
Survey Research Operations

Monthly Project Report

Sponsored Data Collection Projects and Development Initiative

April 2024



Sponsored Data Collection Projects and Development Initiative Projects

(ANES 2024) American National Election Studies - 2024
(BFY) Baby's First Years
(BHM Library Project) Developing a Model of Black History Month Programming in Public Libraries
(CAMS 2023) HRS 2023 Consumption and Activity Mail Study
(Care & Help Study) Caregiving, Complex Family and Kinship Ties, and Alzheimer's Disease and Related Dementias (ADRD)
(CARE Military) Concussion Assessment, Research and Education (CARE) Consortium 2022 - Military
(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022
(CCS) Community College Survey
(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
(HRS2022-Screening) HRS 2022 - Screening
(IHDS3) India Human Development Survey Wave 3
(LHMS 2023 Fall) Life History Mail Study Fall 2023
(LHMS 2023 Spring) Life History Mail Study Spring 2023
(MI CReSS (Year 3 & 4)) Michigan COVID-19 Recovery Surveillance Cohort Study
(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027
(MTF Early Panel Pilot) Monitoring the Future: A Cohort-Sequential Panel Study of Drug Use, Ages 19-65 - Administrative Supplement #1 (8/10th Grade Panel)
(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027
(NDWS) National Dementia Workforce Study
(PR-PSID) Puerto Rico Panel Study of Income Dynamics
(PSID 2025 OCU) PSID 2025 Online Contact Update
(PSID CDS 2023) PSID Childhood Development Supplement 2023
(PSID TAS 2023) Transition to Adulthood within its Life Course & Intergenerational Family Context
(PSID23) Panel Study of Income Dynamics Core 2023
(SCA 2024) Surveys of Consumer Attitudes
(SRS 2021) Social Relations 2023
(STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study
(TSME24 DCO System Support (483248)) TSME24 DCO System Support (483248)
(TSME24 MSMS performance work (425267)) TSME24 MSMS performance work (425267)
(TSME24 QC Systems (483249)) TSME24 QC Systems (483249)
(TSME24 SRO System Maintenance - General (483910)) TSME24 SRO System Maintenance - General (483910)
(TSME24 SSL Autoscheduler interface development (42) TSME24 SSL Autoscheduler interface development (423463)
(TSME24 STrak: Migration to SQL Anywhere V17 () TSME24 STrak: Migration to SQL Anywhere V17 (483227)

Sponsored Projects Dashboard

NonArchived Sponsored Projects							
Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr
<i>ANES 2024</i>	Sponsored	Implementing	Andrew L Hupp				
<i>BFY</i>	Sponsored	Implementing	Piotr Dworak				
<i>BHM Library Project</i>	Sponsored	Implementing	Karin Schneider				
<i>CAMS 2023</i>	Sponsored	Closing	Gloria J Baker				
<i>Care & Help Study</i>	Sponsored	Implementing	Margaret Lee Hudson				
<i>CARE Military</i>	Sponsored	Implementing	Donnalee Ann Grey-Farquharson				
<i>CARE SALTOS MTEC</i>	Sponsored	Implementing	Donnalee Ann Grey-Farquharson				
<i>CCS</i>	Sponsored	Closing	Jeffrey Albrecht Jr				
<i>Health and Well Being in SE MI</i>	Sponsored	Implementing	Barbara Lohr Ward				
<i>HRS 2022 Panel & Baselines</i>	Sponsored	Implementing	Evanthia Leissou				
<i>HRS 2024</i>	Sponsored	Planning	Evanthia Leissou				
<i>HRS2022-Screening</i>	Sponsored	Implementing	Evanthia Leissou				
<i>IHDS3</i>	Sponsored	Implementing	Sarah Elisa Broumand				
<i>LHMS 2023 Fall</i>	Sponsored	Implementing	Gary Hein				
<i>LHMS 2023 Spring</i>	Sponsored	Implementing	Gary Hein				
<i>MI CReSS (Year 3 & 4)</i>	Sponsored	Implementing	Timothy Prand				
<i>MTF Base Year 2022_27</i>	Sponsored	Implementing	Rebecca Gatward				
<i>MTF Early Panel Pilot</i>	Sponsored	Implementing	Donnalee Ann Grey-Farquharson				
<i>MTF Panel 2022-27</i>	Sponsored	Implementing	Donnalee Ann Grey-Farquharson				
<i>NDWS</i>	Sponsored	Planning	Margaret Lee Hudson				
<i>PR-PSID</i>	Sponsored	Initiation	Camila Kendall				
<i>PSID 2025 OCU</i>	Sponsored	Planning	Camila Kendall				
<i>PSID CDS 2023</i>	Sponsored	Implementing	Piotr Dworak				
<i>PSID TAS 2023</i>	Sponsored	Implementing	Elizabeth Ohryn				
<i>PSID23</i>	Sponsored	Implementing	Rachel Anne Orłowski				
<i>SCA 2024</i>	Sponsored	Initiation	William Keating				
<i>SRS 2021</i>	Sponsored	Implementing	Barbara Lohr Ward				
<i>STARRS-LS Waves 3 & 4</i>	Sponsored	Implementing	Meredith A House				

Project Name	(ANES 2024) American National Election Studies - 2024 (Some Concerns)		
Project Mode	Primary: Web	Secondary: Face to Face	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 4,267,472.00	Indirect Budget: 2,283,848.00	Total Budget: 6,551,320.00
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#: HUM00226016	Period of Approval: Study is exempt	
Project Team	Project Lead: Andrew L Hupp Budget Analyst: William Lokers Production Manager: Theresa Camelo Senior Project Advisor: Grant D Benson Production Manager 1: Margaret Lavanger Production Manager 2: Lisa Van Havermaet		
Proposal #	no data		
Description	The mission of the American National Election Studies (ANES) is to inform explanations of election outcomes by providing data that support rich hypothesis testing, maximize methodological excellence, measure many variables, and promote comparisons across people, contexts, and time. The ANES serves this mission by providing researchers with a view of the political world through the eyes of ordinary citizens. SRO will be conducting the 2024 data collection.		
SRO Project Period	07/2023 - 01/2025		
Data Col Period			
Security Plan	NA		
Milestones	Pre Production Start: 03/01/2024 Pretest End: Staffing Complete: SS Train Start: 07/11/2024 DC Start: 08/01/2024 Pretest Start: Recruitment Start: GIT Start: 07/10/2024 SS Train End: DC End: 12/31/2024		
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) Paul Burton - Sampling and Reporting Makenna Harrison - Sampling and Reporting Marsha Skoman - SurveyTrak programming + Tech Lead Karl Dinkelmann - Blaise oversight + Tech Lead James Rodgers - MSMS + Tech Lead Ashwin Dey - WebTrak Pam Swanson - MSMS set-up programming Sarah Broumand - PQT and QC set-up Peter Sparks - Blaise programming Max Malhotra - Blaise programming Youhong Liu - Blaise programming Jude Perillo - Login portal Hueichun Peng - Self-scheduler Tony Romanowski - Technical specifications and testing Andrew Piskorowski - ODS		
Other Project Name			
Sample Mgmt System	SurveyTrak; MSMS		
Data Col Tool	Blaise 5; Other (PAPI)		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	External vendor (DataForce)		
QC Recording Tool	Camtasia		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Check, post (\$25/\$40 Escalation to \$100); Cash, prepaid (\$5/\$10); Cash, post (Pre-Election token amount)		
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)		
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Report Period	Apr, 2024 (ANES 2024)	Implementing
Risk Level	Some Concerns	
Monthly Updates	<p>The research team settled on the stratification variables for the SSUs. The sampling team were able select SSUs. late last week. Due to 2024 HRS Panel reports Paul is unable to work on the development of ANES reports. In the interim, Wen is going to develop the ANES reports with assistance from Makenna when she returns. We are working with the research team on the additional costs for data (from L2) that they would like appended to the sample file. It's ~\$20,000 more than we budgeted for the sample purchase. MSG is working with us to make it as cost-effective as possible.</p> <p>We were able to hire 39 on-staffers (1-PC, 5-TLs, 18-local interviewers, 15-travelers). The posting for 25-30 new hires went up on 5/7. New hire recruiting is going slow. Last week Mark B. said he needed an additional \$6,000 (above what we budgeted for recruitment ads). Grant met with him (I was at AAPOR) and they reworked the Team Tailor wording to help applicants better understand the position. Mark has since comeback with a request for an additional \$10,000.</p> <p>Rebecca is coordinating the training. The new hire training will be 3 days (1.5-GIT, 1.5-SS) in Ann Arbor July 9-11 (travel July 8 and July 12). The team has been working through the logistics (hotel site, training site, in-person agenda and content, post-training agenda and content, etc.). We will largely be utilizing the branding of the study. The interviewers will identify themselves as being from the U-M, but they will likely have bags with the ANES logo, and the web studies will be using variants of the electionstudies.org website for the survey and email addresses associated with the study.</p> <p>Marsha has provided an early version of SurveyTrak for Tony to test. Hueichun has been working on the self-scheduler. Marsha, Hueichun, and Andrew have met several times to discuss each system individually and the interaction between the two. Jim is working on the MSMS specs. It's the system that is the furthest behind (development wise). It likely has the least amount of development, other than the login portal. The pre-election instrument is programmed through spec 6, with spec 7 currently being worked on. We are waiting on spec 8 (the final pre-election spec). The post-election instrument is programmed through spec 5.</p> <p>We are waiting on the PI team for final design decisions on many things including: the screener spec, the spouse/partner spec, the final pre-election instrument spec, the materials (we'll need to translate them after we receive them), whether we will do the last ditch paper survey for pre-election, which/how many cases we will offer video to, and whether the SSL or the field will conduct the video interviews. We've communicated the need for these items to the research team. They have provided drafts in some cases, but not final versions. We will need these materials ASAP. We expect to receive some of these items this week.</p> <p>We answered questions from suppliers for the RFP we issued through Procurement. To-date we do not have a vendor in place. We will need to start working with the vendor immediately once one is in place. The design has changed a little from when we wrote the RFP (probably for the better), but there are materials that need to be mocked-up, supplies and cash procured, printing and assembling, all in about a two month period.</p>	

Special Issues		
Cost as of May 16, 2024	Total Cost to Date (direct + indirect):	203,133.23
	Est Cost at Completion (E\$AC):	6,692,428.00
	Total Budget:	6,551,320.00
	Variance (Total Budget minus- E\$AC):	-141,108.00
	Reason for Variance:	The increase in the variance is largely due to requests from DCO for additional advertising money for recruitment and for the increase in the sample purchase due to additional (L2) data the client wants. The client is aware of the additional cost for that data. Budget numbers were hand entered from the cost report. The numbers pulled in from CRS differed.

Projections as of May 16, 2024	Dollars Projected for Month:	128,507.36
	Actual Dollars Used:	72,484.63
	Variance (Projected minus Actual):	56,022.73
	Reason for Variance:	Unused projections were pushed forward.

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

Other Measures	
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Project Name	(BFY) Baby's First Years (On Track)												
Project Mode	Primary: Face to Face Total of Modes: 1												
Project Type	Sponsored Projects												
Budget	Direct Budget: 6,593,681.00	Indirect Budget: 2,106,680.73	Total Budget: 8,700,361.73										
Principal Investigator/Clients	Dr. Greg Duncan (University of California - Irvine)												
	Dr. Kimberly Noble (Teachers College Columbia University)												
	Dr. Katherine Magnuson (University of Wisconsin)												
Funding Agency	National Institute of Child Health and Human Development (NICHD)												
IRB	HUM#: HUM00137963	Period of Approval:											
Project Team	Project Lead: Piotr Dworak												
	Budget Analyst: Janelle P Cramer												
	Production Manager: Veronica Connors-Burge												
	Senior Project Advisor: Stephanie A Chardoul												
	Production Manager 1: Margaret Lavanger												
	Production Manager 2: Michelle Smith												
Proposal #	no data												
Description	<p>University of Michigan Survey Research Center (U-M SRC) is contracted to recruit and interview participants for Baby's First Years -- a longitudinal randomized control trial study.</p> <p>The study's full name, listed on sub-contract documents, is Household Income and Child Development in Early Years. The study will draw on a convenience sample of mothers and their newborns in four US metropolitan areas: New York City; Omaha/Lincoln; New Orleans; and Minneapolis. One or two hospitals, listed in this application, will be used as recruiting sites in each area. The study uses a randomized control trial design in which low-income mothers and newborns will be randomly assigned to a treatment group that receives an unconditional income enhancement -- cash payments of \$333 per month—an amount roughly comparable to a variety of income assistance policies in the U.S. and shown to be associated with meaningful improvements for poor children in prior studies—or to a control condition that receives \$20 per month. In both groups, the payments will be made for the first 40 months of the child's life. To understand the impacts of added income on children's development, researchers will assess treatment/control group differences at ages 1, 2 and 3 on measures of cognitive, language, memory, self-regulation and socio-emotional development. Recruitment is scheduled to start in April of 2018, and each follow-up interview will be conducted 12 months later -- close in time to the child's 1st, 2nd, and 3rd birthday. The feasibility of the approach has been established in a one-year pilot conducted in 2014 at the New York Presbyterian Hospital/Columbia University Medical Center.</p> <p>The Principal Investigators are Dr. Greg Duncan from University of California Irvine (UCI), Dr. Kimberly Noble from Teacher's College Columbia University (TCCU), and Katherine Magnuson from University of Wisconsin-Madison (UWM). UCI (Dr. Duncan) and TCCU (Dr. Noble) are the institutions and signatories funding the U-M SRC subcontract from various sources including the National Institute for Child Health and Human Development (NICHD) and private foundations listed in this application. The study research team also includes co-investigators Lisa Gennetian (New York University), and Hiro Yoshikawa (New York University).</p> <p>SRO will be responsible for four interactions with the selected mothers/infants:</p> <ul style="list-style-type: none"> • Baseline will occur immediately (within 24-48 hours) after birth, in the hospital; • Wave 1 will be a telephone interview with the mother when the child is 12 months old; • Wave 2 will be an in-person interview in the family's home that includes survey, developmental assessment, biomarker collection, and video recorded behavioral interaction when the child is 24 months old; • Wave 3 will be an in-person survey done while the mother and child are visiting a lab for other clinical tests when the child is 36 months old. <p>Each data collection phase/wave will be a full 12 months, with Baseline starting in April 2018:</p> <p>Recruitment/Baseline: 04/01/2018 - 03/31/2019 Wave 1: 04/01/2019 - 03/31/2020 Wave 2: 04/01/2020 - 03/31/2021 Wave 3: 04/01/2021 - 03/31/2022</p>												
SRO Project Period	10/2017 - 12/2020												
Data Col Period	04/2018 - 12/2020												
Security Plan	NA												
Milestones	<table border="0"> <tr> <td>Pre Production Start: 10/01/2017</td><td>Pretest Start:</td></tr> <tr> <td>Pretest End:</td><td>Recruitment Start: 01/01/2018</td></tr> <tr> <td>Staffing Complete: 02/07/2018</td><td>GIT Start: 03/19/2018</td></tr> <tr> <td>SS Train Start: 03/20/2018</td><td>SS Train End: 03/22/2018</td></tr> <tr> <td>DC Start: 05/07/2018</td><td>DC End: 06/30/2022</td></tr> </table>			Pre Production Start: 10/01/2017	Pretest Start:	Pretest End:	Recruitment Start: 01/01/2018	Staffing Complete: 02/07/2018	GIT Start: 03/19/2018	SS Train Start: 03/20/2018	SS Train End: 03/22/2018	DC Start: 05/07/2018	DC End: 06/30/2022
Pre Production Start: 10/01/2017	Pretest Start:												
Pretest End:	Recruitment Start: 01/01/2018												
Staffing Complete: 02/07/2018	GIT Start: 03/19/2018												
SS Train Start: 03/20/2018	SS Train End: 03/22/2018												
DC Start: 05/07/2018	DC End: 06/30/2022												

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

Report Period	Apr, 2024 (BFY)	Implementing
Risk Level	On Track	
Monthly Updates	<p>BFY Age 5- 8:</p> <p>BFY has awarded SRO continuing work throughout Age 8 (August 2027). We are currently conducting a one-time Age5 Catch Up activity re-contacting all Rs who completed Age 4 Lab Visit but have not had their contact information updated since.</p> <p>We were able to re-contact close to 84% of respondents after the Age 4 visits. Respondents harder to re-contact report having issues with the Lab communication protocols during Age 4 and being under the assumption the study is done. Pls had sent a data collection update / newsletter to address this issue.</p> <p>As part of that effort, we are also sending a 5-year birthday postcard to the focal children. No other data collection is planned at the moment.</p> <p>Age 6 timeline.</p> <p>Our involvement with Age 6 lab recruitment starts on 6-17. Short 1 hour iwer training is planned for 6-3. Additional in-service training in August.</p> <p>Preliminary mock data will be sent to the PI team in early May. SRC and the research team are finalizing the Age 6 Lab recruitment specifications (incentives, etc.). We confirmed we will make no changes to the process successfully executed in Age 4 Lab recruitment with two exceptions - SRC interviewers will be asked to follow up with non-response or hard-to-reach cases sooner and will be asked to complete phone interviews with hard-to-reach cases. To that end, additional SRO interviewers will get access to the BFY Sample Management System developed by University of Wisconsin. Currently, the PMs, TLs, and Locators have access.</p> <p>Age 5 Staffing:</p> <p>We had one attrition in MN but otherwise continue to retain BFY Age 3 staff.</p> <p>10 iwers in total NE: 1 OS + 1 NH (Trained 9/15/22) MN: 0 local NY: 3 OS NOLA: 1 Locators: 2 TLs: 1</p> <p>Technical system: To prepare for the A6 lab recruitment, the BFY MSMS had undergone an overhaul (updating sync and how the task rules perform).</p> <p>Finances: Rate increases and outstanding programming work put us over-budget monthly but after some adjustments we are showing a modest -6K overrun through July 2027.</p>	

Special Issues

Cost as of May 16, 2024	Total Cost to Date (direct + indirect):		7,685,257.82
	Est Cost at Completion (E\$AC):		8,706,383.03
	Total Budget:		8,700,361.73
	Variance (Total Budget minus- E\$AC):		-6,021.30
	Reason for Variance:	Projections were adjusted to reflect rate increases and additional MSMS work required for Age 6 Lab recruitment. In particular, the rate increases swung the BFY cost projection from underrun into overrun. However, subsequent adjustment made after this update brought overrun down from \$111K to around \$20K.	

