Survey Research Operations

Monthly Project Report

Sponsored Data Collection Projects and Development Initiative

August 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

(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

(CVFS-SCAN) Chitwan Valley Family Study - Study on Cognition and Aging in Nepal

(Health and Well Being in SE MI) Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan)

(Healthy Brain Project) Healthy Brain Project

(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 CDS23 Phase 2) PSID Childhood Development Supplement 2023 Phase 2

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

(PSID23) Panel Study of Income Dynamics Core 2023

(PSID25) Panel Study of Income Dynamics Core 2025

(SAND COVID Follow-Up) Study of Adolescent to Adult Neural Development (SAND) COVID-19 Follow-up Study

(SCA 2024) Surveys of Consumer Attitudes

(SCA Web) SCA Web

(SCIP 2024) Sustainability Cultural Indicators Project

(SRS 2021) Social Relations 2023

(STARRS-LS Waves 3, 4, 5 (Yr1)) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study

(TSME25 Blaise 5 (423562)) TSME25 Blaise 5 version and system testing (423562)

(TSME25 DCO Systems Support (483248)) TSME25 DCO Systems Support (483248)

(TSME25 MSMS Line Generator (483227)) TSME25 MSMS Line Generator (483227)

(TSME25 MSMS Performance (425267)) TSME25 Mixed-mode systems dev support - Reliability & Performance (425267)

(TSME25 ODS Data Dictionary (425198)) TSME25 ODS Data Dictionary (425198)

(TSME25 QC Systems (483249)) TSME25 QC Systems (483249)

(TSME25 REPLACE RPAY (423463)) TSME25 REPLACE RPAY (423463)

(TSME25 System Maintenance - General (483910)) TSME25 System Maintenance - General (483910)

(TSME25 Team Dynamix (425197)) TSME25 Team Dynamix (425197)

(TSME25 Translation Tool (483424)) TSME25 Translation Tool (483424)

Sponsored Projects Dashboard

NonArchived Sponsored Projects

Legend: 🟢 = Green, 🟡 = Yellow, 🔴 = Red, ☐ = blank/no data

Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
ANES 2024	Sponsored	Implementing	Andrew L Hupp	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🔴
BFY	Sponsored	Implementing	Piotr Dworak	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
BHM Library Project	Sponsored	Implementing	Karin Schneider	🟡	🟡	🟡	🟢	🟢	🟢	🟢	🟡
CARE Military	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
CARE SALTOS MTEC	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟡	🟢	🟢	🟢	🟢	🟢
CCS	Sponsored	Initiation	Jeffrey Albrecht Jr	🟡	🟢	🟢	🟢	🟢	🟡	🟢	🟡
CVFS-SCAN	Sponsored	Implementing	Maureen Joan O'Brien	☐	☐	☐	☐	☐	🟢	🟢	🟢
Health and Well Being in SE MI	Sponsored	Implementing	Barbara Lohr Ward	🔴	🔴	🔴	🔴	🟡	🟡	🟡	🟡
Healthy Brain Project	Sponsored	Implementing	Barbara Lohr Ward	☐	☐	☐	☐	☐	☐	🟡	🟡
HRS 2022 Panel & Baselines	Sponsored	Implementing	Evanthia Leissou	🟢	🟡	🟡	🟡	🟡	🟡	🟡	🟡
HRS 2024	Sponsored	Implementing	Evanthia Leissou	🟡	🟡	🟡	🟢	🟢	🟢	🟡	🟢
HRS2022-Screening	Sponsored	Implementing	Evanthia Leissou	🟡	🟡	🟡	🟡	🟡	🟢	🟡	🟡
IHDS3	Sponsored	Closing	Sarah Elisa Broumand	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
LHMS 2023 Fall	Sponsored	Implementing	Gary Hein	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
LHMS 2023 Spring	Sponsored	Implementing	Gary Hein	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
MI CReSS (Year 3 & 4)	Sponsored	Implementing	Timothy Prand	🟡	🟢	🟢	🟢	🟢	🟢	🟢	🟢
MTF Base Year 2022_27	Sponsored	Implementing	Rebecca Gatward	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
MTF Early Panel Pilot	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
MTF Panel 2022-27	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
NDWS	Sponsored	Implementing	Margaret Lee Hudson	☐	🟢	🟢	🟢	🟢	🟢	🟢	🟢
PR-PSID	Sponsored	Implementing	Camila Kendall	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
PSID 2025 OCU	Sponsored	Implementing	Camila Kendall	☐	☐	☐	🟢	🟢	🟡	🟢	🟢
PSID CDS 2023	Sponsored	Implementing	Piotr Dworak	🟢	🟢	🟢	🟢	🟡	🟢	🟢	🟢
PSID CDS23 Phase 2	Sponsored	Implementing	Camila Kendall	☐	☐	☐	☐	☐	☐	☐	🟡
PSID TAS 2023	Sponsored	Closing	Elizabeth Ohryn	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
PSID23	Sponsored	Implementing	Rachel Anne Orlowski	🟢	🟡	🟢	🟢	🟢	🟢	🟢	🟢
PSID25	Sponsored	Implementing	Rachel Anne Orlowski	☐	☐	☐	☐	🟢	🟢	🟢	🟢
SAND COVID Follow-Up	Sponsored	Implementing	Elizabeth Ohryn	☐	☐	☐	☐	🟢	🟢	🟢	🟢
SCA 2024	Sponsored	Initiation	William Keating	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
SCA Web	Sponsored	Implementing	William Keating	☐	☐	☐	☐	☐	☐	🟢	🟢
SCIP 2024	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	☐	☐	☐	☐	☐	☐	🟢	🟢
SRS 2021	Sponsored	Implementing	Barbara Lohr Ward	🔴	🟢	🟢	🟡	🟡	🟢	🟡	🟡
STARRS-LS Waves 3, 4, 5 (Yr1)	Sponsored	Implementing	Meredith A House	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢

