrative data variable descriptions was shared with Dr. Stein and Harvard and they provided feedback.
o We are targeting June 1 for the biosample flags and administrative data to be completed. The inventory

document will follow.
? We awaited decisions from the Army/GSC on producing the genetic and bioassay files for public use and placing data in the NIH National Data Archive and Public use release for GWAS.

Wave 4 Production Updates:
? Wave 4 production statistics, as of December 1, 2023, are as follows:
o Replicates released: 12 of 14 released with 12,807 sample lines.
o Completed interviews: 8,537 (8,036 web; 501 phone).
o Replicate 10 ended production on December 1 with a final response rate of 75.5%, meeting the wave average.
? Replicate 10 surpassed Replicate 9 as the most productive replicate thus far in Wave 4 for our interviewers, who completed 62 interviews (3 more than in Replicate 9).
? Two additional days of production (calling and web survey open) had been added to Replicate 10 to recuperate some of the effort lost to Veterans Day and Thanksgiving.
o During the month, Replicate 11 transitioned from Phase 2 to Phase 3. As of December 1, the response rate was 49.5%; it had been closely following the trajectory of replicate 10 until it dipped a bit, we think due to the Thanksgiving holiday.
o Replicate 12 was released on Monday, November 27 with letters mailed to 1,102 participants. As of December 1, we had received 14 completed surveys and the response rate was 1.3%.
o The response rate for completed replicates (Reps 1-10) is 75.5%.

Safety Plan Results:
? The Wave 4 Safety Plan rate is 12.3% as of December 1.

Special Issues	No changes this month to the areas of risk and mitigation strategies.		
Cost as of Oct 31, 2023	*Total Cost to Date (direct + indirect):*		9,370,128.09
	Est Cost at Completion (E$AC):		12,597,405.90
	Total Budget:		12,889,590.00
	Variance (Total Budget minus- E$AC):		292,184.10
	Reason for Variance:	After making projections updates, the final October cost report projected underrun is $292,184. Updates included adjustments to Enclave non-salary and Public Use projections after reviewing actuals and adding in some recharges from October that didn't get posted due to rate approval delays. November's projections include both October and November for Mobile Device Recharge, Field Ops, and CASIC. Note this projected underrun is before adding in the costs for starting Wave 5.	
Projections as of Oct 31, 2023	*Dollars Projected for Month:*		347,460.65
	Actual Dollars Used:		318,473.28
	Variance (Projected minus Actual):		28,987.37
	Reason for Variance:	Underspending in October was largely in ICPSR research salaries which were projected to hit a month later than they did.	

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	10,800	75	10.2
	Goal at Completion:	10,800	75	10.2
	Current Actual:	8,537	75.5 (Reps 1-10)	12.1
	Estimate at Complete:	10,800	75	11
	Variance:	0	0	0.8
Other Measures				

Developmental/Initiative Projects Dashboard

NonArchived Development Initiative and No-DataCol Projects

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

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

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

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

Report Period	Nov, 2023 (TSME24 DCO System Support (483248))	Implementing
Risk Level	Some Concerns	
Monthly Updates	- Hueichun and Shaowei investigated the TeamTailor API library and object model (business rules behind the API) - FOTY 2024 prod test - Investigated current Fred Geocoding process as related to the employee address updates	
Special Issues		

Cost as of Dec 16, 2023	*Total Cost to Date (direct + indirect):*	7,832.43
	Est Cost at Completion (E$AC):	32,967.19
	Total Budget:	35,000.00
	Variance (Total Budget minus- E$AC):	2,032.81
	Reason for Variance: production work took priority	
Projections as of Dec 16, 2023	*Dollars Projected for Month:*	3,207.77
	Actual Dollars Used:	1,259.76
	Variance (Projected minus Actual):	0.00

	Reason for Variance:	production work took priority		
Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

	Reason for Variance:	production work took priority		
Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			

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

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

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

Report Period	Nov, 2023 (TSME24 MSMS Working	Initiation
Risk Level	On Track	
Monthly Updates	Updated the data specification template for MSMS projects. This template will be made available on the MSMS documentation website for all projects. Clarified issues with CpId attribute. Adding plain language description to all columns for project staff. Kelly updated the navigation for the MSMS documentation website.	
Special Issues		

Cost as of Dec 16, 2023	*Total Cost to Date (direct + indirect):*		1,937.10
	Est Cost at Completion (E$AC):		11,562.04
	Total Budget:		15,000.00
	Variance (Total Budget minus- E$AC):		3,437.96
	Reason for Variance:	Not charging the short code.	
Projections as of Dec 16, 2023	*Dollars Projected for Month:*		1,374.99
	Actual Dollars Used:		790.87
	Variance (Projected minus Actual):		584.12
	Reason for Variance:	Not charging the short code.	