Projections as of May 16, 2024	Dollars Projected for Month:		21,571.48
	Actual Dollars Used:		26,487.99
	Variance (Projected minus Actual):		-4,916.51
	Reason for Variance:	In March we continued some tech development which was projected earlier in the budget but was sidelined as PSID Core, CDS, and TAS required most MSMS resources.	

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

Other Measures

Project Name	(BHM Library Project) Developing a Model of Black History Month Programming in Public Libraries (On Track)		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 126,712.00	Indirect Budget: 70,959.00	Total Budget: 197,671.00
Principal Investigator/Clients	Deborah Robinson (ISR)		
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Karin Schneider		
	Budget Analyst:		
	Production Manager:		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	SRO will support the project in the first year by working with you to design the sample. SRO will support the implementation of up to two pilot surveys and the larger national survey of libraries. We will provide consultation on scale development throughout the pilot phase and provide statistical support to finalize the scales and provide a working dataset (with weights to account for the stratified sample design). In total, the SRO period of performance will be approximately 24 months in duration, starting in February of 2023, with data collections for the pilots and national survey taking place over approximately 12 months, starting in late 2023.		
SRO Project Period	02/2023 - 02/2025		
Data Col Period	10/2023 - 09/2024		
Security Plan	NA		
Milestones	<div> <div>Pre Production Start:</div> <div>Pretest End:</div> <div>Staffing Complete:</div> <div>SS Train Start:</div> <div>DC Start:</div> </div> <div> <div>Pretest Start:</div> <div>Recruitment Start:</div> <div>GIT Start:</div> <div>SS Train End:</div> <div>DC End:</div> </div>		
Other Project Team Members			
Other Project Name	Developing a Model of Black History Month Programming in Public Libraries		
Sample Mgmt System	Web SMS		
Data Col Tool	Blaise 5		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Not used		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
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Report Period	Apr, 2024 (BHM Library Project)		Implementing
Risk Level	On Track		
Monthly Updates	Pilot 2 underway, convenience sample.		
Special Issues	None		
Cost as of May 07, 2024	Total Cost to Date (direct + indirect):	89,684.88	
	Est Cost at Completion (E\$AC):	197,442.37	
	Total Budget:	197,671.00	
	Variance (Total Budget minus- E\$AC):	228.63	
	Reason for Variance:	NA	
Projections as of May 07, 2024	Dollars Projected for Month:	8,520.00	
	Actual Dollars Used:	8,520.00	

Reason for Variance:None				
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

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

Report Period	Apr, 2024 (CAMS 2023)		Closing
Risk Level	On Track		
Monthly Updates	<div>During the month of April, the team worked on</div> <div>1. Logging SAQs and sending to Duplicating</div> <div>2. 4,189 CAMS lines have been finalized of which 3,643 have completed the questionnaire. The current response rate is 58%.</div> <div>3. QC and shipping is completely caught up.</div> <div>The latest SAQ was received on April 17th and steps have been taken to close out project. The final FPR was sent on 5/9. Jeannie is working on final summary report, cleanup and will send list of SIDs and result codes to HRS in May. The final MPR will be in June.</div>		
Special Issues	Due to an sample address error, 2nd address lines were omitted on about 500 priority mail envelopes (4th mailing). If these are returned, they will be mailed out via USPS. We expect to incur additional USPS costs associated with this error. Update: approx 160 remails were sent from final mailing through Apr.		

Cost as of May 16, 2024	Total Cost to Date (direct + indirect):	410,978.86
	Est Cost at Completion (E\$AC):	366,820.75
	Total Budget:	473,136.00
	Variance (Total Budget minus- E\$AC):	106,315.25
	Reason for Variance:	The variance is primarily due to staff assigned to the project compared to budgeted resources. The project is also achieving a slightly lower response rate which impacts logging hours, check voids, etc. Projections for close-out activities will be added to CRS once the new shortcodes have been created.

Projections as of May 16, 2024	Dollars Projected for Month:	834.24
	Actual Dollars Used:	1,972.88
	Variance (Projected minus Actual):	-1,138.64
	Reason for Variance:	Variance due to more staff hours needed in April than originally projected.

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

Other Measures

Project Name	(Care & Help Study) Caregiving, Complex Family and Kinship Ties, and Alzheimer's Disease and Related Dementias (ARD) (On Track)		
Project Mode	Primary: Focus Group	Secondary: Cognitive IW	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 35,091.00	Indirect Budget: 7,545.00	Total Budget: 42,636.00
Principal Investigator/Clients	Sarah E. Patterson (University of Michigan - Survey Research Center)		
Funding Agency			
IRB	HUM#: HUM00237431	Period of Approval: 7/6/2023-7/31/2024	
Project Team	Project Lead: Margaret Lee Hudson		
	Budget Analyst:		
	Production Manager:		
	Senior Project Advisor: Lisa S Holland		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	Family and unpaid caregivers can influence the health and well-being of older adults through the care they provide and attitudes they hold about that care. However, the range of caregivers may extend beyond those most often captured in surveys (i.e. partners or adult children). Disadvantages may be especially present for older adults who have Alzheimer's Disease and Related Dementia (ARD) who require more intensive and persistent care over time, and thusly rely on a more extended network of caregivers. This project seeks to enhance our understanding of diverse family and unpaid caregiver experiences and how this process may differ for those caring for an older adult living with dementia. This project will conduct focus groups with two groups of caregivers who help someone with memory issues, with 8 to 10 participants each.		
SRO Project Period	07/2023 - 07/2024		
Data Col Period	07/2023 - 07/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Focus group phase (7/23-10/23): Margaret Hudson Cog IW phase (1/24-6/24): Margaret Hudson, TBD		
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Cash, post (\$60 focus groups; \$50 cognitive interview)		
Payment Method	Imprest Cash Fund from ISR Business Office		

Report Period	Apr, 2024 (Care & Help Study)		Implementing
Risk Level	On Track		
Monthly Updates	The PI drafted a cognitive interview guide for the next phase of the project and is having colleagues review it. We discussed plans for recruitment (PI-led) and scheduling (SRO-led) of participants in the cognitive interviews. In May the interview guide will be finalized and materials submitted to the IRB, with hopes of beginning recruitment in the second half of the month.		
Special Issues			
Cost as of May 16, 2024	Total Cost to Date (direct + indirect):		8,213.22
	Est Cost at Completion (E\$AC):		16,439.28
	Total Budget:		42,636.00

Variance (Total Budget minus- E\$AC):		26,196.72		
Reason for Variance:		Haven't yet started the next phase of the study, at PI's request/timeline change		
Projections as of May 16, 2024	Dollars Projected for Month:	5,097.76		
Actual Dollars Used:		371.90		
Variance (Projected minus Actual):		4,725.86		
Reason for Variance:		Haven't yet started the cognitive IWs		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

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

- Military work re-started April 2024.
 - Civilian funds split for military work is now active in April 2024.
 - Prepared the PI monthly report.
2. Care SMS system:
- We are expecting to receive over 400 new military samples to start the work.
 - Working with Datalys and QG team on cleaning up sample issues prior to receiving the new samples.
3. Questionnaire Development
- planning to coordinate with Datalys to test some changes in the survey sections.
4. Production: Military work resumed in April 2024 (Total Sample = 6957)
- Total Completed Iws = 427
- Web = 425
- CATI = 2
5. Hiring and Training
- Identified interviewers who will work on military samples.
6. DMSS:
- Data managers worked with the SRO management team to review the accuracy of the locating reports.

Special Issues				
Cost as of Apr 30, 2024		Total Cost to Date (direct + indirect):		1,684,473.95
		Est Cost at Completion (E\$AC):		1,684,473.95
		Total Budget:		1,685,902.70
		Variance (Total Budget minus- E\$AC):		1,428.75
		Reason for Variance:	We don't have new funding currently to support the military work. However, military work resumed in April 2024 with civilian funds. **Note: We spent \$14,747.79 on Military project with the Civilian funds in April 2024. The current spending is reflected the overrun amount in Civilian funds.	
Projections as of Apr 30, 2024		Dollars Projected for Month:		0.00
		Actual Dollars Used:		14,747.79
		Variance (Projected minus Actual):		-14,747.79
		Reason for Variance:	We didn't have projection under Military funds since August 2024. But We spent \$14,747.79 on Military project with the Civilian funds in April 2024. The current spending is reflected the overrun amount in Civilian funds.	
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022 (On Track)												
Project Mode	Primary: Telephone	Secondary: Web	Total of Modes: 2										
Project Type	Sponsored Projects												
Budget	Direct Budget: 3,718,978.00	Indirect Budget: 966,936.00	Total Budget: 4,685,914.00										
Principal Investigator/Clients	Dr. Steven Broglio (U of M Kinesiology)												
	Dr. Michael McCrea (Medical College of Wisconsin)												
	Dr. Thomas McAllister (Indiana University School of Medicine)												
Funding Agency													
IRB	HUM#: 00202691	Period of Approval: 7/23/2021 - open											
Project Team	Project Lead: Donnalee Ann Grey-Farquharson												
	Budget Analyst: David Kellermeyer												
	Production Manager: Barbara Aghababian-Homburg												
	Senior Project Advisor: Barbara Lohr Ward												
	Production Manager 1: Hongyu Johnson												
	Production Manager 2: Keith Liebetreu												
Proposal #	no data												
Description	<p>SRO will provide consultation, respondent locating activities and data collection for respondents in the longitudinal Concussion Assessment, Research and Education (CARE) study, with the goal of securing participation from 7,500 unique past-CARE study participants. Participants will complete the same set of study assessments at two time points over the five-year project period. The project follows collegiate athletes post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure. Specifically, SRO decentralized field interviewers will locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.</p> <p>This budget assumes an overall SRO involvement period of approximately 44 months over two waves. Wave 1 SRO involvement will begin in December 2021 with data collection taking place over approximately 12 months, beginning approximately May 2022. Wave 2 SRO involvement will begin in November 2023 with data collection taking place over approximately 12 months starting in May 2024.</p> <p>Currently, the total cost for the overall scope of work (based on the currently committed funding from all sources) is estimated at \$4,685,914. This includes \$3,718,978 direct and \$966,936 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders). As additional sources of funding are identified and those resources committed to SRO survey data collection activities, or inversely if a funder withdraws or reduces their level of funding to the project, the scope of work (e.g., the number of interviews to be collected) will increase or decrease respectively.</p> <p>The estimate of funding contributed by the Department of Defense through the MTEC RFP is \$2,277,689. This includes \$1,807,689 direct costs and \$470,000 indirect costs budgeted at the 26% indirect cost rate. The proposed period of support is September 1, 2021 through August 31, 2025.</p>												
SRO Project Period	10/2021 - 08/2026												
Data Col Period	03/2022 - 02/2026												
Security Plan	NA												
Milestones	<table> <tr> <td>Pre Production Start:</td><td>Pretest Start:</td></tr> <tr> <td>Pretest End:</td><td>Recruitment Start:</td></tr> <tr> <td>Staffing Complete:</td><td>GIT Start:</td></tr> <tr> <td>SS Train Start:</td><td>SS Train End:</td></tr> <tr> <td>DC Start:</td><td>DC End:</td></tr> </table>			Pre Production Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Complete:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
Pre Production Start:	Pretest Start:												
Pretest End:	Recruitment Start:												
Staffing Complete:	GIT Start:												
SS Train Start:	SS Train End:												
DC Start:	DC End:												
Other Project Team Members	Donnalee Grey-Farquharson, Barb Homburg, Hongyu Johnson, Keith Liebetreu, James Koopman, Ruyi Chen, David Ackuaku, David Kellermeyer												
Other Project Name	CARE CSI, CARE SALTOS												
Sample Mgmt System	Other (non-SRO)												
Data Col Tool	Other (non-SRO)												
Hardware	Laptop; [UM cell] Phone												
DE Software	N/A												
QC Recording Tool	N/A												
Incentive	Yes, R												
Administration	UM Group (Kinesiology)												
Payment Type	Check, post (\$150.00)												

Payment Method	Check through other system (UM)			

Report Period	Apr, 2024 (CARE SALTOS MTEC)		Implementing	
Risk Level	On Track			
Monthly Updates	<div>1. Project Management:<ul style="list-style-type: none">- SRO management team started preparation for data collection for DCP3 Part 2 beginning in mid-May.- Civilian funds split for military work is now active in April 2024.-SRO confirmed with the PI team on using Tango Cards as the alternative payment method to the respondents who residing overseas (within the applicable countries).-Prepared the PI monthly report.</div> <div>2. CARE SMS system:<ul style="list-style-type: none">-SRO management team continuously triaged reported issues from the field team and worked with Datalys and QG to get system bugs resolved.</div> <div>3. Questionnaire Development<ul style="list-style-type: none">- planning to coordinate with Datalys to test some changes in the survey sections.</div> <div>4. Production: DCP3 Part 1 ended on April 30,2024.<ul style="list-style-type: none">- Production stats: As of 04/30/2024 (Total Released samples = 15423 (DCP3 Part 1)<ul style="list-style-type: none">Total Completed lws = 1873<ul style="list-style-type: none">Web = 1851CATI = 22- Locating Team: continued to use social media platforms to find potential respondents. As of 04/30/2024,<ul style="list-style-type: none">Total current tracking=825<ul style="list-style-type: none">- Total found = 367- Total Completed = 23</div> <div>5. DMSS:<ul style="list-style-type: none">- Data managers worked with the SRO management team to review the accuracy of the locating reports.</div> <div>6. Hiring and Training<ul style="list-style-type: none">- One Interviewer will leave CARE in May 2024</div>			
Special Issues				
Cost as of Apr 30, 2024	Total Cost to Date (direct + indirect):		2,317,793.80	
	Est Cost at Completion (E\$AC):		4,698,526.82	
	Total Budget:		4,685,914.00	
	Variance (Total Budget minus- E\$AC):		-12,612.82	
	Reason for Variance:		Internet Charges are under-projected. The adjustment will be made for May onward. **Note: We actually used \$14,747.79 on Military project with the Civilian funds in April 2024. The current spending on Military is reflected the overrun amount in Civilian funds.	
Projections as of Apr 30, 2024	Dollars Projected for Month:		143,098.59	
	Actual Dollars Used:		148,695.84	
	Variance (Projected minus Actual):		-5,597.25	
	Reason for Variance:		Regular staff hours were very closely projected and monitored. In general, some staff hours were diverted to accommodate needs on other projects. Overall, the projected amount is very close to the actual used amount in April. **Note: We actually used \$14,747.79 on Military project with the Civilian funds in April 2024. The current spending on Military is reflected the overrun amount in Civilian funds.	
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(CCS) Community College Survey (On Track)		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 560,774.00	Indirect Budget: 84,115.00	Total Budget: 644,889.00
Principal	Hana Lahr (Teachers College, Columbia University)		
Investigator/Clients	Veronica Minaya (Teachers College, Columbia University)		
	Rachel Baker (University of Pennsylvania)		
Funding Agency	Ascendium Education Group		
IRB	HUM#: 00237400	Period of Approval:	
Project Team	Project Lead: Jeffrey Albrecht Jr		
	Budget Analyst: William Lokers		
	Production Manager: Ruth B Philippou		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1: Steven Sonoras		
	Production Manager 2:		
Proposal #	no data		
Description	The CCS seeks to understand factors that influence first year community college students in their program choice. We will survey a selection of students entering a community college for the first time in the fall of 2023 and then follow up with them in the second semester (Spring 2024) and their third semester (Fall 2024). The researchers will recruit 4 community colleges to participate.		
SRO Project Period	01/2023 - 03/2025		
Data Col Period	10/2023 - 11/2024		
Security Plan	NA		
Milestones	<div><div><div>Pre Production Start:</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start: 03/11/2024</div></div><div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End: 05/12/2024</div></div></div>		
Other Project Team Members	Marsha Skoman - Qualtrics Programmer Ed Green - Data Manager Hueichun Peng - Web SMS Programmer		
Other Project Name	How Community College Students Choose Programs of Study		
Sample Mgmt System	Web SMS		
Data Col Tool	Other (Qualtrics)		
Hardware	Desktop		
DE Software	NA		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Cash, prepaid (\$5); Cash, post (\$40); Other (Visa electronic gift cards, Amazon gift codes)		
Payment Method	Imprest Cash Fund from ISR Business Office; Other (VISA eGift cards from HSIP, Amazon gift codes from Teachers Coll)		