Project Name	**(ANES 2024) American National Election Studies - 2024 (Attention!)**
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	Nicholas A. Valentino (University of Michigan)
Investigator/Clients	Shanto Iyengar (Stanford University)
	D. Sunshine Hillygus (Duke University)
Funding Agency	National Science Foundation (NSF)
IRB	**HUM#:** HUM00226016 **Period of Approval:** Study is exempt
Project Team	**Project Lead:** Andrew L Hupp
	Budget Analyst: William Lokers
	Production Manager: Theresa Camelo
	Senior Project Advisor: Grant D Benson
	Production Manager 1: Margaret Lavanger
	Production Manager 2: Lisa Van Havermaet
Proposal #	no data
Description	The mission of the American National Election Studies (ANES) is to inform explanations of election outcomes by providing data that support rich hypothesis testing, maximize methodological excellence, measure many variables, and promote comparisons across people, contexts, and time. The ANES serves this mission by providing researchers with a view of the political world through the eyes of ordinary citizens.

SRO will be conducting the 2024 data collection. |
SRO Project Period	07/2023 - 01/2025
Data Col Period	
Security Plan	NA

Milestones		
Pre Production Start: 03/01/2024		**Pretest Start:**
Pretest End:		**Recruitment Start:**
Staffing Complete:		**GIT Start:** 07/09/2024
SS Train Start: 07/10/2024		**SS Train End:**
DC Start: 08/01/2024		**DC End:** 03/31/2025

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)

Report Period	Aug, 2024 (ANES 2024)		Implementing
Risk Level	Attention!		

Monthly Updates	*** This is an abbreviated update *** After a slow start to data collection, a meeting was held with the PIs, resulting in permission to launch additional interviewer recruitment, training, and traveling. We generally agreed that getting 25-30 additional interviewers would be the goal. We planned for 3 additional trainings: One for September 5-6, training 7 on-staffers and 4 regular staff members with prior interviewing experience, one for September 25-26 with an additional 18 on-staffers (including 4 SSL interviewers who were transferred to the Field) and 1 regular staff member, and one for October 11 with 2-4 SSL interviewers and 1 student. In additional several protocol changes were discussed and approved. This included telephone interviewing, increased incentives, and the additional of a "Targeted Republican Letter". These added scope for MSG and programming changes for the TSG team. The TSG team were very responsive and able to quickly identify key sticking points and implement fixes. Web and panel cases are doing well.
Special Issues	In addition to staffing constraints on being able to meet production goals for FTF, we had a large proportion of cases (~10%) in limited access areas. We worked with DMSS to quickly identify and release an additional 360 cases in high density Republican areas. DMSS was very responsive to both the research team and to DCO, and were able to turn around the identification of the cases within a day of being given the go-ahead from the research team. We are trading off response rate (hoping for no less than 38%, but willing to go to 35%) in order to get at least 1000 FTF interviews, and preferably the full 1200. It is unclear that we will get to those completed FTF interview goals.