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

Other Measures

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

Other Measures

Project Name	**(TSME24 QC Systems (483249)) TSME24 QC Systems (483249) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 49,500.00	**Indirect Budget:** 0.00	**Total Budget:** 49,500.00
Principal Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Sarah Elisa Broumand		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	To be defined		
SRO Project Period	07/2023 - 06/2024		
Data Col Period			
Security Plan	NA		

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

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

Report Period	Nov, 2023 (TSME24 QC Systems (483249))	Implementing
Risk Level	On Track	
Monthly Updates	Ran into a critical error loading cases into OLIVE that was caused due to the keystroke field length that exceeded 4000 characters. The rest of the time was spent attending meeting and adding additional features to the QC dashboard.	
Special Issues		

Cost as of Dec 16, 2023	*Total Cost to Date (direct + indirect):*		9,115.90
	Est Cost at Completion (E$AC):		47,650.84
	Total Budget:		49,500.00
	Variance (Total Budget minus- E$AC):		1,849.16
	Reason for Variance:	minimal cost variance	
Projections as of Dec 16, 2023	*Dollars Projected for Month:*		5,258.81
	Actual Dollars Used:		4,134.23
	Variance (Projected minus Actual):		1,124.58
	Reason for Variance:	Resource availability is mostly responsible to spend these dollars. Hours will be carried forward.	

Measures

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

Other Measures

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

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

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

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

Report Period	Nov, 2023 (TSME24 SSL Autoscheduler	Implementing
Risk Level	On Track	
Monthly Updates	We are still on schedule to test an interface with a 2 step process. The February schedule (process starts 1/12/24) will be done via Excel and then the March schedule (process starts 2/9/24) will tested via a webpage interface. For the project short code, budgeted hours from Wen and Ji should be added to timesheets moving forward.	
Special Issues		
Cost as of	*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	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	0.00

	Variance (Projected minus Actual):			0.00
	Reason for Variance:			

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

Other Measures

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

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

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

Report Period	Nov, 2023 (TSME24 STrak: Migration to	Initiation
Risk Level	Some Concerns	
Monthly Updates	SQL Anywhere 17 test server Third party software installed - done SQL Anywhere 17 installed - done Database created - done, but questions about configuration Data load - done RDP to test server created: \\SRC-Douvan\SRO\groups\TSG\tsprog\sysprog\SHARE\DBA Activities\RDPs\Test server (STdbtest01).rdp User ID: STDevAdmin or each person's ISR AD user Password: In password safe, same as STDevAdmin or user's PlanB password SAS connection tested by Paul Burton SQLA11 database copied to ST-Classic, Problem: Unable to start the database. Error: "Transaction log not found" Fix: Edit server configuration and remove reference to mirror log Client ODBC 32 bit created Testing PC created RDP to test PC: \\SRC-Douvan\SRO\groups\TSG\tsprog\sysprog\SHARE\DBA Activities\RDPs\Test PC (sro2tsz).rdp SRSM copied, ini file edited Removed spaces from folder names on D: Corrected names in Server config, tSystem_Codes, SRSM INI file, ODBC Remote service created	

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

Special Issues		
Cost as of	*Total Cost to Date (direct + indirect):*	1,648.92
	Est Cost at Completion (E$AC):	20,893.05
	Total Budget:	10.00
	Variance (Total Budget minus- E$AC):	9,106.95
	Reason for Variance:	
Projections as of	*Dollars Projected for Month:*	2,749.16
	Actual Dollars Used:	1,142.38
	Variance (Projected minus Actual):	1,606.78
	Reason for Variance:	

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

Other Measures