Report Period	Apr, 2024 (CCS)		Closing
Risk Level	On Track		
Monthly Updates	Wave 2 data collection concluded on May 12. We achieved a 61.4% RR with 2,774 completed surveys. Following is an overview of production efforts and costs in April. Invitation Cards By monitoring clicks on the QR code in the invitation cards, we determined that the cards did not arrive to SJC respondents, which accounted for roughly half of the Wave 2 sample (n = 2,039). We were unable to determine what happened to the cards but did learn that the Houston area was experiencing mail delays around the time that they were sent. We did not receive returned mail from the SJC cases. On account of prior research establishing the positive effects of prepayments on response rates, we expected positive results and opted to send cards to everyone with addresses, rather than to experimentally test effects. Had the SJC students received their invitation cards, we could only have analyzed differences between those who did and did not provide addresses, which would be confounded, because those who did not provide addresses in		

Wave 1 (n = 355) were expected to continue to be less responsive in Wave 2 for at least one of two reasons: not being contactable and/or not being motivated to participate in the study.

Serendipitously, the random loss of the invitation cards to SJC students made it possible to parse out some effects of Wave 1 responsiveness by differentiating three comparison groups:

- responsive participants who received cards (from IVC, LCCC, and PGC only)
- responsive participants who did not receive cards (from SJC only)
- non-responsive participants who did not receive cards (from any college)

Respondents from all colleges who did not provide a Wave 1 address completed at a much lower rate (30.9%) than those who provided addresses (~65%). Those who provided a Wave 1 address and received the invitation card with prepayment (no SJC students) responded at 7.4% pts higher (69.4%) than those who provided a Wave 1 address and did not receive the card (all SJC students; 62.0%). Looking at link source clicks, of all 1,580 surveys completed at the three colleges that received their cards, about 1/3 completed using the QR code (33.8% at IVC, 35.2% at LCCC, and 31.1% at PGC).

Emails

We sent 5 emails in April. One was an unexpected, last-minute message to inform respondents that the iPad drawing was happening soon, which bumped up responses (8.8% pts) more than any other email besides the first two. Combined with the fact that the financial motive group outperformed other groups, this further supports the financial motive as the most influential in promoting responses.

A majority of respondents (68.4%) used email links to initiate the survey.

Texts

We sent the Financial Gain text on April 3. Around 12% used a texted link to initiate the survey.

Reminder calls

Our four reminder callers called 924 SIDs (2,299 calls made) from April 3 through April 29.

From our experiment, we found that calling led to a 10.1% increase in responses from this relatively unmotivated group of respondents (those remaining in the sample at week 4 of Wave 2). Thus, calling appears to have outperformed the invitation card with \$5 prepayment in terms of response rates, as well as cost efficiency.

Incentives

The Wave 2 respondent payments amounted to \$123,520 total (\$83,920 paid from the U-M subaward). Visa (\$52,400) was the most popular, followed by Amazon (\$39,600) and cash (\$31,520).

Project Support

Becky managed Visa card payments before going OOTO in the later part of April, when Steven took over that task in addition to processing the cash payments weekly.

Sample Management

Hueichun updated WebSMS and added a report breaking down responses by call/no call groups.

Data Management

Ed and Jennie prepared for sample reconciliation and dataset preparation.

IRB

TC IRB will conduct their continuing review in June. We will submit their approval documents to U-M IRB right away, which need to be approved by July.

Special Issues

Now that Wave 2 has concluded, we are projecting a \$77,595 overrun for the project, which is primarily due to scope changes for respondent payment increases. The PIs have approved \$83,649 in writing. They have asked to work on the award in June. At that time, they will know what is left in the award after respondent payments have settled.

Bill and Nicole created a Wave 2 cost report showing total costs for directs and indirects, which Jeff will share with the PIs. The PIs will need to add however much they anticipate paying and consider whether a cap on production might be necessary. The overrun does not include any calling in Wave 3. The PIs have said that they would add funds if the current reminder calling experiment proves it would be worth it, though they have not indicated a clear standard for that decision. That said, we could most likely achieve the response rates they need and can more readily afford by just using emails and text messages in Wave 3.

Cost as of May 15, 2024	Total Cost to Date (direct + indirect):	511,958.38
	Est Cost at Completion (E\$AC):	722,484.34
	Total Budget:	644,889.00
	Variance (Total Budget minus- E\$AC):	-77,595.00
	Reason for Variance:	The overrun is down by about \$7,000 in April from March. This was in large part due to fewer respondent payments in April.
Projections as of May 15, 2024	Dollars Projected for Month:	65,645.05
	Actual Dollars Used:	58,044.59
	Variance (Projected minus Actual):	7,600.46
	Reason for Variance:	Respondent payments were over-projected by about \$12,000 in April. We expected production to continue to produce responses at a high rate.

Measures	Units at Complete	RR	HPI
<i>Current Goal:</i>	2774	61.4	1.3
<i>Goal at Completion:</i>	2774	61.4	1.3
<i>Current Actual:</i>	2774	61.4	1.3
<i>Estimate at Complete:</i>	2774	61.4	1.3
<i>Variance:</i>	0	0	0

Other Measures

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Project Name	(Health and Well Being in SE MI) Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan) (Attention!)		
Project Mode	Primary: Face to Face	Total of Modes: 1	
Project Type	Sponsored Projects		
Budget	Direct Budget: 2,409,055.00	Indirect Budget: 1,349,072.00	Total Budget: 3,758,127.00
Principal Investigator/Clients	Kristine Ajrouch (Life Course Development Program, SRC)		
	Toni Antonucchi (Life Course Development Program, SRC)		
	Laura Zahodne (Life Course Development Program, SRC)		
Funding Agency			
IRB	HUM#: HUM00146040		Period of Approval: 4/9/2020
Project Team	Project Lead: Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Taghreid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 600 interviews with recently identified Arab Americans aged 65 or older residing in Southeast Michigan and 330 interviews with Social Relations sample members aged 65 or older. The Arab American sample will be selected based on an in-person household screening. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements. Social Relations respondents will only complete the cognitive interview. An informant interview will also be conducted for all sample members. Interviews will be conducted in English or Arabic.		
SRO Project Period	05/2019 - 03/2023		
Data Col Period	05/2023 - 03/2024		
Security Plan	No		
Milestones	<div><div>Pre Production Start: 12/01/2022</div><div>Pretest End:</div><div>Staffing Complete: 04/10/2023</div><div>SS Train Start: 05/18/2023</div><div>DC Start: 05/30/2023</div></div> <div><div>Pretest Start:</div><div>Recruitment Start: 02/01/2023</div><div>GIT Start: 05/16/2023</div><div>SS Train End: 05/25/2023</div><div>DC End: 12/31/2024</div></div>		
Other Project Team Members	Taghreid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall		
Other Project Name	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	Apr, 2024 (Health and Well Being in SE MI)	Implementing
Risk Level	Attention!	
Monthly Updates	<p>BLUF: D-AMP new sample interviewing continued in April without clarity on continued funding. D-AMP new sample completions were still significantly underperforming, more so since the start of Ramadan on March 10 (and running through April 10). Screening in D-AMP continued thanks to one or two interviewers on the D-AMP interviewing team who concentrate on screening. Conducting Main interviews from newly-screened-in sample lagged as the newly-screened cases are largely resistant. The release of panel sample increased weekly completions, however the research team was not happy that interviewing was too skewed toward panel sample.</p> <p>We successfully training 27 screeners in April, including 12 bilinguals. The screeners are exceeding expectations in terms of productivity and effectiveness. They are managing to convert some older resistant screener lines to completes.</p> <p>During April, the team continued to wait for word on continued funding for the interviewing effort. The PIs told the</p>	

SRO team that funding looked positive, but there was no clarity on approval or how funds could be used. The Pls indicated that Healthy Brain funds could be used to fund D-AMP interviewing, however funding would be constrained. D-AMP has been projected to run out of funds for interviewing in late August 2024.

The SRO team had been planning for a training to bring on bilingual interviewers and refresh the team of interviewers who are trained in the main study. On May 13, the LCD team indicated that they were uncertain if they would move ahead with the D-AMP study. Due to the uncertainty around the future of the project, the SRO team did not sign a contract for training, and subsequently lost the training venue for June 10-14. We are now attempting to find another venue to move forward with the interviewer training.

On May 16, the Pls indicated that they received approval to merge D-AMP with Healthy Brain and that they wanted to continue to work with SRO on the data collection. There are some constraints on how the Healthy Brain funds can be used. The idea behind bringing the two studies together is that respondents will be recruited directly into the Healthy Brain project, using the D-AMP interview protocol as the recruitment means. It is our understanding that respondents that do not agree to participate into either the blood draw or MRI for Healthy Brain would need to be charged to the D-AMP grant. At present, the Healthy Brain project has a very low response rate (perhaps around 9%). The Pls are making some changes to the Healthy Brain project to help to increase the response rate (increasing the TOA for the blood draw). The low response rate is a risk to the overall plan for the studies. The Pls have indicated that the May/June training for bilingual and other interviewers can be charged to Healthy Brain. We will also charge some portion of our project and production management costs devoted to planning for the Healthy Brain project integration, as well as programming costs for the convenience sample, to the Healthy Brain Study. This will help leave room in the D-AMP shortcode for interviewing costs.

Part of the interviewing plan for D-AMP/Healthy Brain relies on the integration of a convenience sample. As of May 27, we do not yet see that the Pls have begun work to develop the convenience sample. This is an area of risk, as we do not have any experience with this sample or what it will cost to complete. The D-AMP/Healthy Brain study will need to be monitored very carefully to ensure that it does not go over budget.

Special Issues	We continue to project interviewing effort and results based on available funds remaining in the D-AMP shortcode, rather than projecting an overrun.			
Cost as of May 16, 2024	Total Cost to Date (direct + indirect):	2,976,847.40		
	Est Cost at Completion (E\$AC):	3,755,580.38		
	Total Budget:	3,758,127.00		
	Variance (Total Budget minus- E\$AC):	1,631.65		
	Reason for Variance:	The CRS was not updated after projections were updated on 5/22/2024. We are projecting that the study will use all of funds allocated for the new work scope approved during May 2024.		
Projections as of May 16, 2024	Dollars Projected for Month:	93,223.80		
	Actual Dollars Used:	84,310.84		
	Variance (Projected minus Actual):	8,912.96		
	Reason for Variance:	Salary was higher than projected, however non-salary was \$12,000 lower than projected. A hosting bill from the April training was not received, and production in late March and early April was lower than projected due to Ramadan.		
Measures		Units at Complete	RR	HPI
	Current Goal:	200/400/200 design		
	Goal at Completion:	200/400/200 design		
	Current Actual:	152/0/34	33% scr/32% main	31 hpi with scrning
	Estimate at Complete:			
	Variance:			
Other Measures	<p>The study is looking for a target of 200 new sample/400 convenience sample/200 panel sample completes. At this point we are not targeting a specific response rate.</p> <p>Interview results above are as of 5/27/2024</p> <p>RR shown above are for the released new screening sample. The panel sample RR is 7%.</p> <p>Budgeted at 140 minutes, the D-AMP average interview length is 160 minutes.</p> <p>Saliva participation rate is roughly 84% compared to 80% budgeted.</p>			

Project Name	(HRS 2022 Panel & Baselines) Health and Retirement Study 2022 Main Interviews (Some Concerns)		
Project Mode	Primary: Mixed Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	Direct Budget: 13,982,815.00	Indirect Budget: 5,033,815.00	Total Budget: 19,016,630.00
Principal Investigator/Clients	David Weir (ISR-SRC)		
Funding Agency			
IRB	HUM#: HUM000611128		Period of Approval: 6/7/2023-6/6/2024
Project Team	Project Lead: Evanthia Leissou		
	Budget Analyst: Richard Warren Krause		
	Production Manager: Andrea Sims		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Jennifer C Arrieta		
	Production Manager 2: Theresa Camelo		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.		
SRO Project Period	01/2021 - 12/2023		
Data Col Period	03/2022 - 08/2023		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 01/01/2021</div><div>Pretest End: 11/23/2021</div><div>Staffing Complete: 01/15/2022</div><div>SS Train Start: 02/23/2022</div><div>DC Start: 03/07/2022</div></div> <div><div>Pretest Start: 11/01/2021</div><div>Recruitment Start: 08/01/2021</div><div>GIT Start: 02/21/2021</div><div>SS Train End: 03/03/2022</div><div>DC End: 05/10/2025</div></div>		
Other Project Team Members	<div>Derek Dubuque (Production Manager), Alex Warju (Production Manager), Milagros Hierro (Production Manager), Deborah Zivan (Project Manager), Andrew Hupp (Project Manager), Gary Hein (Project Manager), Erin McSpadden (Project Manager), Daniah Buageila (Project Manager), Janet McBride (Project Assistant), Paul Burton (Stats/Sampling), Vanessa Clarke (Project Assistant), Jeannie Baker (Project Manager), Melissa Luker (Project Assistant), Anthony Romanowski (Project Manager), Megan Hromco (Project Assistant). Kristen Cross (Project Assistant), Austin De Spirito (Project Assistant), Cindy Huang (Budget Analyst), Andria Goedert (Project Assistant), Dominic Bonanni (Project Assistant)</div> <div>Tech Team: Karl Dinkelmann, Jeff Smith, Jim Rodgers, Laura Yoder, Marsha Skoman, Ashwin Dey, Pam Swanson, David Bolt, Deb Wilson, Jennie Williams, Rose Zybdel, Stephanie Windisch, Holly Ackerman, Shane Empie, Kelly Chatain, Brianna Sabol</div> <div>Coding Lead: Carolyn Vieira-Martinez</div>		
Other Project Name	HRS 2022 Main lws		
Sample Mgmt System	SurveyTrak; MSMS		
Data Col Tool	Blaise 5; SAQ		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Blaise 5 Coding Application); External vendor (DataForce)		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	NA		
Payment Type	Check, prepaid (\$80 (Panel)); Check, post (\$50 (WBD)); Cash, post (\$20 (SAQ), \$100 (Baselines))		
Payment Method	Check through STrak RPay System; Check through other system (Rpay system set up for MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (Rpay system set up for MSMS); Imprest Cash Fund from ISR Business Office (Rpay system set up for MSMS)		

Report Period	Apr, 2024 (HRS 2022 Panel & Baselines)		Implementing
Risk Level	Some Concerns		
Monthly Updates	1. The project team has been working on baseline production monitoring, cost monitoring, sample management,		

logging, weekly mailings and scanning(SSA and SAQ), payment and letter request processing, and implementing the baseline end game protocol.

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

3. Interviewer recruitment and planning for the May 30- June 7 new cohort training continued (goal: 80 iws)

4. Based on the propensity model run in September, 6,371 baseline cases that have ever been flagged priority of which 1,374 (22%) have completed an interview. Newly generated baselines from screening continue to be flagged on a weekly basis.