Cost as of	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	6,551,320.00
	Variance (Total Budget minus- E$AC):	0.00
	Reason for Variance:	

Projections as of	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	0.00
	Variance (Projected minus Actual):	0.00
	Reason for Variance:	

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

Other Measures

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**: 6,576,681.00	**Indirect Budget:** 2,123,680.73	**Total Budget:** 8,700,361.73
Principal	Dr. Greg Duncan (University of California - Irvine)		
Investigator/Clients	Dr. Kimberly Noble (Teachers College Columbia University)		
	Dr. Katherine Magnuson (University of Wisconsin)		
Funding Agency	National Institute of Child Health and Human Development (NICHD)		
IRB	***HUM#:*** HUM00137963		***Period of Approval:***
Project Team	***Project Lead:*** Piotr Dworak		
	Budget Analyst: David Kellermeyer		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Margaret Lavanger		
	Production Manager 2:		
Proposal #	no data		
Description	University of Michigan Survey Research Center (U-M SRC) is contracted to recruit and interview participants for Baby's First Years -- a longitudinal randomized control trial study.		

University of Michigan Survey Research Center (U-M SRC) is contracted to recruit and interview participants for Baby's First Years -- a longitudinal randomized control trial study.

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

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

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

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

Recruitment/Baseline: 04/01/2018 - 03/31/2019
       Wave 1: 04/01/2019 - 03/31/2020
       Wave 2: 04/01/2020 - 03/31/2021
       Wave 3: 04/01/2021 - 03/31/2022

SRO Project Period	10/2017 - 12/2020
Data Col Period	04/2018 - 12/2020
Security Plan	NA

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

Other Project Team Members	Stephanie Chardoul (SPA) Piotr Dworak (Lead) Tony Romanowski (PM) Daric Thorne (PM/SSA) Barb Homburg (PM) Peggy Lavanger (PM) Jim McClure (DCS) Jeff Smith (tech lead) Jim Rodgers (MSMS consultant) Andrew Hupp (MSMS consultant) Pam Swanson (MSMS programmer) 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	Aug, 2024 (BFY)	Implementing
Risk Level	On Track	
Monthly Updates	BFY Age 5- 8:	

BFY has awarded SRO continuing work throughout Age 8 (August 2027).

On June 17 we started recruiting respondents for the Age 6 Lab visits conducted by the PI research team on-site in LA, MN, NE, and NY. We are also conducting a Age5 check-ins and re-contacting all Rs who completed Age 4 Lab Visit but have not had their contact information updated since.

Lab recruitment outcomes: So far, we have sent nearly half of 1,000 participants (n = 447) over to the lab representing 87% of eligible respondents (eligible given their age cohort).

Efforts continue to increase the rate of recruitment. Sample is being monitored case-by-case and reassigned as needed. We brought back one interviewer and one TL to help improve coverage in NE and among the Spanish-speaking cases in particular in MN where we lost our only interviewer.

Team is also working with the PIs on more efficient ways to hand-off respondents. We are pre-selecting cases which can go directly to the lab after being contacted by SRO at some point between Age 5 and 6. We are also handing off any cases which requested a diverging lab timeline due to personal schedules. On 9-30, we will be conducting a joint SRO - Lab staff training to increase opportunities for SRO interviewers to work directly with the site teams.

During the upcoming training, SRO - Lab teams will discuss how to effectively follow up with non-response or hard-to-reach cases sooner and how to complete the maternal phone interviews with hard-to-reach cases. To that end, all SRO interviewers will get access to the BFY Sample Management System developed by University of Wisconsin.

To the extent possible given limited hours, interviewers are also keeping in touch with families not yet eligible for Lab recruitment and contact them to update the contact information throughout the year.

Age 5 Staffing:

Our only recent attrition is limiting our ability to conduct FTF work in MN and Spanish in NE. We do not plan any additional hiring and will consider traveling staff to those areas.

10 iwers in total
NE: 1 OS (1 NH resigned)
MN: 0 local (1 resigned)
NY: 3 OS
NOLA: 1
Locators: 2
TLs: 1

Technical system:
Working as expected.