5. The endgame protocol sample consists of households with resistance or 120+ since screened. The sample is mailed a letter offering an additional \$100 upon completion of the interview and interviewers follow-up with one attempt before final coding non-interview, unless the interview was started on the spot or an appointment has been scheduled. 6,429 baseline respondents have been mailed the end game letter of which 586 (9%) have completed the interview. New cases are flagged for end game weekly.

6. Address sorting continued in preparation to release reserve screening sample in June.

7. Originally, the field management was split into two teams - one team to manage the screening effort and one team to manage interviewing effort. Early April, the field management team combined into one team to manage both screening and baselines.

*The "measures" table reflects Panel and Baseline combined as of 5/19/24. Breakdown of Panel and Baseline counts and rates in Other Measures Field.

Special Issues		<ul style="list-style-type: none"> - Did not meet the Panel response rate goal of 74% even with the additional five months of field time and responsive design strategies due to interviewer count and balancing effort with new cohort screening/baseline iws. - Slow progress with baseline interviewing. - Multiple Blaise issues that have impacted STRak and MSMS throughout data collection. - 2022 New Cohort data collection projected to end in May 2025 in order to meet goal. - Competing project team demands with HRS 2022 and HRS 2024 simultaneous data collections as well as multiple trainings planned for both in spring and fall 2024. - High field staff attrition rate. Burden on staff with additional recruitment and training efforts while managing production. 		
Cost as of May 16, 2024	Total Cost to Date (direct + indirect):			18,093,555.04
	Est Cost at Completion (E\$AC):			18,077,561.44
	Total Budget:			19,016,630.00
	Variance (Total Budget minus- E\$AC):			939,068.56
	Reason for Variance:	Minimal change in variance since the previous month's report. 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 May 16, 2024	Dollars Projected for Month:			-2,720.00
	Actual Dollars Used:			-890.35
	Variance (Projected minus Actual):			-1,829.65
	Reason for Variance:	Variance due primarily to postage/freight and vendor invoice that had not been projected..		
Measures		Units at Complete	RR	HPI
	Current Goal:	16,891	49%	11.7
	Goal at Completion:	22,215	44%	8.3
	Current Actual:	16,946	50%	11.6
	Estimate at Complete:	19,443	39%	10.8
	Variance:	2,772	5%	2.5
Other Measures		<p>Panel: Revised RR Goal: 68% (original goal 74%), Final RR: 68% (Panel end date 9/2/23)</p> <p>2022 Baselines generated from screener: Goal: 6,003 iws; Current: 3,477 iws from 12,196 baselines spawned from screener as of 5/19/24.</p> <p>2019 EGenX baselines: Goal RR: 70%, Current RR: 74.4% (497 iws)</p>		

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: 15,792,284.00	Indirect Budget: 5,685,224.00	Total Budget: 21,477,508.00
Principal Investigator/Clients	David Weir (ISR-SRC)		
Funding Agency			
IRB	HUM#: HUM000611128	Period of Approval: 6/7/2023-6/6/2024	
Project Team	Project Lead: Evanthia Leissou		
	Budget Analyst: Richard Warren Krause		
	Production Manager: Andrea Sims		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Derek Dubuque		
	Production Manager 2: Jennifer C Arrieta		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.		
SRO Project Period	05/2023 - 08/2025		
Data Col Period	05/2024 - 05/2025		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 05/15/2023</div><div>Pretest End: 02/18/2024</div><div>Staffing Complete: 03/15/2024</div><div>SS Train Start: 04/23/2024</div><div>DC Start: 05/13/2024</div></div> <div><div>Pretest Start: 01/29/2024</div><div>Recruitment Start: 12/19/2023</div><div>GIT Start: 04/22/2024</div><div>SS Train End: 04/29/2024</div><div>DC End: 05/31/2025</div></div>		
Other Project Team Members	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)		
	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, Asia Paige		
Other Project Name	HRS 2024 Panel		
Sample Mgmt System	SurveyTrak; MSMS		
Data Col Tool	Blaise 5; SAQ		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Blaise 5 Coding Application); External vendor (DataForce)		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	NA		
Payment Type	Check, prepaid (\$100 (Interview)); Check, post (\$50 (WBD), \$20 (SAQ), \$20 (SSA)); Cash, post (\$20 (SAQ))		
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office		

Report Period	Apr, 2024 (HRS 2024)	Planning
Risk Level	On Track	
Monthly Updates	<p>HRS 2024 pre-production activities continued with focus cost projections, technical specifications, technical development, testing (including SurveyTrak, interviewer administered and web self administered instrument, MSMS DCA, and MSMS task rules), training preparations, training, quality checks of the blaise preload delivered by HRS staff, precontact mailing preparations, pre-pay check processing, and addressing changes requested by IRB.</p> <p>Production training: - Southfield Westin 4/22-4/29 (2 days GIT, 7 days Study Specific)</p>	

- Interviewer count: 79 of which 72 were at in-person training. 7 trained at pretest and/or on HRS 2022 received a short webinar training.

Production:

-TEL, FTF, FTFe Production started (SurveyTrak): 5/13/24 when 3,875 SIDs were released to the field. The one week delay to start of data collection was due to timing of IRB approval and securing of stamped documents.

-Web Production Start (MSMS): 6/24/24

-Web Non-Response Follow-up Start (MSMS): 8/9/24

-Additional sample and preload will be delivered to SRO in fall of 2024 (amount of sample TBD).

Measures in table below are as of 5/19/24.

Special Issues		-Project team resource concerns for HRS 2024 and HRS 2022 with simultaneous production periods and multiple trainings planned in spring and fall 2024. -Blaise 5.14 issues related to the feature added at HRS' request for saving session database online and offline. As of 5/20/24, all known issues have been addressed/fixed.		
Cost as of May 17, 2024	Total Cost to Date (direct + indirect):			2,296,057.96
	Est Cost at Completion (E\$AC):			20,686,062.68
	Total Budget:			21,477,508.00
	Variance (Total Budget minus- E\$AC):			791,445.32
	Reason for Variance:	Projections in CRS are for pre-production and pretest data collection. Will update the total budget once the 6 year renewal proposal funds are awarded. Variance since last month is due to delay in the new award. We have been instructed to continue to charge the pre-production account codes until the new award comes in which was mid-May. The team is working to move pre-production costs from February 1, 2024 and on to the new account codes set up mid-May and will work on adding future projections to CRS.		
Projections as of May 17, 2024	Dollars Projected for Month:			309,788.31
	Actual Dollars Used:			1,149,437.49
	Variance (Projected minus Actual):			-839,649.18
	Reason for Variance:	Variance primarily due to pre-pay checks being processed and DCO hours not having been projected in CRS for the month of April. Future projections will be updated in CRS with the new shortcodes created mid-May.		
Measures		Units at Complete	RR	HPI
	Current Goal:	113	2.9% of released	12
	Goal at Completion:	19,117	70%	
	Current Actual:	110	2.8%	13.14
	Estimate at Complete:	19,117	70%	
	Variance:	0	0	
Other Measures				

Project Name	(HRS2022-Screening) HRS 2022 - Screening (Some Concerns)		
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 21,264,149.00	Indirect Budget: 7,655,093.00	Total Budget: 28,919,242.00
Principal Investigator/Clients	David Weir (SRC) Helen Levy (SRC) Ken Langa (SRC)		
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Evanthia Leissou Budget Analyst: Richard Warren Krause Production Manager: Senior Project Advisor: Nicole G Kirgis Production Manager 1: Andrew L Hupp Production Manager 2: Theresa Camelo		
Proposal #	no data		
Description	<p>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.</p>		
SRO Project Period	02/2021 - 08/2024		
Data Col Period	03/2022 - 06/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: 04/19/2022 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	SurveyTrak; MSMS; Other ((Blaise) Case Management App (CMA))		
Data Col Tool	Blaise 5		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Blaise 5 web instrument); N/A		
QC Recording Tool	Camtasia; N/A		
Incentive	Yes, R; Yes, INF		
Administration	SRO Group		
Payment Type	Check, post; Cash, prepaid (\$2); Cash, post		
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office		
=====			
Report Period	Apr, 2024 (HRS2022-Screening)		Implementing
Risk Level	Some Concerns		
Monthly Updates	<p>Screening is going at a steady pace. We've been exceeding both production and effort (hours) goals on screening. Most of release 6 is in the hands of interviewers. There remain a few unstaffed areas that haven't had trips that is still being held.</p> <p>We have released 11,914 cases to the endgame protocol. 1,035 cases (8.7%) of cases have completed a screener. 90 cases (8.7%) completed via the web, and 945 (91.3%) of cases completed in-person.</p> <p>Overall sorting of the first two replicates of the reserve sample is complete. Two segments (one due to size, one due to an issue with the map) were swapped with two replicate three segments so sample selection could proceed. Sample will be selected in early June. All cases will receive a web invitation and specific areas identified by the field will be activated at the same time.</p>		
Special Issues			

Cost as of May 16, 2024	Total Cost to Date (direct + indirect):	23,646,269.63
	Est Cost at Completion (E\$AC):	35,808,593.16
	Total Budget:	28,919,242.00
	Variance (Total Budget minus- E\$AC):	-6,889,351.16
	Reason for Variance:	Projections have been entered through March 2025 (projection of when we would meet the baseline production goal).

Projections as of May 16, 2024	Dollars Projected for Month:	1,011,118.17
	Actual Dollars Used:	1,048,192.72
	Variance (Projected minus Actual):	-37,074.55
	Reason for Variance:	Travel was over by ~\$26,000 and salary was over 1,500 hours. The majority of those hours were from the field interviewers . R-Pay was under and pushed forward.

Measures		Units at Complete	RR	HPI
	Current Goal:	7,017/3,645 HHs	73%	3.0
	Goal at Completion:			
	Current Actual:	4,361/3,625	48.0%	2.86
	Estimate at Complete:			
	Variance:			

Other Measures

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

Risk Level	On Track			
Monthly Updates	Not may updates for this month. We continue to finish up data recoveries, have about 40 left to go. Downloaded all CARI recordings for NCAER in April. Plan on sending external drive in May. SRO approved modifying the current SRO CARI player to work with IHDS3 so that NCAER can continue to view their recordings once the Contract Ends.			
Special Issues	Wave 3 funding balance ended at -\$18,833.61 direct and indirect costs (-\$12,072.53 Direct))			
Cost as of May 16, 2024	Total Cost to Date (direct + indirect):			108,066.25
	Est Cost at Completion (E\$AC):			134,018.45
	Total Budget:			134,259.00
	Variance (Total Budget minus- E\$AC):			240.55
	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 May 16, 2024	Dollars Projected for Month:			7,763.69
	Actual Dollars Used:			3,658.89
	Variance (Projected minus Actual):			4,104.80
	Reason for Variance:			Due to staffing constraints some of the allocated hours could not be used, they will be re-allocated moving forward.
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

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

Report Period	Apr, 2024 (LHMS 2023 Fall)		Implementing
Risk Level	On Track		
Monthly Updates	Fall LHMS activities and notable events: 1- SAQs received and logged 2- Progress reports prepared and delivered to Pls 3- SAQs shipped to DataForce for scanning 4- Scanned SAQs and Fall data deliveries delivered to HRS 5- Crosswalk for data delivery prepared by project managers		

6- Thank you post cards generated and mailed
7- SRO team members attended monthly check-in meeting with HRS Staff

Special Issues		- Budgeted goal of 54% seems high considering the sample consists of past wave non-responders and a few new spouses. The Spring LHMS, which also consisted of past wave non-responders, current response rate (as of 5/17/2024) is 17%.		
Cost as of May 16, 2024	Total Cost to Date (direct + indirect):	332,821.63		
	Est Cost at Completion (E\$AC):	264,923.63		
	Total Budget:	505,359.00		
	Variance (Total Budget minus- E\$AC):	240,435.37		
	Reason for Variance:	Staffing for reminder calling will not meet original projections and lower response rates than anticipated are resulting in lower costs across the project. The difference between last month's and this month's variance is due to coding not starting as originally projected since the data has not been delivered by HRS staff and an adjustment in expected check voids. Future projections in CRS will be updated once the new account codes are established.		
Projections as of May 16, 2024	Dollars Projected for Month:	13,529.96		
	Actual Dollars Used:	5,958.15		
	Variance (Projected minus Actual):	7,571.81		
	Reason for Variance:	Almost \$4,000 in coding projections were erroneously projected for April. This, along with lower recharges than expected, resulted in an underrun. Future projections will be updated once the new account codes are established.		
Measures		Units at Complete	RR	HPI
	Current Goal:	2063	54%	N/A
	Goal at Completion:	2063	54%	N/A
	Current Actual:	661	17%	N/A
	Estimate at Complete:	670	17%	N/A
	Variance:	1423	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#: HUM00106904	Period of Approval: 11/4/2022-11/3/2023	
Project Team	Project Lead: Gary Hein		
	Budget Analyst: Cindy Tsao		
	Production Manager: William Keating		
	Senior Project Advisor: Evanthia Leissou		
	Production Manager 1:		
	Production Manager 2: William Keating		
Proposal #	no data		
Description	<p>The HRS Life History Mail Survey (LHMS) is part of the Health and Retirement Study. The goal of LHMS is to collect retrospective life histories of HRS participants to address multidisciplinary need for information about events, residential location, and education over the entire life course. Information like this allows researchers to understand how individuals' pasts shape their health and economic situations today.</p> <p>A paper questionnaire will be mailed to a sample of approximately 2,288 HRS Respondents. From this sample, approximately 1,242 completed surveys are expected (54% response rate). For the reminder protocol, 495 respondents have been designated to receive a reminder by postcard. The remaining 1,793 respondents will receive reminders by phone to complete the questionnaire. When a respondent is reached by phone, SRO will attempt to complete the 60-minute interview by telephone. Thank you postcards will be mailed to respondents who return a completed questionnaire.</p>		
SRO Project Period	04/2023 - 12/2023		
Data Col Period	06/2023 - 09/2023		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 04/01/2023</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start: 07/11/2023</div><div>DC Start: 06/20/2023</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End: 07/11/2023</div><div>DC End: 09/26/2023</div></div>		
Other Project Team Members	Gary Hein: Project Lead Cindy Tsao: Budget Analyst Vanessa Clarke: Project Assistant Carolyn Viera Martinez: Coding Lead		
Other Project Name	LHMS Spring		
Sample Mgmt System	SMS		
Data Col Tool	SAQ; Other (Blaise SMS)		
Hardware	Desktop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Check, prepaid (\$25)		
Payment Method	Check through STrak RPay System		

Report Period	Apr, 2024 (LHMS 2023 Spring)		Implementing
Risk Level	On Track		
Monthly Updates	April Activities and Notable Events: 1 -Logged returned SAQs 2- Weekly progress reports created and delivered to project stakeholders 3- Data delivery of completed scanned SAQs to HRS 4- Completed SAQs mailed to DataForce for scanning 5- Created of data crosswalks for data deliveries 6- Generated and mailed thank you cards to respondents		

Special Issues	N/A			
Cost as of May 16, 2024	Total Cost to Date (direct + indirect):	257,058.62		
	Est Cost at Completion (E\$AC):	238,504.81		
	Total Budget:	457,922.00		
	Variance (Total Budget minus- E\$AC):	219,417.19		
	Reason for Variance:	Actual sample of 1,950 is lower than budgeted sample of 2,288, resulting in generally lower costs across all resources. Check voids have also been added to the projections. In addition, the budgeted response rate was 54% but actual response rate is much lower as the respondents are non-responders from past waves of LHMS.		
Projections as of May 16, 2024	Dollars Projected for Month:	579.47		
	Actual Dollars Used:	2,059.73		
	Variance (Projected minus Actual):	-1,480.26		
	Reason for Variance:	Coding for LHMS 2019 was billed to 2023 spring, and recharges were higher than projected, resulting in an overrun for the month.		
Measures		Units at Complete	RR	HPI
	Current Goal:	1053	54%	N/A
	Goal at Completion:	1053	54%	N/A
	Current Actual:	358	18%	N/A
	Estimate at Complete:	360	18%	N/A
	Variance:	693	36%	N/A
Other Measures	N/A			

Project Name	(MI CReSS (Year 3 & 4)) Michigan COVID-19 Recovery Surveillance Cohort Study (On Track)		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 458,145.00	Indirect Budget: 119,118.00	Total Budget: 577,263.00
Principal Investigator/Clients	Nancy Fleischer (U-M School of Public Health (SPH))		
Funding Agency	MDHHS - Releases 1 - 8		
IRB	HUM#: HUM00234617	Period of Approval: 6/15/2023-6/14/2028	
Project Team	Project Lead: Timothy Prand Budget Analyst: William Lokers Production Manager: Lisa J Carn Senior Project Advisor: Nicole G Kirgis Production Manager 1: Narine Verdiyan Production Manager 2:		
Proposal #	no data		
Description	<p>MI CReSS is a partnership between the University of Michigan School of Public Health (SPH) and the Michigan Department of Health and Human Services. It is a public health surveillance study to learn about Michiganders' experiences with COVID-19 using a representative sample of confirmed cases within the state. Using survey data, they plan to document sociodemographic inequities in COVID-19 testing, treatment, and recovery.</p> <p>SRO's involvement includes the administration of a Follow-up survey for respondents that completed a Baseline survey with the SPH team. Based on the sample information provided, we will be re-contacting approximately 3,995 respondents who have already completed (or are estimated) to complete the Baseline survey to administer the Follow-up survey.</p> <p>The Follow-up survey is estimated to be 45 minutes in length, and Respondents will be encouraged to complete the survey by web. However, SRO Interviewers will contact non-responders and conduct the interview over the telephone if the Respondents do not want to complete the survey on the web. HUM00181068 - Year 3 IRB Exempt - Budget:\$841,375 Total used:\$649,836 HUM00234617 - Year 4 - IRB approved - Budget:\$477,681</p>		
SRO Project Period	08/2021 - 09/2023		
Data Col Period	01/2022 - 07/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: 07/28/2023 DC Start: 09/14/2023 </div> <div> Pretest Start: Recruitment Start: 06/01/2023 GIT Start: SS Train End: 07/29/2023 DC End: 02/28/2025 </div> </div>		
Other Project Team Members	Bill Lokers: Financial Analyst Megan Hromco: Production Assistant Hueichun Peng: Technical Lead / WSMS db Programmer Peter Sparks: CAI Programmer (Blaise 5) Cheng Zhou: Web Component, ADT, Reports LihShwu Ke: DBA Architecture & Data Security Sarah Broumand: Data Manager Deb Wilson: Help Desk		
Other Project Name			
Sample Mgmt System	Web SMS		
Data Col Tool	Blaise 5		
Hardware	Laptop; Desktop		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Other (HSIP VISA Gift Card)		
Payment Method	NA		

Report Period	Apr, 2024 (MI CReSS (Year 3 & 4))		Implementing

Risk Level	On Track			
Monthly Updates	<p>Cohort 2</p> <ul style="list-style-type: none">- Release 1-8 is complete- Releases 9-16 launched 4/23/2024 for English and Spanish, 5/15 for Arabic<ul style="list-style-type: none">- The concern going forward is we have lost our Arabic IWER. In process of discussing options going forward.- Releases 9, 10, and 11 are in field with Releases 9 and 10 now available for reminder calling. <p>WSMS - We saw a slow down in response time between tabs within the WSMS interface but after informing Hueichun and Chen, they we able to resolve the issue.</p> <p>Looking to add 2 new tabs (Locating and Refusal) to make things easier for the TLs and IWERs - Specs coming soon.</p>			
Special Issues				
Cost as of May 16, 2024	Total Cost to Date (direct + indirect):			478,811.27
	Est Cost at Completion (E\$AC):			884,266.21
	Total Budget:			577,263.00
	Variance (Total Budget minus- E\$AC):			-307,003.21
	Reason for Variance:			Funding for Releases 9-16 has not been accounted for as of yet and once included it will net an underrun of about \$100k
Projections as of May 16, 2024	Dollars Projected for Month:			68,000.48
	Actual Dollars Used:			72,956.76
	Variance (Projected minus Actual):			-4,956.28
	Reason for Variance:			Respondent payments included a move of around \$4500 from Y3 to Y4. Don't fully understand why it moved but are looking into it. Also included staff backpay.
Measures		Units at Complete	RR	HPI
	Current Goal:	2100	77	3
	Goal at Completion:	3700	80%	6
	Current Actual:	2043	70.15%	6.32
	Estimate at Complete:	3600	75%	6.5
	Variance:	-100	-5%	.5
Other Measures	Targeting 80% of eligible Rs that completed the Main survey to complete the MoCA section in CATI. We are currently at 90% of those who are eligible. MoCA is currently .72 HPI			

Project Name	(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027 (On Track)		
Project Mode	Primary: Class SAQ Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 6,267,988.00	Indirect Budget: 3,510,072.00	Total Budget: 9,778,060.00
Principal	Richard Miech (SRC)		
Investigator/Clients			
Funding Agency	National Institute on Drug Abuse, one of the National Institutes of Health.		
IRB	HUM#: 00217920	Period of Approval: from 7/20/22 No CR	
Project Team	Project Lead: Rebecca Gatward Budget Analyst: Dean E Stevens Production Manager: Margaret Lavanger Senior Project Advisor: Gregg Peterson Production Manager 1: Production Manager 2:		
Proposal #	no data		
Description	<p>Since 1975 the MTF survey has measured drug and alcohol use and related attitudes among adolescent students nationwide. A nationally representative sample of survey participants report their drug use behaviors across three time periods: lifetime, past year, and past month. The survey is funded by the NIDA, a component of the National Institutes of Health (NIH), and conducted by the University of Michigan.</p> <p>It is based on two interconnected series of surveys using nationally representative samples:</p> <p>(a) self-administered annual in-school surveys of 8th, 10th, and 12th graders (~45,000) in 400 schools. Proctors (SRO interviewers) coordinate and administer the data collection in schools (either FTF or remotely without visiting the schools).</p> <p>(b) panels of high school graduates aged 19-30, 35, 40,45, 50, 55, and 60 (now primarily surveyed by web). Panel members aged 19-30 are invited to participate every other year/asked to complete a web survey and the older sample members are sent questionnaires (mail and web) at five-year interval. The MTF panel study has three parts - early in the year a newsletter is mailed to panel members. If the newsletter is returned (undelivered) locating effort targets these panel members and others who have not participated for X years. The web panel launches (web) in spring and in around June a telephone non-response effort begins for those invited to participate. The panel members are recruited from the 12th graders who participate in the base year study.</p> <p>Press releases and published results can be found here.. http://www.monitoringthefuture.org/</p>		
SRO Project Period	04/2022 - 03/2027		
Data Col Period	04/2022 - 03/2027		
Security Plan	Yes		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Hueichun Peng Technical Lead (WebSMS and Qualtrics programmer) Ed Green (+Brad Goodwin) 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		
Data Col Tool	Other (Qualtrics)		
Hardware	Laptop; Tablet; [UM cell] Phone		
DE Software	Other (Qualtrics)		
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	Apr, 2024 (MTF Base Year 2022_27)		Implementing
Risk Level	On Track		
Monthly Updates	April 2024 The first school survey was completed on 2/12. To date (17/5), 253 school surveys have been completed (24,265		

student surveys), survey dates have been scheduled at a further 35 schools and attempts are being made to set dates at three more schools. Overall student response rate is 85% (8th grade RR 88%, 10th grade RR 89% and 12th grade RR is 78%).

Max has been identified as a back-up for Hueichun. He will begin working alongside Hueichun from April to develop an understanding of the MTF technical systems and tasks.

Special Issues

Cost as of May 16, 2024	Total Cost to Date (direct + indirect):	2,491,363.82
	Est Cost at Completion (E\$AC):	6,945,716.43
	Total Budget:	9,778,060.00
	Variance (Total Budget minus- E\$AC):	2,832,343.57
	Reason for Variance:	<p>Projections for Funding period 2022 – 2027 (latest client report has been uploaded to MPR)</p> <p>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.</p> <p>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).</p> <p>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.</p>

Projections as of May 16, 2024	Dollars Projected for Month:	202,723.36
	Actual Dollars Used:	222,866.75
	Variance (Projected minus Actual):	-20,143.39
	Reason for Variance:	Source of the slight variance is primarily due to the salary adjustments for some staff.

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

Other Measures

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

Report Period	Apr, 2024 (MTF Early Panel Pilot)		Implementing
Risk Level	On Track		
Monthly Updates	1. Management - Prod Test completed, signed off for production - Monitoring the production 2. System - WebSMS running for production 3. Data Collection -Production started - System will automatically send the survey to R upon receiving parent/guardian's consent -Production Stats: as of 04/30/2024: Total completes=9		

Special Issues				
Cost as of Apr 30, 2024	Total Cost to Date (direct + indirect):			51,368.68
	Est Cost at Completion (E\$AC):			300,533.04
	Total Budget:			288,529.00
	Variance (Total Budget minus- E\$AC):			-12,004.04
	Reason for Variance:			The variance is a result of all SRO MTF team members with a Survey Specialist or Survey Director title have received a market rate salary adjustment, retroactive to February 2024. This has a huge impact on the projections/budget.
Projections as of Apr 30, 2024	Dollars Projected for Month:			15,363.28
	Actual Dollars Used:			16,581.28
	Variance (Projected minus Actual):			-1,218.68
	Reason for Variance:			The overrun was the result of all MTF team members with a Survey Specialist or Survey Director title have received a salary increased although the staff charged less hours than 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	Megan Patrick (UM-SRC)		
Investigator/Clients			
Funding Agency			
IRB	HUM#: 00217920		Period of Approval:
Project Team	Project Lead: Donnalee Ann Grey-Farquharson		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lloyd Fate Hemingway		
	Senior Project Advisor: Rebecca Gatward		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>This project is a continuation of MTF Illume Web 2021.</p> <p>PI staff will edit and test 12 survey versions, all previously programmed in Illume by SRO. SRO will further test the surveys as part of the systems integration process. All 12 surveys will be launched in 2021. After testing is complete, SRO will launch the 2021 Web survey data collection with an estimated sample size of 20,000 cases identified by the Principal Investigator who will deliver the contact information including e-mail address to SRO. The Web survey data collection will replace aspects of the standard mail-based data collection. Both the separately funded Winter Location calling effort and Non-Response follow-up calling will include this sample – with the calling effort being integrated with the standard MTF activities.</p>		
SRO Project Period	01/2022 - 03/2027		
Data Col Period	04/2022 - 10/2026		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Rebecca Gatward (SPA), Donnalee Grey-Farquharson, Lloyd Hemingway, Dave Dybicki, Max Malholtra, Hueichun Peng, Shaowei Sun, Peter Sparks, Ashwin Dey, Hongyu Johnson, Brad Goodwin, Edward Green.		
Other Project Name	MTF		
Sample Mgmt System	Web SMS		
Data Col Tool	Other (Qualtrics)		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	ISR Group (MTF Staff)		
Payment Type	Check, prepaid; Check, post		
Payment Method	Other (MTF Staff handles this)		

Report Period	Apr, 2024 (MTF Panel 2022-27)		Implementing
Risk Level	On Track		
Monthly Updates	1. Management - Prod Test completed, signed off for production - Monitoring the production - 2. System - QC codes for production related functionalities - WebSMS running for production - Preparing NR sample loading for May 2024 3. Data Collection -Email invitations went out on 4/17 - beginning of data collection -Production Stats: as of 04/30/2024: Accumulated Total=4026 (RR=20.74%)		

- 4. Winter Location
- N/A
- 5. NR Production/Calling-N/A
- 6. RLM: Testing complete

Special Issues

Cost as of Apr 30, 2024	Total Cost to Date (direct + indirect):	1,458,390.08
	Est Cost at Completion (E\$AC):	4,018,656.82
	Total Budget:	3,895,217.00
	Variance (Total Budget minus- E\$AC):	-123,439.82
	Reason for Variance:	The total project amount includes MTF Web Illume as well as Non-Response Calling and Winter Location project. The variance, over the next 3 years, is a result of all SRO MTF team members with a Survey Specialist or Survey Director title have received a market rate salary adjustment, retroactive to February 2024. This has a huge impact on the projections/budget.

Projections as of Apr 30, 2024	Dollars Projected for Month:	41,029.74
	Actual Dollars Used:	44,711.60
	Variance (Projected minus Actual):	-3,681.86
	Reason for Variance:	The overrun was the result of all MTF team members with a Survey Specialist or Survey Director title have received a salary increased although the staff charged less hours than projected.

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

Other Measures

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

Report Period	Apr, 2024 (NDWS)	Planning	
Risk Level	On Track		
Monthly Updates	<p>April activities:</p> <p>* Began collaborations with our survey data collection partners (DLH and RTI) to begin pre-production activities on the 4 parts of the project. RTI will collect data from nursing homes, assisted living communities, and community clinicians; DLH will collect home care agency data.</p>		

* Work continued on sample frame development for the Assisted Living (ALF) survey and the Home Care (HC) surveys, including contacting agencies to collect missing data required for the sample frame (e.g., number of beds, contact information). Data from all states in ALF replicates 1 & 2 (needed for Year 1) was confirmed. Work on replicates 3-5 will be paused while the team prepares the Year 1 frame for sample selection and works on other sampling tasks.

* Cognitive interviews to test the questions from the staff, administrator, and clinician surveys wrapped on April 29. Interviews were conducted via Zoom with respondents with a diverse range of respondent experiences. In total, 29 interviews were completed. Results from the interviews is being synthesized and shared with the research team to make modifications to the survey instruments.

* Established a team to work on specifying the survey instruments and develop codebooks, once questions are finalized to ensure data harmonization across surveys and data collection partners.

Special Issues

Cost as of May 16, 2024	Total Cost to Date (direct + indirect):	296,989.67
	Est Cost at Completion (E\$AC):	4,834,549.24
	Total Budget:	6,750,973.00
	Variance (Total Budget minus- E\$AC):	1,916,423.76
	Reason for Variance:	Efforts have not yet been fully projected for the project.
Projections as of May 16, 2024	Dollars Projected for Month:	103,065.47
	Actual Dollars Used:	86,292.58
	Variance (Projected minus Actual):	16,772.89
	Reason for Variance:	

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

Other Measures

Project Name	(PR-PSID) Puerto Rico Panel Study of Income Dynamics (Some Concerns)		
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 828,581.00	Indirect Budget: 464,004.00	Total Budget: 1,292,585.00
Principal	Narayan Sastry (University of Michigan)		
Investigator/Clients	Elizabeth Fussel (Brown University)		
Funding Agency	NICHD, with supplemental funding being sought from NIA		
IRB	HUM#: HUM00197300	Period of Approval: 4/5/2022-3/22/24	
Project Team	Project Lead: Camila Kendall		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Camila Kendall		
	Production Manager 2:		
Proposal #	no data		
Description	SRO will work with the PIs and a local survey firm in Puerto Rico, Estudios Técnicos (ETI), to develop a sample frame, sample design, questionnaire and data collection protocols for both pilot data collection (in 2022) and baseline data collection (in 2023). DMSS will provide assistance with sample design and implementation, responsive design, panel maintenance issues, and creation of sample weights. SRO will update the PSID-21 Spanish instrument for use specifically in PR. SRO will assist with the preparation of training materials for Listing training, Pretest and Main Data collection and will travel to PR to be on-site for these trainings. SRO will define reports for production and quality control monitoring that will be programmed through the SurveyTrak system, and train the research team on using these reports. All data will be collected by ETI's interviewers in PR and will be encrypted and transmitted daily via SurveyTrak to a secure SRC server. SRO will also assist with data processing.		
SRO Project Period	01/2022 - 12/2023		
Data Col Period			
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 10/01/2021</div><div>Pretest End: 03/11/2024</div><div>Staffing Complete:</div><div>SS Train Start: 01/31/2024</div><div>DC Start:</div></div> <div><div>Pretest Start: 02/05/2024</div><div>Recruitment Start:</div><div>GIT Start: 01/30/2024</div><div>SS Train End: 02/02/2024</div><div>DC End:</div></div>		
Other Project Team Members	Shonda Kruger-Ndiaye & Camila Kendall -- Co-Project Leads Raphael Nishimura -- Sampling Tech Team: Marsha Skoman (Tech Lead & STrak Programmer), Jude Purillo (Lead Blaise Programmer), Kelly Lieske (Programming Support), Valyn Dall (Data Manager), Jennie Williams (Data Management Support), Emmanuel Ellis (Help Desk), Cheng Zhou (Database setup), Lihshwu Ke (Database set up) Spanish Testing and Project Support: Liliana Grueber, Alondra Ortiz-Ortiz, Mabel Hernandez Duran (PSID Temp)		
Other Project Name			
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop		
DE Software	N/A		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	Other (ETI (Puerto Rican Survey Firm))		
Payment Type	Check, post (Varies by study phase); Cash, post (Varies by study phase)		
Payment Method	Other (Via ETI Systems)		

Report Period	Apr, 2024 (PR-PSID)		Initiation
Risk Level	Some Concerns		
Monthly Updates	PIs submitted NIA over the cap submission -- if approved, U-M will resubmit the original NIA proposal in July. NIA funding would increase first wave sample size, add multiplicity, fund a second wave of data collection, and fund an HCAP wave. PIs have been discussing a possible funding proposal with Americorps. Funding proposal would have a five year timeline, potentially ~200K-300K annually. Funding would be via contract. If funding is awarded, SRO's preference is that the PIs use these funds for non-SRO work.		