Special Issues	

Cost as of Sep 18, 2024	Total Cost to Date (direct + indirect):		7,789,261.15
	Est Cost at Completion (E$AC):		8,751,419.73
	Total Budget:		8,700,361.73
	Variance (Total Budget minus- E$AC):		-51,058.00
	Reason for Variance:	Total overrun increased to $51K as a result of iwer merit increases and salary adjustments and August monthly overrun. The scale of increase is concerning but we have some time to consider options (project is funded through July 2027).	
Projections as of Sep 18, 2024	Dollars Projected for Month:		22,158.98
	Actual Dollars Used:		29,109.08
	Variance (Projected minus Actual):		-6,950.10
	Reason for Variance:	Monthly overrun is due to higher iwer hours but the total amount (direct + indirect) may be slightly lower than reported here because the Indirect fees on the multi-funder account are not yet adjusted for the actual monthly spend (some amount goes to the collector account first). Finance group has more info. However, any monthly overrun is concerning given the total project overrun.	

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

Other Measures

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

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

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

Report Period	Aug, 2024 (BHM Library Project)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Natl Survey launch slowed. Small team conducting lookups is working, however, the lists returned from them are difficult to work with.	
Special Issues	No new issues.	
Cost as of Sep 18, 2024	*Total Cost to Date (direct + indirect):*	122,079.18
	Est Cost at Completion (E$AC):	193,242.87
	Total Budget:	197,671.00
	Variance (Total Budget minus- E$AC):	4,428.13
	Reason for Variance: NA	
Projections as of Sep 18, 2024	*Dollars Projected for Month:*	13,015.36

		Units at Complete	RR	HPI
Actual Dollars Used:		7,347.90		
Variance (Projected minus Actual):		5,667.46		
Reason for Variance:	Hours projected not used.			
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	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.

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.

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.

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

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

Other Project Team Members	Donnalee Grey-Farquharson, Barb Homburg, Hongyu Johnson, James Koopman, Keith Liebetreu, David Ackuaku, Ruyi Chen, David Kellermeyer
Other Project Name	CARE-CSI Military
Sample Mgmt System	Other (non-SRO)
Data Col Tool	Other (non-SRO)
Hardware	Laptop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, R
Administration	Other (Kinesiology)
Payment Type	Check, post ($150)
Payment Method	Other (Kinesiology)

Report Period	Aug, 2024 (CARE Military)	Implementing
Risk Level	On Track	
Monthly Updates	Tango reward cards are being used to pay respondents who are residing overseas. System issues continue with

little or no resolutions by QuesGen. The issues are mainly related to CP contact logs, discrepancies in sample deliveries, and issues in transfer of sample between SRO Systems and other CARE User Systems. SRO continues to fix locating reports.

The field interviewers have done a mini challenge between three teams to boost productivity. As of 8/31/2024, the total completed military cases (DCP2+DCP3) was 4032. In DCP3, total Released military samples = 9669. Total Completed cases = 699 (Web=693, CATI = 6). Finally, one interviewer left the project for personal reasons.

Special Issues

Cost as of Aug 31, 2024	*Total Cost to Date (direct + indirect):*		1,684,473.95
	Est Cost at Completion (E$AC):		1,684,473.95
	Total Budget:		1,685,902.70
	Variance (Total Budget minus- E$AC):		1,428.75
	Reason for Variance:	We don't have new funding currently to support the military work. However, military work resumed in April 2024 with civilian funds.	
		**Note: In August 2024, we allocated $59,867.53 to the Military project with the Civilian funds. This brings our cumulative spending on the military project to $234,069.90 from April to August 2024. The current spending on Military is reflected the underrun amount in Civilian funds.	
Projections as of Aug 31, 2024	*Dollars Projected for Month:*		0.00
	Actual Dollars Used:		52,516.66
	Variance (Projected minus Actual):		-52,516.66
	Reason for Variance:	Since we are using Civilian funds there are no projections for this account.	
		**Note: In July 2024, we allocated $52,142.09 to the Military project with the Civilian funds. This brings our cumulative spending on the project to $174,202.37 from April to July 2024. The current spending on Military is reflected the underrun 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	In 2014, the U.S. Department of Defense (DoD) and the National Collegiate Athletic Association (NCAA) established and funded the Concussion Assessment, Research and Education (CARE) Consortium to inform science, clinical care and public policy related to concussion and repetitive head impact exposure (HIE) in U.S. Military Service Academy (MSA) cadets and collegiate student-athletes. Since then, CARE has enrolled >50,000 MSA cadets/midshipmen and NCAA student-athletes from 30 participating collegiate institutions, representing 26 NCAA sports, and military training and other recreational activities. In addition, the CARE study has captured data on over 5,000 concussed cadets/midshipmen and athletes – the largest concussion database of its kind. This public-private study is designed to answer key knowledge gaps around clinical and neurobiological recovery, brain structure and function, and factors predicting outcomes in MSA members and NCAA student-athletes. This CARE/SALTOS Integrated (CSI) Study phase investigates the nature and causes of long-term effects of head impact exposure and concussion/mild traumatic brain injury (mTBI) in former NCAA student-athletes and military service members. The data collected in this phase will build on that collected in previous phases

SRO provides consultation, respondent locating activities and data collection for respondents in the longitudinal Concussion Assessment, Research and Education (CARE) study, with the goal of securing participation from 7,500 unique past-CARE study participants. Participants will complete the same set of study assessments at two time points over the five-year project period. The project follows collegiate athletes post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure. Specifically, SRO decentralized field interviewers will locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.

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

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

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

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

Other Project Team Members	Donnalee Grey-Farquharson, Barb Homburg, Hongyu Johnson, Keith 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	Aug, 2024 (CARE SALTOS MTEC)	Implementing
Risk Level	On Track	
Monthly Updates	Tango reward cards are being used to pay respondents who are residing overseas. System issues continue with little or no resolutions by QuesGen. The issues are mainly related to CP contact logs, discrepancies in sample deliveries, and issues in transfer of sample between SRO Systems and other CARE User Systems. SRO continues to fix locating reports. The field interviewers have done a mini challenge between three teams to boost productivity. As of 8/31/2024, the total completed civilian cases (DCP2+DCP3) was 5540 . In DCP3, total Released civilian samples = 20019. Total Completed cases = 2234 (Web=2206, CATI = 28). Finally, one interviewer left the project for personal reasons.	

Special Issues		
Cost as of Aug 31, 2024	**Total Cost to Date (direct + indirect):**	2,904,991.33
	Est Cost at Completion (E$AC):	4,641,573.96
	Total Budget:	4,685,914.00
	Variance (Total Budget minus- E$AC):	44,340.04
	Reason for Variance:	Variance of underrun increased this month due to reduction of three key project staff hours in order to support another project. The reduction of hours will continue through March 2025. **Note: In August 2024, we allocated $59,867.53 to the Military project with the Civilian funds. This brings our cumulative spending on the military project to $234,069.90 from April to August 2024. The current spending on Military is reflected the underrun amount in Civilian funds.
Projections as of Aug 31, 2024	**Dollars Projected for Month:**	146,806.54
	Actual Dollars Used:	137,275.34
	Variance (Projected minus Actual):	9,531.20
	Reason for Variance:	Interviewer projections were very accurate and close to actuals in August. Accurint account charges were not posted in August but will be accounted for in September, and the field interviewer rate will be reflected accurately next month.

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

Other Measures

Project Name	**(CCS) Community College Survey (Some Concerns)**
Project Mode	Primary: Web Total of Modes: 1
Project Type	Sponsored Projects
Budget	**Direct Budget**: 560,774.00 **Indirect Budget:** 84,115.00 **Total Budget:** 644,889.00
Principal	Hana Lahr (Teachers College, Columbia University)
Investigator/Clients	Veronica Minaya (Teachers College, Columbia University)
	Rachel Baker (University of Pennsylvania)
Funding Agency	Ascendium Education Group
IRB	**HUM#:** 00237400 **Period of Approval:**
Project Team	**Project Lead:** Jeffrey Albrecht Jr
	Budget Analyst: Nicole Danielle Doher
	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		
Pre Production Start: 08/01/2024	**Pretest Start:**
Pretest End:	**Recruitment Start:** 09/17/2024
Staffing Complete:	**GIT Start:**
SS Train Start: 10/23/2024	**SS Train End:** 10/23/2024
DC Start: 10/14/2024	**DC End:** 12/08/2024