Held final debriefing meeting with ETI management. SRO will send ETI the selected sample blocks so that they can begin reviewing and can ensure that they are staffed appropriately. Meetings with ETI and PIs are on-hold until pre-production for MDC ramps back up in the fall.

PR-PSID & Core coordinating on next steps in instrument development decision making. Core PI sign off needed before Core25 specs are delivered to the programmer (by late May). PR-PSID management attended the Core PI meeting on 5/1 to discuss the PR-PSID & Core integration plan. As of 5/16, Core PIs have made a final decision that we will not integrate the instruments this wave, but are open to revisiting the topic if funding is awarded for the second wave.

PR-PSID needs to implement all of the Core changes that occurred after the instruments split in June 2023. Additional projections will be added for the programmer, and Spanish tester for this work scope next month. Additionally, some minimal management hours will be added to coordinate and oversee this work.

Special Issues	Overrun significantly increased after rate increases due to ~5,500 hours projected at the SSI level for Post Collection Processing. Much of the Post Collection Processing that is planned is new for SRO -- we do not yet know whether so many hours will be required for PCP, and at what level the work will ultimately be staffed at.			
Cost as of May 16, 2024	Total Cost to Date (direct + indirect):			596,139.65
	Est Cost at Completion (E\$AC):			1,492,606.67
	Total Budget:			1,292,585.00
	Variance (Total Budget minus- E\$AC):			-200,021.67
	Reason for Variance:	Projected cost to complete decreased by ~1K between the March & April reports -- biggest driver was decrease in fringe benefits category.		
Projections as of May 16, 2024	Dollars Projected for Month:			3,130.59
	Actual Dollars Used:			4,084.37
	Variance (Projected minus Actual):			-953.78
	Reason for Variance:	Actuals for programmers were higher than projected -- programmers consulted on PR-PSID & Core instrument integration. Will add additional projections for programmer & tester next month -- exact projections still TBD.		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(PSID 2025 OCU) PSID 2025 Online Contact Update (On Track)		
Project Mode	Primary: Web	Secondary: Mail	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 52,360.00	Indirect Budget: 29,326.00	Total Budget: 81,686.00
Principal	Katherine McGonagle (PSID)		
Investigator/Clients	Noura Insolera (PSID)		
Funding Agency	NSF		
IRB	HUM#: HUM00062417		Period of Approval:
Project Team	Project Lead: Camila Kendall		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	SRO will update the Blaise and MSMS specifications from 2022 and program and test a Blaise 5 web instrument and web portal with authentication that allows PSID and TAS respondents to confirm or update their contact information via an online survey. SRO will provide PSID authenticated links so that they can merge QR codes that will be embedded in a mailing sent to the respondents. SRO will also program and send the respondents up to three email reminders with an authenticated link. This project is under the PSID Core IRB.		
SRO Project Period	04/2024 - 05/2025		
Data Col Period	07/2024 - 12/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Shonda Kruger-Ndiaye -- PSID Suite Lead Rachel Orłowski -- PSID Survey Director Daric Throne -- MSMS Spec Lead James Rodgers -- MSMS Lead Karl Dinkelmann -- Blaise Lead Jeffrey Smith -- TSG Lead Jude Perillo -- Blaise Programmer Darnell Christian -- MSMS Set Up Programmer Edward Green -- Data Manager Rose Zdybel -- Data Management Support Laura Yoder -- Archiving Ivanna Iavorska-Em -- Financial Analyst		
Other Project Name			
Sample Mgmt System	MSMS		
Data Col Tool	Blaise 5		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	ISR Group (PSID)		
Payment Type	Check, post (\$10); Other (electronic, post--JP Morgan)		
Payment Method	NA		

Report Period	Apr, 2024 (PSID 2025 OCU)		Planning
Risk Level	On Track		
Monthly Updates	SRO project kick-off held on 4/11. Reviewed key assumptions with PI: SRO will program the Blaise 5 Web survey based on the 2022 specs. Very minimal changes to Blaise & MSMS specs. PSID will provide the Core and TAS preload in mid-July, PSID will mail the address update card with the authenticated QR code in late July/early August. SRO will send up to 3 email reminders starting in mid-September.		

Blaise changes from last wave: PSID PIs are considering adding a mode preference question. PI requested format changes so that the Reference Person & Spouse partner information is on the same page. PI decided that we will not add fields to capture CP information this wave.

MSMS changes from last wave: Programming the email templates with fillable subject lines -- will allow the project the flexibility to resend the same email content with new a variety of subject lines.

Special Issues	PG was not established until 5/1 -- shortcodes were not available to charge until 5/6.		
Cost as of	Total Cost to Date (direct + indirect):		0.00
	Est Cost at Completion (E\$AC):		0.00
	Total Budget:		81,686.00
	Variance (Total Budget minus- E\$AC):		0.00
	Reason for Variance:	Expecting very small underrun (~\$500) -- actuals in tech categories expected to be lower than projected due to minimal spec changes.	
Projections as of	Dollars Projected for Month:		0.00
	Actual Dollars Used:		0.00
	Variance (Projected minus Actual):		0.00
	Reason for Variance:	Shortcodes were not available in April -- all charges were to the subunit's OH account. Financial Analyst was not able to provide actuals to-date.	

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: 3,045,535.57	Indirect Budget: 1,705,467.00	Total Budget: 4,751,002.57
Principal	Narayan Sastry (SRC)		
Investigator/Clients			
Funding Agency			
IRB	HUM#: HUM00166316		Period of Approval:
Project Team	Project Lead: Piotr Dworak		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager: Sarah Crane		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>A 2023 wave of the Childhood Development Supplement (CDS) is going to be conducted in two phases. Phase 1: from September 2023 – May 2024 and Phase 2: from June 2024 - January 2025. The sample for CDS is comprised of the PSID-eligible children (ages 0 -17) from the Core 2023 families we interview and their primary caregivers. Approximately 3,700 families will be included, with some Core families containing several CDS children. As part of the CDS Phase 1, families are asked to complete phone coverscreen and PCG interviews followed by mixed Adolescent 12 - 17 phone/web interview (including an IVR component in phone mode). In Phase 2 families will be visited in person (where possible) and asked to complete Child 8 - 11 interviews (via Video if out of area), provide physical measurements, educational assessments, saliva collection, time diaries, school and birth record linkage forms. CDS interviewing will be conducted by a mix of SSL and Field interviewers. Coverscreen and PCG interviews will be handled by SurveyTrak and Blaise 4.8, Adolescent interviews will be handled by MSMS and Blaise 5.</p>		
SRO Project Period	08/2022 - 01/2025		
Data Col Period	09/2023 - 01/2025		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 10/01/2022 Pretest End: 05/14/2023 Staffing Complete: 09/01/2023 SS Train Start: 01/18/2024 DC Start: 01/22/2024 </div> <div> Pretest Start: 04/24/2023 Recruitment Start: 07/01/2023 GIT Start: 12/12/1999 SS Train End: 01/22/2024 DC End: 07/31/2024 </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	SurveyTrak; MSMS; Other (WSMS)		
Data Col Tool	Blaise 4.8; Blaise 5; Other (IVR)		
Hardware	Laptop; Desktop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Time Diary Coding)		
QC Recording Tool	DRI-CARI; Camtasia		
Incentive	Yes, R; Yes, INF; Yes, Other (PCG)		
Administration	SRO Group		
Payment Type	Check, post (75 + interventions); Other (ePay)		
Payment Method	Check through other system (PSID RAPS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (PSID RAPS)		

Report Period	Apr, 2024 (PSID CDS 2023)		Implementing
Risk Level	On Track		
Monthly Updates	CDS data collection lin in week 18. Our current goals and progress: -- CS: completed 2,013, 62%. CS is stalling compared to past waves (69% in 2021 and 63% in 2019). Time of year (upcoming summer), web preference among PSID respondents are investigated as possible reasons for the slowdown out of sync with prior waves. -- PCG: completed 1566 of the planned 2756 (assuming 90% CS and 95% PCG completion). PCG interviews are going well with 77% of active sample completed compared with 75% in 2021 (comparison with 2019 more difficult due to changes in protocol). -- Adolescent: completed 706 of the planned 1151 (assuming 90% CS, 95% PCG, and 85% PCG consent rate). Adolescent completion this wave benefits from the new Web mode (69% of Adolescents completed compared to		

47% in 2021. 84% of IVR interviews completed with Adolescents eligible for IVR (along with the phone interview) -- compared to 84% overall in '21 (which required a dedicated IVR follow up).

Staff:

Staffing remains unchanged:

-- 47 interviewers + 2 locators (no attrition after the training) (

-- we see some impact of sharing on hours, CDS staff is shared with other projects (PSID Saliva, MTF, BFY, etc.)

Sample:

All sample but the TAS overlap cases had been released:

-- Release 1: 2260 (34 Spanish)

-- Release 2: 759 (66 Spanish)

-- Release 3: 143 (Just released March 21)

-- Release 4: ~ 41 cases overlapping with TAS and TAS not yet completed.

Phase 2 update:

SRO delivered two ballpark proposals for Phase 2. Ballparks assumed at home visits with the full scope (WJ-IV, TDs, Saliva, physical measures, etc.) to 100% or 50% of the sample. The option with lowest cost came to \$2.5M and was approximately \$0.5M higher than available funding. Discussions of revised approach are ongoing. Pls removed WJ-IV from the scope and advised to focus primarily on TD collection. We are currently exploring cost options assuming 20% of families will participate in mail-out / mail-back protocol, allowing for reduction of staff, and emphasizing travel. Phase 2 data collection would still kick-off in the Fall and start by utilizing current available OS through November and pick up other OS who may become available after ANES.

Special Issues

Cost as of May 16, 2024	Total Cost to Date (direct + indirect):	1,951,985.64
	Est Cost at Completion (E\$AC):	4,148,630.36
	Total Budget:	4,751,002.57
	Variance (Total Budget minus- E\$AC):	602,372.21
	Reason for Variance:	We continue underrunning monthly due to lower tech needs and management / production team getting absorbed by other projects. The production hours / interviewer time had also come in below projections.

Projections as of May 16, 2024	Dollars Projected for Month:	596,166.00
	Actual Dollars Used:	416,157.81
	Variance (Projected minus Actual):	180,008.19
	Reason for Variance:	We continue underrunning monthly in PDMG, TSG, and now in iwer hours as well.

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

Other Measures CDS tracks goals for 3 different sample sizes - the goals are reported in the text write up above.

Project Name	(PSID TAS 2023) Transition to Adulthood within its Life Course & Intergenerational Family Context (On Track)		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 934,249.00	Indirect Budget: 523,179.00	Total Budget: 1,457,428.00
Principal Investigator/Clients	Narayan Sastry (U-M PSC SRC)		
Funding Agency			
IRB	HUM#: 00112629	Period of Approval:	
Project Team	Project Lead: Elizabeth Ohryn Budget Analyst: Ivanna Iavorska-Em Production Manager: Narine Verdiyan Senior Project Advisor: Stephanie A Chardoul Production Manager 1: Daric Thorne Production Manager 2:		
Proposal #	no data		
Description	<p>TAS 2023 is the 10th Wave of TAS study, part of the PSID Suite of projects.</p> <p>Approximately 3,000 youth aged 18 - 28 years who are part of families who participate in the ongoing Panel Study of Income Dynamics (PSID) are invited to take part in a 60-minute web survey. In 2023, all respondents go through the same sequential treatment - non-responders to web survey are called as part of the non-response follow up. Respondents will be offered a up to \$145 for completing the interview which includes a \$75 base payment and possible other interventions. Phone interviews will be completed by Survey Research Center Survey Services Lab (SSL) interviewers.</p>		
SRO Project Period	05/2023 - 07/2024		
Data Col Period	10/2023 - 05/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 05/01/2023 Pretest End: Staffing Complete: SS Train Start: 10/02/2023 DC Start: 10/03/2023 </div> <div> Pretest Start: Recruitment Start: 07/23/2023 GIT Start: 10/03/2023 SS Train End: 10/06/2023 DC End: 06/01/2024 </div> </div>		
Other Project Team Members	PSID Suite SRO Lead - Shonda Kruger-Ndiaye; TSG Tech Leads - Jim Rodgers, Laura Yoder, and Jeff Smith; Data Manager - Rose Zybel; Blaise Programmer - Youhong Liu; Portal - Jude Perillo MSMS Programmers - Pam Swanson and Darnell Christian; Help Desk Support - Kyle Goodman; Testing Coordinator and project support - Camila Kendall; Project/Production Support - Jaime Koopman, Sarah Crane, Xiomara Lorenzo-Guerra & Liliana Grueber; Reporting - Piotr Dworak and Ruyi Chen		
Other Project Name			
Sample Mgmt System	MSMS		
Data Col Tool	Blaise 5		
Hardware	Laptop; Desktop; [UM cell] Phone		
DE Software	NA		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	SRO Group		
Payment Type	Check, post (\$75); Other (ePay)		
Payment Method	Check through other system (PSID RAPS); Other (ePay)		

Report Period	Apr, 2024 (PSID TAS 2023)		Implementing
Risk Level	On Track		
Monthly Updates	<p>Summary of April Activities</p> <p>Production</p> <p>- TAS production slowed in April. While still ahead of the cumulative goal weekly completes were slightly below goal three out of the four weeks in April. This slowdown was not expected given two the NMI mailing that went out to all releases and the middle wave offer to Rels 3 and 4.</p> <p>- The data collection team continues to focus in on hitting the contact protocol, which is 2 calls/2 texts/2 emails each week.</p> <p>Management</p>		

-TAS team is busy planning for End Game which starts for all releases on May 1. The TOA will increase by \$40 for all cases to a total of \$120. End game will include 3 mailings to all cases and 1 mailing to cases without valid cell or emails. Planned text and email

Staffing and Training

- TAS is down one interviewer. The team now has 27 people. 21 interviewers, 3 TLs, 1 TLCs and 2 Locators.

Technical

- Endgame templates and the communication sequence is programmed, tested and ready for End at the start of next month.

- The project continues to see an increase in time for the rules to run updating the communication sequence. The overnight process starts around 2 AM and in some cases takes until 1 or 2 PM in the afternoon (11 or 12 hours) to update to the next sequenced message.

Special Issues

Cost as of May 16, 2024	Total Cost to Date (direct + indirect):	1,081,994.46
	Est Cost at Completion (E\$AC):	1,415,067.74
	Total Budget:	1,457,428.00
	Variance (Total Budget minus- E\$AC):	42,360.26
	Reason for Variance:	Technology and data collection staff costs were lower than projected with some allocations removed or reduced.
Projections as of May 16, 2024	Dollars Projected for Month:	178,175.90
	Actual Dollars Used:	161,168.21
	Variance (Projected minus Actual):	17,007.69
	Reason for Variance:	Tech costs came in lower than projected.