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	Aug, 2024 (CCS)	Initiation
Risk Level	Some Concerns	
Monthly Updates	-Marsha worked on programming the English version of the Wave 3 survey. -Hueichun and Shaowei began programming Web SMS. -Jeffrey worked primarily on budget negotiations. -Steven and Chad tested the English survey. -Ed and Jennie began work on the testing preload.	
Special Issues	See reasons for project variance.	
Cost as of Aug 20, 2024	**Total Cost to Date (direct + indirect):**	606,866.02
	Est Cost at Completion (E$AC):	840,298.66
	Total Budget:	644,889.00
	Variance (Total Budget minus- E$AC):	-34,715.66

	Reason for Variance:	From June through the first week of August, Jeffrey worked with proposals and the PIs to reach an agreement on the August Wave 3 rebudget. In that agreement, we planned on maxing out respondent payments at 1,100 and to do reminder calling for ~100 hours. That proposal was approved by ORSP at U-M and Teachers College and then was delivered to the funder (Ascendium) on 8/19 for their review. Then, before their approval was confirmed, the PIs discovered that they were missing key data from one of the colleges in the sample (comprising half of the overall sample) in Wave 2. We discovered that there was a mismatch between the preload and the survey programming, so those data were not collected (an SRO error). After several weeks of memos (in September) and several additional ballparks, we arrived at an agreement that increased the sample size and calling effort. That proposal is now in process at U-M and TC and expected to be with U-M ORSP today, 9/24. Per the most recent agreement, the project overrun reflected in this MPR (~$35,000 in total costs) will be paid by Stephanie, using her sequestering account.
Projections as of Aug 20, 2024	**Dollars Projected for Month:**	25,556.00
	Actual Dollars Used:	20,516.31
	Variance (Projected minus Actual):	5,039.69
	Reason for Variance:	In August, Hueichun began programming Web SMS but was needed more urgently on other projects and so only worked about half of the hours on CCS as what was projected. Similarly, Marsha worked less than anticipated on survey setup and testing.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	2,112	47%	
	Goal at Completion:	2,112	47%	
	Current Actual:	0	0%	
	Estimate at Complete:	2,112	47%	
	Variance:	0	0	

Other Measures

Project Name	**(CVFS-SCAN) Chitwan Valley Family Study - Study on Cognition and Aging in Nepal (On Track)**		
Project Mode	Primary: Face to Face Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 366,368.00	**Indirect Budget:** 205,180.00	**Total Budget:** 571,548.00
Principal	Dirgha Ghimire (Survey Research Center)		
Investigator/Clients	Carlos Mendes de Leon (Georgetown University School of Medicine)		
Funding Agency	NIH		
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Maureen Joan O'Brien		
	Budget Analyst: David Kellermeyer		
	Production Manager:		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	SRO is working cooperatively with the PIs and their research team as well as the Institue for Social and Environmental Research – Nepal – ISERN – to provide consultation, programming and support for data collection over 2 waves of interviewing. SRO will provide support in the following areas: instrument programming and testing, sample management system programming and testing, and data delivery.		
SRO Project Period	07/2024 - 03/2025		
Data Col Period			
Security Plan	NA		

Milestones			
Pre Production Start: 08/01/2024		*Pretest Start:* 10/15/2024	
Pretest End: 10/31/2024		*Recruitment Start:*	
Staffing Complete:		*GIT Start:* 12/26/2024	
SS Train Start: 01/06/2025		*SS Train End:* 01/12/2025	
DC Start: 02/19/2025		*DC End:*	

Other Project Team Members	Technical Lead: Jennie Williams Programmer Analyst-Blaise: Peter Sparks, Karl Dinkelmann, TSG Programmer Analyst-Surveytrak Int: Marsha Skoman, TSG Programmer Analyst-Weblog: Ashwin Dey, TSG Database Administrator: Lishwu Ke, TSG Data Manager Specialist: Jennie Williams, Valyn Dall, TSG Help Desk: Emmanuel Ellis, TSG
Other Project Name	HCAP Nepal,
Sample Mgmt System	SurveyTrak; Project specific system (Weblog, QC system)
Data Col Tool	Blaise 4.8
Hardware	Laptop
DE Software	NA
QC Recording Tool	Other (TBD)
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Aug, 2024 (CVFS-SCAN)	Implementing
Risk Level	On Track	
Monthly Updates	IRB: The Nepal IRB has granted approvals, so now the study is under review with Michigan IRB. Technical updates: Surveytrak systems are being programmed using CIDI specs as a starting point. HCAP 2022 Surveytrak specs have been reviewed as well to help program the Informant line and associated tabs. Hardware: ISER-N has finalized make and model of desired laptop. There was some difficulty in determine who would purchase the Windows Volumne licensing, so SRO aggreed to purchase. However, since then it has been determined that Nepal can purchase the licenses at time of laptop purchase after all. So, we will move forward with this plan. They will order 2 additional laptops for SRO use for testing. They will be ordered from Lenovo in Nepal and shipped directly to SRO.	