Measures		Units at Complete	RR	HPI
	Current Goal:	2225	80.2%	
	Goal at Completion:	2418	89%	3.7
	Current Actual:	2227	80.3%	3.1
	Estimate at Complete:			3.7
	Variance:			

Other Measures

Project Name	(PSID23) Panel Study of Income Dynamics Core 2023 (On Track)		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 6,235,802.00	Indirect Budget: 0.00	Total Budget: 6,235,802.00
Principal Investigator/Clients	Katherine McGonagle (UM-SRC-PSID) Narayan Sastry (UM-SRC-PSID) Esther Friedman (UM-SRC-PSID)		
Funding Agency			
IRB	HUM#: HUM00062417		Period of Approval: 3/22/22-3/21/24
Project Team	Project Lead: Rachel Anne Orlowski Budget Analyst: Ivanna Iavorska-Em Production Manager: Stacy Quisenberry Senior Project Advisor: Stephanie A Chardoul Production Manager 1: Daric Thorne Production Manager 2: Shonda R Kruger-Ndiaye		
Proposal #	no data		
Description	<p>The Panel Study of Income Dynamics (PSID--also known to Respondents as the Family Economics Study or FES) is a longitudinal survey of several thousand individuals and their families, carried out since 1968 and conducted every two years. The sample is comprised of respondents from the 4,800 original families as well as new (immigrant) sample added in 1997/1999 and 2017/2019. The total 2023 sample size will be approx. 11,200, with approx. 9,650 completed interviews expected. Most of the information collected is about family composition and changes (marriages, divorces, births, deaths, people moving in and out); income sources and amounts; employment and pensions; and wealth. There are also questions about housing; education; vehicles; health; fertility; COVID-19; and money spent on food, healthcare, and school. The main focus is on how these family composition and financial factors interact with each other and how they change over time. The survey will be administered via web and telephone, with the expectation that more surveys will be completed via web than telephone (which will be a first for the study).</p> <p>During the 2023 wave, saliva samples will be collected for the first time on PSID Core. The Core interview must be completed to be eligible for saliva collection. Saliva sample participants that are eligible for collection during Core are adults related to Child Development Supplement (CDS) children but do not live with them. Interviewers will be trained on both the interview and saliva collection protocols. Both data collection efforts will be managed in the same MSMS project.</p> <p>The 2023 waves of CDS and the Transition into Adulthood (TAS) will follow PSID Core data collection. CDS and TAS eligibility is dependent upon completion of PSID Core.</p>		
SRO Project Period	03/2022 - 09/2024		
Data Col Period	03/2023 - 04/2024		
Security Plan	NA		
Milestones	Pre Production Start: 03/01/2022 Pretest End: 10/31/2022 Staffing Complete: 04/21/2023 SS Train Start: 03/08/2023 DC Start: 03/23/2023 Pretest Start: 10/11/2022 Recruitment Start: 09/19/2022 GIT Start: 06/05/2023 SS Train End: 06/11/2023 DC End: 04/30/2024		
Other Project Team Members	TSG Tech Leads - Jim Rodgers, Jeff Smith, & Karl Dinkelmann; Data Manager - Brad Goodwin & Ed Green; 68ID Site Programmer - Ashwin Dey; Blaise Programmer - Jude Perillo; MSMS Programmers - Pam Swanson & Darnell Christian; Self Scheduler Programmer - Peter Sparks; Help Desk - David Bolt, Andrea Pierce, & Deb Wilson; Production Tech Support - Sarah Broumand; Testing Coordinator - Camila Kendall; SSL Production Manager: Carolyn Vieira-Martinez; DCO Production Manager: Lorraine Bird; Saliva Project Manager: Mark Nathin; Project/Production Support - Saujanya Acharya, Mat Luna, Janet McBride, & Xiomara Lorenzo-Guerra; Reporting, Mapping, & Sample Assignment - Ji Qi & Wen Chang		
Other Project Name	PSID Core 2023		
Sample Mgmt System	MSMS		
Data Col Tool	Blaise 5		
Hardware	Laptop; [UM cell] Phone		
DE Software	N/A		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, Other (Locator, Proxy)		
Administration	ISR Group (PSID)		
Payment Type	Check, post (Varies); Cash, post (Varies); Other (electronic, post--JP Morgan)		
Payment Method	Check through other system (PSID will handle check & e-payment via RAPS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (PSID will handle check & e-payment via RAPS)		

Report Period	Apr, 2024 (PSID23)		Implementing	
Risk Level	On Track			
Monthly Updates	<p>Summary of April 2024 Activities</p> <p>Interview PSID staff alerted us to errors in the FPS data. SRO began investigating and identified that remark data from one SID had been copied to other SIDs that were synced by an interviewer at the same time. 437 comments were duplicated across 84 SIDs. SRO provided a file to PSID with the affected SIDs and their corrected remark data on 4/29. Still working on resolving issues with isVisited values.</p> <p>Saliva Collection Visited 429 FUs. Made FTF contact w/ 39% and collected samples from 47% of those we reach. Budget assumed 100% participation from those we visit. Submitted ORIO on 4/18. Unable to locate incomplete consent that we logged as received. Interviewer effort ended on 4/30--date of third and final end game. Ann Arbor follow-up to those requesting resends and those who provided invalid samples/consents continues. Overall: 26% of participants provided saliva samples.</p>			
Special Issues	Saliva data collection (including FTF visits) started later than originally planned. Saliva FTF RR short of budgeted target (44%).			
Cost as of May 20, 2024	Total Cost to Date (direct + indirect):		5,543,175.08	
	Est Cost at Completion (E\$AC):		5,681,303.26	
	Total Budget:		6,235,802.00	
	Variance (Total Budget minus- E\$AC):		554,498.74	
	Reason for Variance:	Main driver of underrun: Less interviewer effort & associated recharges/fees. 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 May 20, 2024	Dollars Projected for Month:		185,233.21	
	Actual Dollars Used:		153,057.66	
	Variance (Projected minus Actual):		32,175.55	
	Reason for Variance:	Greatest driver of underrun: FTF travel (~\$15K). Note: Unable to separate Core IDC costs from Contact Update IDC costs. Cost values only reflect Direct Costs.		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:	9646	89%	6.58
	Current Actual:	9189	86%	5.59
	Estimate at Complete:			
	Variance:	457	3%	0.99
Other Measures	<p>Notes for Measures Above: From Dashboard. Units Completed = 9189 iws (2476 CATI--27%, 6713 web--73%). Sample Invited = 10,928.</p> <p>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.</p>			

Project Name	(SCA 2024) Surveys of Consumer Attitudes (On Track)		
Project Mode	Primary: Mail Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 696,383.00	Indirect Budget: 0.00	Total Budget: 696,383.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: William Keating		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lisa J Carn		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations.</p> <p>The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 600 interviews.</p>		
SRO Project Period	01/2024 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div><div>Pre Production Start:</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start: 01/02/2024</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End: 06/30/2024</div></div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	SMS		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; Desktop; [UM cell] Phone		
DE Software	NA		
QC Recording Tool	DRI-CXM		
Incentive	Not used		
Administration	N/A		
Payment Type	N/A		
Payment Method	N/A		
=====			
Report Period	Apr, 2024 (SCA 2024)		Initiation
Risk Level	On Track		
Monthly Updates	<p>SCA April 2024 began as scheduled on Wednesday 03/27/2024, and ended two-days early, Saturday 4/20/2024.</p> <p>We completed 605 interviews in April 2024 (324/181/100), 5 interviews above our goals of 600 (320/180/100).</p> <p>The cumulative HPI for the month was 3.41 (.21 higher than our budgeted goal of 3.20), which represents a slight increase (+0.1) from the March 2024 study month.</p>		
Special Issues			
Cost as of May 16, 2024	Total Cost to Date (direct + indirect):	444,903.29	
	Est Cost at Completion (E\$AC):	690,754.91	
	Total Budget:	696,383.00	

Reason for Variance:	The current cost report shows a projected underrun for CY2024 of \$5,295.70. This figure represents an increase (\$3,656.95) in the projected underrun. A reduction in the projected hours for Project Managers, specifically those performing transcription tasks, and CAI programming in May 2024 and June 2024, contributed to the projected reduction in cost.
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Projections as of May 16, 2024	Dollars Projected for Month:	120,157.18
	Actual Dollars Used:	132,637.61
	Variance (Projected minus Actual):	-12,480.43

Reason for Variance:	SCA is over budget for the April 2024 study month due to retroactive costs for project management, as well as increased interviewer costs for March that were processed after the conclusion of the calendar month.
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Measures		Units at Complete	RR	HPI
	Current Goal:	600		3.2
	Goal at Completion:	600		3.2
	Current Actual:	605		3.41
	Estimate at Complete:	605		3.41
	Variance:	+5		+0.21

Other Measures

Project Name	(SRS 2021) Social Relations 2023 (Some Concerns)		
Project Mode	Primary: Face to Face	Total of Modes: 1	
Project Type	Sponsored Projects		
Budget	Direct Budget: 3,767,057.11	Indirect Budget: 2,109,553.00	Total Budget: 5,876,610.11
Principal	Toni Antonucci (ISR)		
Investigator/Clients	Kristine Ajrouch (ISR)		
	Laura Zahodne (ISR)		
Funding Agency	NIH		
IRB	HUM#:		Period of Approval:
Project Team	Project Lead: Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Taghreid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 3400 interviews with respondents aged 35 years or older residing in the tri-county area of Southeast Michigan (Wayne, Oakland and Macomb counties) and 244 interviews with original Social Relations panel sample members aged younger than 65 years of age. The project involves screening up to 6900 new sample lines., with one selected respondent per household. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements (height, weight, blood pressure, grip strength) and saliva collection. The SRS 2023 project will use the same instrument programmed for the D-Amp project, with the only new programming being that for a screener. The screener will be translated into Arabic. No informant or proxy interview is included in the project scope. Interviews will be conducted in English or Arabic.		
SRO Project Period	09/2021 - 05/2023		
Data Col Period	05/2023 - 04/2024		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 09/01/2022</div><div>Pretest End:</div><div>Staffing Complete: 04/10/2023</div><div>SS Train Start: 05/18/2023</div><div>DC Start: 05/30/2023</div></div> <div><div>Pretest Start:</div><div>Recruitment Start: 02/01/2023</div><div>GIT Start: 05/16/2023</div><div>SS Train End: 05/25/2023</div><div>DC End: 12/31/2024</div></div>		
Other Project Team Members	Taghreid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall		
Other Project Name	Social Relations 2022, DAWN, Social Relations 2023		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	DRI-CARI		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Cash, prepaid (\$75 respondent, \$25 informant); Other (\$2 screener incentive)		
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)		

Report Period	Apr, 2024 (SRS 2021)	Implementing
Risk Level	Some Concerns	
Monthly Updates	<p>BLUF We successfully training 27 screeners in April. The screeners have exceeded expectations in terms of productivity and effectiveness. That combined with the on-staff interviewers working more hours than projected (likely due to the slow-down on D-AMP during Ramadan) has meant that SRS production is ahead of where we projected it to be, even while we continue to experience attrition among the interviewers trained in the full study. We believe that field interviewing may be completed early (August or early September 2024) instead of running through the end of the year. Hours per interview and hours per screen are holding steady. Nevertheless, SRS will need to be monitored carefully to ensure that we do not overspend the budget. We will continue to monitor production and costs and will work to the budgeted dollar amount for the study.</p>	

As a reminder, the PIs affirmed the new goal of 1100 new sample cases and 244 panel cases on March 14, 2024. A low-MENA sample release was put into the field on April 19. We hope that this will get us to the goal of 1100

sample cases. In addition, the panel sample was released on April 11. Screening continues to be very difficult, with interviewers continuing to run into hostility in low-MENA areas. That said, the new interviewers appear to be effective in converting some cases in older releases to completes.

While SRO planned to move forward with a screener end-game protocol, and development of a web application to gather household rosters, work and roll-out is on hold at the request of the interviewers. Interviewers reported feeling overwhelmed with new protocols, including calling on the panel cases. Since production is moving ahead more quickly than anticipated, we are holding on new protocols.

We had planned to conduct an interviewer training in late May/early June to train the new screeners in the full protocol. That training was put on hold due to uncertainty about D-AMP funding. We lost our training venue, and are now trying to re-establish a contract for training. This will help make up for attrition or allow us to consolidate low-producing interviewers.

Special Issues

Cost as of May 16, 2024	Total Cost to Date (direct + indirect):	3,370,084.87
	Est Cost at Completion (E\$AC):	3,370,984.87
	Total Budget:	5,876,610.11
	Variance (Total Budget minus- E\$AC):	0.00
	Reason for Variance:	The cost reports were not updated after we made updates to the projections. We are anticipating using the full project budget for interviewing.
Projections as of May 16, 2024	Dollars Projected for Month:	397,428.57
	Actual Dollars Used:	345,800.47
	Variance (Projected minus Actual):	0.00
	Reason for Variance:	Hosting cost projected to hit in the month of May was not invoiced.

Measures		Units at Complete	RR	HPI
	Current Goal:	1100 new/244 panel		
	Goal at Completion:	1100 new, 244 panel		
	Current Actual:	1000 new/29 panel	28% scrn; 50% new	21.2 hpi with screen
	Estimate at Complete:			
	Variance:			

Other Measures

Production is reported as of 5/27/2024. We are now trying to hit a specific number of completes rather than monitoring against a specific response rate.
RR shown above reflect completion based on the new-screening sample. The panel response rate is 6.5% (panel was not released until April).
Current length 129 minutes, budgeted 140 minutes.
Saliva participation rate is 84%, budgeted at 80%

Project Name	(STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study (On Track)		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 8,809,515.00	Indirect Budget: 4,920,601.00	Total Budget: 13,730,116.00
Principal Investigator/Clients	James Wagner (University of Michigan) Robert Ursano (Uniformed Services University of the Health Science) Murray Stein / Ron Kessler (University of California San Diego / Harvard)		
Funding Agency	Department of Defense		
IRB	HUM#: HUM00180765	Period of Approval: 4/5/23 - 4/4/24	
Project Team	Project Lead: Meredith A House Budget Analyst: William Lokers Production Manager: Ruth B Philippou Senior Project Advisor: Lisa S Holland Production Manager 1: Jeffrey Albrecht Jr Production Manager 2: Lisa M Lewandowski-Romps		
Proposal #	no data		
Description	<p>This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.</p> <p>For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data.</p> <p>To date, we have completed 2 waves of STARRS-LS interviewing. During Wave 1, we attempted to contact 50,000 individuals and completed approximately 14,500 full interviews. All Wave 1 participants that completed a full Wave 1 interview were asked to participate in Wave 2. Waves 3 and 4, which are covered in this application, will include the full STARRS-LS Wave 2 sample, regardless of whether they completed the interview.</p> <p>In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys).</p>		
SRO Project Period	05/2020 - 04/2025		
Data Col Period	11/2022 - 04/2024		
Security Plan	Yes		
Milestones	<div> <div> Pre Production Start: 04/01/2024 Pretest End: Staffing Complete: SS Train Start: DC Start: 11/11/2024 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 05/03/2026 </div> </div>		
Other Project Team Members	Ryan Yoder, Keith Liebetreu, Becky Loomis, Steven Sonoras, Andrew Piskorowski, Rose Zdybel, Ji Qi, Makenna Harrison, Lamont Manley, Lisa Van Havermaet, Stephanie Windisch, Youhong Liu, Peter Sparks. Pam Swanson, Jim Rodgers, Marcus Blough, Nick Hinkle-DeGroot, Pete Westhead		
Other Project Name	STARRS-LS Continuation		
Sample Mgmt System	MSMS		
Data Col Tool	Blaise 5		
Hardware	Laptop; Desktop; [UM cell] Phone		
DE Software	N/A		
QC Recording Tool	Other (Blaise CARI)		
Incentive	Yes, R		

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

Report Period	Apr, 2024 (STARRS-LS Waves 3 & 4)	Implementing
Risk Level	On Track	
Monthly Updates	<p>Project Management and Planning:</p> <ul style="list-style-type: none">? We sent weekly production updates to the PIs, and reported on progress on the call with the Army/M&RA.? Meredith created the agenda/notes and facilitated the weekly meeting with the STARRS project managers.? We carried out bi-weekly meetings with M&RA to coordinate Safety Plan and respondent locating activities.? Budget/Funding:<ul style="list-style-type: none">o We received the Year 4 no cost extension through the end of September 2024 and processed it through the university.o We began the work to convert the Wave 5 ballpark into a formal proposal package.o A memo providing an update on estimated cost to complete for Years 1-5 of the STARRS-LS Continuation project (2020-2025) was sent to the PIs on May 7. The update was necessitated by a recent Survey Research Center (SRC) equity review completed for current staff in survey specialist and survey director titles within the center, which resulted in an increase to the salaries for individuals with these titles. (See also the Cost Report section).? IRB:<ul style="list-style-type: none">o The USUHS IRB acknowledged the continuing review for the current STARRS-LS IRB protocol on April 19.o We continued work on the Wave 5 IRB protocol. The target date for submission is May 20. <p>Enclave and User Support:</p> <ul style="list-style-type: none">? Annual DoD security training: Complete. All training renewals were received by U-M.? Annual IA security review: M&RA reached out on behalf of AAG to request new vulnerability scans. U-M will provide the scans after monthly Enclave maintenance has been completed.? Annual NDI Data Request: M&RA continued work to establish payment with the CDC. U-M is planning to have the submission file ready by mid-June.? Standard Enclave activities continued. These include maintaining security requirements; processing background checks and Great Lakes Cluster (GLC) user access requests, Dropbox requests, ID swap and data transfer requests; managing software acquisition and updates; and providing user support as needed. Of particular note this month:<ul style="list-style-type: none">o DUA (for COVID data sharing) with Jordan Smoller at Mass General Brigham: U-M received the complete list of variables requested on April 26. The inclusion of geographic variables (county/state) in addition to demographics (Army-approved admin and survey variables) required assessment of identity disclosure risk. U-M will include system security/access documentation in the transfer memo. The project is considering adding system security language to the DUA as well.o We learned Harvard would like U-M to geocode the Wave 3 and 4 respondent addresses. We started resource planning for this work to begin in June at the earliest.o We coordinated background check processing for a Harvard analyst who had to re-submit paperwork and be re-fingerprinted.? Biomarker group request for assistance:<ul style="list-style-type: none">o We assisted Dr. Stein with initiating a request for genomic and survey variables to be sent to a Yale researcher working under the DUA with Joel Gelertner. <p>Public Use Data:</p> <ul style="list-style-type: none">? The quarterly ICPSR user report was sent to USUHS for the GSC on April 19.? Biosample flags, administrative variables, and inventory document:<ul style="list-style-type: none">o U-M staff met with ICPSR's curation team on April 18 to discuss their disclosure risk review of the newly deposited administrative data and biosample flags along with the entire STARRS collection available through the public holdings.o U-M sent a memo to the PIs on May 7 describing the risk remediation options, which included reverting to only offering Virtual Data Enclave (VDE) access or ICPSR's curation group addressing the areas of risk in order to continue offering restrictive download access for users. The PIs provided their approval for ICPSR to carry out the work and the cost of \$18K.o We have been working on the draft inventory document. A first step in that process has been to map the list of variables Murray provided to the variables that are available in the ICPSR data files. An Excel file was prepared with the mappings, sent to Harvard for review, and their input was incorporated into the file ahead of sending to Murray for review.? 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. <p>Wave 4 Production Updates:</p> <ul style="list-style-type: none">? Wave 4 data collection was completed on Monday, April 15, 2024. The HIPAA consent reminder phase continued through May 3.o The final production numbers from our live monitoring reporting system were 10,798 completed interviews (10,154 web, 644 phone). The final number of completed interviews to be used in analysis will be determined after U-M and Harvard complete reconciliation steps.o The final Replicate 14 response rate was 75.5%. The final response rate for completed replicates (1-14) was 75.2%. <p>Safety Plan Results:</p> <ul style="list-style-type: none">? The final safety plan rate was 12.9%. Of the 11,241 individuals that started the interview, 1,447 safety plan cases were followed up (1,170 by U-M and 277 by the Army).	