Questionnaire: ISER-N has completed the writing of the Blaise specifications for all sections of the Respondent interview, Day 1 and Day 2. The PIs have decided that a Proxy may stand in and complete the Respondent interview, excluding the cognitive assessments, and that if a Proxy is used, there will be no attempt with the R interview. SRO has been working on programming the Blaise instrument for a few weeks now. We are beginning to test in CTT.

Translations: The instrument has been translated into Nepali. Once there is Michigan IRB approval, an ISER-N focus group will review the questionnaire to ensure language is appropriate. Then, Nepali Blaise programming will begin. ISER-N staff will work on the editing tasks of translating the specs.

Timeline: There is some concern with project timeline as it is already tight and the PI has added a Pretest and Focus group into the schedule. The Pretest will be done by paper and pencil, and will serve as training for trainers for production. The SRO proejct lead will train ISER-N staff on the overview of the HCAP assessments as well as general steps for administernig them.

Training: The SRO project lead and ISER-N team have met to discuss training expectations. Training is planned for the 1st and 2nd week of January. Will continue to narrow down expectations.

Special Issues

Cost as of Sep 12, 2024	*Total Cost to Date (direct + indirect):*		51,247.20
	Est Cost at Completion (E$AC):		288,484.27
	Total Budget:		571,548.00
	Variance (Total Budget minus- E$AC):		283,063.73
	Reason for Variance:	Costs are currently projected through March 2025 but will be extended when SRO's role during data collection is more clearly defined.	
Projections as of Sep 12, 2024	*Dollars Projected for Month:*		27,317.63
	Actual Dollars Used:		21,483.35
	Variance (Projected minus Actual):		5,834.28
	Reason for Variance:	The August underrun was mainly due to technical staff undercharging. Unused staff hours have been pushed forward.	

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

Other Measures

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

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

Other Project Team Members	Taghreid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall
Other Project Name	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	Aug, 2024 (Health and Well Being in SE MI)	Implementing
Risk Level	Some Concerns	
Monthly Updates	The D-AMP revised study goals agreed upon with the PIs are to complete 200 new sample, 400 convenience sample and 200 panel sample cases. As of 9/23/2024, we have exceeded the new sample goal, and we will continue to complete these cases as they come in. The convenience sample is coming in below our budgeted HPI, and this is giving us a little breathing room in the budget. We have been able to stretch data collection into January.

To extend the new sample cases, we previously completed a line-by-line review of recently generated cases. These cases continue to be worked. We will continue to follow up on any spawned new sample cases to see if we can convert them to interviews without undertaking new screening. We also have a substantial amount of open screening lines that can be worked.
As is happening in SRS, the D-AMP panel sample is coming in much higher than the HPI projections (almost 14 HPI compared to roughly 9 HPI budgeted). The D-AMP panel can benefit from the use of partial telephone | |

interviews, with the survey portion being completed via phone with a follow-up visit to complete the in-person portion. We have a well-written "plea" letter from the PI that is also being used for panel. That said, as with SRS, it appears that we are running into the same charged political environment as during screening, where race/ethnicity matching may be required in order to get the panel sample members to answer the door or speak to an interviewer.

Our project management team is working on line-by-line reviews of all panel cases to suggest strategies to use when approaching households, looking for refusal conversion/aversion opportunities, and suggesting other interventions such as locating, letters, different call windows, etc. We hope this work will help refocus the field team on the panel sample.

We have engaged the PIs in a discussion of how to handle the panel sample. We have not yet done a sufficient amount of locating to see if travel could be productive or cost effective. This month (early September) we also made a proposed to train a small group of interviewers to conduct a shortened, telephone data collection that could be done with no or minimal programming. The PIs have not moved forward on that proposal. They have also previously declined to approve an end-game incentive. The PIs seem to be tending toward wanting a very complicated, costly and lengthy interventions which would require extensive programming and testing. We have also made it clear that any money spent on programming reduces the money available for interviewing.

Interviewers and team leaders have continued to struggle with charging time properly between D-AMP and Healthy Brain. We are working with the field team to rebalance their time and expense charges. This has been partially successful and this is an area in which we will need to continue to work.