Special Issues

We continue to track areas of risk and develop mitigation strategies.

? U-M STARRS funding timeline and proposal/agreement needs past Year 5.

o U-M will likely experience a gap in funds for continued Wave 5 work after February 2025 until the Year 6 POP award is received (projected to be August 2025 based on past years). SRO and the university are unlikely to authorize a hardship account for more than 2 (maybe 3) months in length.

? There are options for handling the likely gap in funding after February 2025:

? Issuing additional funding to U-M from cost savings,

? Submitting budgets earlier, and/or

? Planning for pre-award spending to be able to start in March 2025.

o Before being sent to a sponsor, every project proposal must be submitted for prior approval through the appropriate University of Michigan channels. The proposal should represent the full scope of work for a project so the university understands to what it is committing. At this time, this would be the full scope of work for Wave 5. Like with the current 5-year Waves 3 and 4 proposal, the awards can still be issued annually.

? U-M will turn the ballpark for the full scope of work for Wave 5 into a formal proposal package, seek approval from the U-M Office of Research and Sponsored Projects (ORSP) and then send it to Dr. Ursano. This will satisfy our need to have a proposal on file with the university.

? Wave 3 consent review and approval process – these risks were described in a September 30, 2020 memo to M&RA.

o The DHA Privacy Board has approved the DSA modification for the MHS HIPAA form; however, we will not receive any sort of VA prior approval. With the VA, we could be in a situation where we employ a VA HIPAA authorization form that ends up not being acceptable to the VA when it comes time to request health records data for linkage. While unlikely, it's also possible the approved MHS HIPAA form might not be acceptable to the providers of those data.

o The risk related to the VA not having reviewed the HIPAA form prior to production was highlighted in the June 15, 2021 GSC meeting when a question was raised as to whether the VHA HIPAA consent language would allow access to VBA data.

? Scope additions

o There are a few cost estimates for new scope that have yet to be made. As decisions are made, we will work with the research team to schedule and implement this work.

o We have received some information on additional public use data releases, including release to the NIH National Data Archive. Several unknowns need to be clarified before we can finalize our scope and cost estimates and determine what staffing will be needed for this work.

Cost as of Mar 31, 2024	Total Cost to Date (direct + indirect):	10,740,586.61
	Est Cost at Completion (E\$AC):	13,935,028.00
	Total Budget:	13,730,116.00
	Variance (Total Budget minus- E\$AC):	204,912.00

Reason for Variance:

Impact of SS/SD rate increases:

a. The impact of the rate changes was \$236K total cost (\$151K direct) for April 2024 on, and another \$23K total cost (\$15K direct) for back pay from Feb and March 2024. Total impact \$259K total cost (\$166K direct).

b. We projected \$317K for March but only spent \$241, so the overall projected variance, prior to making projections updates, was -\$175K total cost (-\$112K direct). Some of the unspent money had to move forward but not all.

c. After moving unspent forward and other projections updates (a mix of increases and decreases), including adding projections for the recent scope increases (noted below), the overall projected variance is -\$205K total cost (-\$134K direct). This is what we reported to the PIs in the final March cost report.

d. In next month's cost report (April), we will remove the March-April 2025 management and enclave costs from the projections. We had previously anticipated being able to cover these costs in a 2-month no cost extension period; however, this work is out of scope because the original U-M budget only included costs through February 2025. After removing these costs (\$241K), the cost report will show a projected surplus of approximately \$36K.

e. The management and enclave costs for March-April 2025 will be added to the Wave 5 budget.

We communicated the above to the PIs in a May 7 memo. They did not have any questions. Meredith reviewed with the USUHS finance person (Josh Ruff) and he understands the situation and plan.

Recent scope increases:

a. Additional geocoding (Wave 3 and 4 respondent addresses): For the most part, this work can be covered by existing projections, but we added 20 hours for someone in DMSS to do the geocoding in the 4th pass noted above.

b. ICPSR provided the budget of \$18,440 for completing additional disclosure remediation work related to the recent biosample flags/admin data release. We added this cost to the projections in the 4th pass noted above.





























Projections as of Mar 31, 2024	Dollars Projected for Month:	316,605.45
	Actual Dollars Used:	240,951.20
	Variance (Projected minus Actual):	75,654.25
	Reason for Variance:	Areas of underspending included the new Enclave server and unspent ICPSR allocations. Other areas were pretty well distributed across

salary and some non-salary.

Measures		Units at Complete	RR	HPI
	<i>Current Goal:</i>			
	<i>Goal at Completion:</i>			
	<i>Current Actual:</i>	10,798	75.2	12.5
	<i>Estimate at Complete:</i>	10,798	75.2	12.5
	<i>Variance:</i>	0	0	0

Other Measures	Wave 4 data collection ended on 4/15/2024. Final numbers are above. Wave 5 data collection begins 11/11/2024.
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Developmental/Initiative Projects Dashboard

NonArchived Development Initiative and No-DataCol Projects							
Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr
<i>TSME24 DCO System Support (483248)</i>	Initiatives	Implementing	Vivienne Y Outlaw				
<i>TSME24 MSMS performance work (425267)</i>	Initiatives	Implementing	Jim Rodgers				
<i>TSME24 MSMS Working Group (425197)</i>	Initiatives	Initiation	Kelly A Chatain				
<i>TSME24 QC Systems (483249)</i>	Initiatives	Implementing	Sarah Elisa Broumand				
<i>TSME24 SRO System Maintenance - General (483910)</i>	Initiatives	Implementing	Jeffrey L Smith				
<i>TSME24 SSL Autoscheduler interface development (42)</i>	Initiatives	Implementing	Debbie Seale				
<i>TSME24 STrak: Migration to SQL Anywhere V17 (</i>	Initiatives	Initiation	Lawrence Daher				

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

Report Period	Apr, 2024 (TSME24 DCO System Support (483248))		Implementing
Risk Level	Some Concerns		
Monthly Updates	- Met with TeamTailor Tech team to brainstorm the different possible options for our data download and upload process. - Explored the options TeamTailor suggested regarding the chaining of attributes. - Explored the options of setting up WebHook to capture the data change along with triggered event.		
Special Issues			
Cost as of May 16, 2024	Total Cost to Date (direct + indirect):		37,630.78
	Est Cost at Completion (E\$AC):		46,484.03
	Total Budget:		35,000.00
	Variance (Total Budget minus- E\$AC):		-11,484.03
	Reason for Variance:	The budget not sufficient to cover Team Tailor needs and ongoing support of DCO systems	
Projections as of May 16, 2024	Dollars Projected for Month:		8,526.36
	Actual Dollars Used:		7,373.43
	Variance (Projected minus Actual):		1,152.93

Reason for Variance: production work required hours that were planned for DCO support

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

Other Measures x

Project Name	(TSME24 MSMS performance work (425267)) TSME24 MSMS performance work (425267) (On Track)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 100,000.00	Indirect Budget: 0.00	Total Budget: 100,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Jim Rodgers		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	To be determined		
SRO Project Period	07/2023 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Apr, 2024 (TSME24 MSMS performance work (425267))		Implementing
Risk Level	On Track		
Monthly Updates	Proceeding as planned		
Special Issues			
Cost as of	Total Cost to Date (direct + indirect):		52,084.14
	Est Cost at Completion (E\$AC):		96,410.75
	Total Budget:		100,000.00
	Variance (Total Budget minus- E\$AC):		3,589.25
	Reason for Variance:	Capacity may not be available	
Projections as of	Dollars Projected for Month:		14,775.54
	Actual Dollars Used:		10,106.73
	Variance (Projected minus Actual):		4,668.81
	Reason for Variance:	Less capacity available than expected	

Measures		Units at Complete	RR	HPI
	<i>Current Goal:</i>			
	<i>Goal at Completion:</i>			
	<i>Current Actual:</i>			
	<i>Estimate at Complete:</i>			
	<i>Variance:</i>			
Other Measures				

Project Name	(TSME24 QC Systems (483249)) TSME24 QC Systems (483249) (On Track)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 49,500.00	Indirect Budget: 0.00	Total Budget: 49,500.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Sarah Elisa Broumand		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	To be defined		
SRO Project Period	07/2023 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div><div>Pre Production Start:</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start:</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End:</div></div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
=====			
Report Period	Apr, 2024 (TSME24 QC Systems (483249))		Implementing
Risk Level	On Track		
Monthly Updates	Same information as last month. No new updates. Programmer working on the Entity framework Cleanup. Waiting on report change requests from QC Implementation Team. Asked Brianna Sabol to help testing the new changes end of May and in June.		
Special Issues			
Cost as of May 16, 2024	Total Cost to Date (direct + indirect):		28,626.36
	Est Cost at Completion (E\$AC):		49,449.04
	Total Budget:		49,500.00
	Variance (Total Budget minus- E\$AC):		50.96
	Reason for Variance:		Got the financial report just yesterday and the hours I charged did not come through to CRS. We will have some money left by end of June, but much less than 4,000.
Projections as of May 16, 2024	Dollars Projected for Month:		8,818.13
	Actual Dollars Used:		4,065.85
	Variance (Projected minus Actual):		4,752.28
	Reason for Variance:		Sarah B's hours were not included in CRS, reflecting a larger Variance

then it should. Other hours were carried forward.

Measures		Units at Complete	RR	HPI
	<i>Current Goal:</i>			
	<i>Goal at Completion:</i>			
	<i>Current Actual:</i>			
	<i>Estimate at Complete:</i>			
	<i>Variance:</i>			

Other Measures

Project Name	(TSME24 SRO System Maintenance - General (483910)) TSME24 SRO System Maintenance - General (483910) (On Track)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 20,000.00	Indirect Budget: 0.00	Total Budget: 20,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Jeffrey L Smith		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	Pending input from Manager		
SRO Project Period	07/2023 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div>Pre Production Start:</div> <div>Pretest End:</div> <div>Staffing Complete:</div> <div>SS Train Start:</div> <div>DC Start:</div> </div> <div> <div>Pretest Start:</div> <div>Recruitment Start:</div> <div>GIT Start:</div> <div>SS Train End:</div> <div>DC End:</div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Apr, 2024 (TSME24 SRO System Maintenance - General (483910))		Implementing
Risk Level	On Track		
Monthly Updates	<p>In preparation for the upcoming upgrade to SQLAnywhere 17, our team has outlined and started various necessary tasks to ensure a smooth transition. The following tasks are in the process of being addressed:</p> <ol style="list-style-type: none"> 1. Updating the 64-bit Database Extractor to align with the new database requirements. 2. Integrating the latest feature set and enhancements required for SurveyTrak 2025. 3. Conducting code cleanup for SurveyTrak 2025 to streamline performance and maintainability. 4. Debugging the newly implemented PowerBuilder Foundation Classes (PFCs) to ensure functionality. 5. Upgrading the SurveyTrak 2025 operational environment, which includes configuring new laptop specifications tailored for running SurveyTrak 2025. 6. Implementing updates to the SurveyTrak Administration module for compatibility with SurveyTrak 2025. 7. ST/PB (SurveyTrak/PowerBuilder) build team meetings 8. Adapt SurveyTrak to interface with the Help Desk's new Audio Checker application, spearheaded by Chad. 		
Special Issues	None		
Cost as of May 16, 2024	Total Cost to Date (direct + indirect):	30,242.33	
	Est Cost at Completion (E\$AC):	33,459.62	
	Total Budget:	20,000.00	

<i>Variance (Total Budget minus- E\$AC):</i>		-13,459.62		
<i>Reason for Variance:</i>		None		
Projections as of May 16, 2024	<i>Dollars Projected for Month:</i>	1,608.65		
	<i>Actual Dollars Used:</i>	4,424.07		
	<i>Variance (Projected minus Actual):</i>	-2,815.42		
	<i>Reason for Variance:</i>	None		
Measures		Units at Complete	RR	HPI
	<i>Current Goal:</i>			
	<i>Goal at Completion:</i>			
	<i>Current Actual:</i>			
	<i>Estimate at Complete:</i>			
	<i>Variance:</i>			
Other Measures				

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

Report Period	Apr, 2024 (TSME24 SSL Autoscheduler		Implementing
Risk Level	Some Concerns		
Monthly Updates	We used the Auto Scheduler freeze/re-do function with the most recent schedule (being posted on 5/14). One function was removed from the auto scheduler due to a R Shiny issue - we are unable to go back to a previous freeze/re-do option through R Shiny. As a work around, we downloaded each version so that we could upload the version in UKG, if we wanted to move forward with the previous version. This is a time cumbersome work around and will remain in place while Wen and Ji continue to work on a fix with CMT/ITS.		
Special Issues			
Cost as of May 14, 2024	Total Cost to Date (direct + indirect):	0.00	
	Est Cost at Completion (E\$AC):	0.00	
	Total Budget:	1.00	
	Variance (Total Budget minus- E\$AC):	0.00	
	Reason for Variance:		

Projections as of May 14, 2024		Dollars Projected for Month:			0.00
		Actual Dollars Used:			0.00
		Variance (Projected minus Actual):			0.00
		Reason for Variance:			
Measures		Units at Complete	RR	HPI	
	Current Goal:				
	Goal at Completion:				
	Current Actual:				
	Estimate at Complete:				
	Variance:				
Other Measures					

Project Name	(TSME24 STrak: Migration to SQL Anywhere V17 () TSME24 STrak: Migration to SQL Anywhere V17 (483227) (Some Concerns)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 30,000.00	Indirect Budget: 0.00	Total Budget: 30,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Lawrence Daher		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	To be defined		
SRO Project Period	07/2023 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div><div>Pre Production Start:</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start:</div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End:</div></div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Apr, 2024 (TSME24 STrak: Migration to SQL Anywhere V17 (483227) (Some Concerns))		Initiation
Risk Level	Some Concerns		
Monthly Updates	Laptop testing phase: backup of log file on laptop corrected. On the server front: Full and incremental backups are working. WebTrak testing begun		
Special Issues			
Cost as of May 16, 2024	Total Cost to Date (direct + indirect):	14,787.69	
	Est Cost at Completion (E\$AC):	25,906.23	
	Total Budget:	30,000.00	
	Variance (Total Budget minus- E\$AC):	4,093.77	
	Reason for Variance:	Many applications requiring updates	
Projections as of May 16, 2024	Dollars Projected for Month:	10,610.31	
	Actual Dollars Used:	5,123.51	
	Variance (Projected minus Actual):	5,486.80	
	Reason for Variance:	?	

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