Special Issues	We want to call out the issues with the panel sample noted above. We are having a great deal of difficulty getting the field team to balance their charges between D-AMP and Healthy Brain. This is causing underruns in one project and overruns in the other.

Cost as of Sep 18, 2024		
	Total Cost to Date (direct + indirect):	3,264,604.00
	Est Cost at Completion (E$AC):	3,754,269.18
	Total Budget:	3,758,127.00
	Variance (Total Budget minus- E$AC):	3,857.82
	Reason for Variance:	This is an insignificant variance. We expect the project to use the full budget for production.

Projections as of Sep 18, 2024		
	Dollars Projected for Month:	-40,430.82
	Actual Dollars Used:	-7,895.30
	Variance (Projected minus Actual):	-32,535.52
	Reason for Variance:	Journal entries for screening effort were finally processed, which resulted in the negative variance. Our variance was significant off from what we projected due to our difficulty in getting interviewers and team leaders to properly balance their charges between the Healthy Brain Study and the D-AMP study, although they are given instructions after every interview on how to charge their time.

Measures		Units at Complete	RR	HPI
	Current Goal:	200/400/200 design		9.0 new/ 9.0 panel
	Goal at Completion:	200/400/200 design		
	Current Actual:	224/196/93	39% scrnr; 40% new	8.4 new/~14 panel
	Estimate at Complete:			
	Variance:			
Other Measures	Actuals are as of 9/23/2024. The budgeted HPI for the convenience sample was 6.5 HPI plus 1 HPI for the informant. We are running at 3.8 HPI for the convenience sample.			

Project Name	(Healthy Brain Project) Healthy Brain Project (Some Concerns)		
Project Mode	Primary: Face to Face Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 985,452.00	**Indirect Budget:** 551,854.00	**Total Budget:** 1,537,306.00
Principal	Kristine Ajrouch (Research Center for Group Dynamics, ISR)		
Investigator/Clients	Toni Antonucchi (Life Course Development Program, SRC)		
	Laura Zahodne (Life Course Development Program, SRC)		
Funding Agency			
IRB	*HUM#:* HUM00199306		*Period of Approval:* 9/5/2023 - 9/4/2024
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	The participants in this study will be Arab American men and women aged 65+ as well as non-Arab men and women aged 65+ from the Social Relations Study (SRS) (HUM00187453) living in the metropolitan Detroit area who have participated in the Detroit Aging and Memory Project (D-AMP) (HUM00154638).		
	The proposed study is in response to PAR-19-070 and will test links between sociocultural experiences, brain aging, and cognitive health. The following specific aims will be accomplished by obtaining structural MRI and blood-based AD biomarker data in the Detroit-Aging and Memory Project (D-AMP). This funded parent study obtains high-quality ADRD phenotypes and genetic data on those aged 65+ from a representative sample of 600 Arab Americans, as well as panel participants (N=298) from the Social Relations Study (SRS), to compare to non-Arab Whites in the same geographic area.		
SRO Project Period	07/2024 - 05/2025		
Data Col Period	07/2024 - 05/2025		
Security Plan	NA		

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

Other Project Team Members	In addition: Tim Prand, Mouna Mana, AB Fuqua Smith, Jeff Smith, Ashwin Dey, Kelly Lieske, Valyn Dall, Andria Goedert, Megan Hromco		
Other Project Name			
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone		
DE Software	Other (Weblog)		
QC Recording Tool	DRI-CARI; Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	SRO Group		
Payment Type	Cash, prepaid ($100 respondent, $25 informant)		
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)		

Report Period	Aug, 2024 (Healthy Brain Project)	Implementing
Risk Level	Some Concerns	
Monthly Updates	The current percentage of D-Amp participants who agree to be contacted for Healthy Brain is 67%. We are having a great deal of difficulty getting interviewers and team leaders to charge their time appropriately, even though interviewers are given an indication in SurveyTrak of how to charge their time. This is an issue that we are continuing to work on. We are watching this metric carefully. If we are unable to balance D-AMP and Healthy Brain field costs, D-AMP will run out of money to fund the interviews for the 33% who do not subscribe to the Healthy Brain project.	
	Reminder: The Healthy Brain Project is being run concurrently with D-AMP, with the respondents being considered	

to be directly recruited by interviewers into the Healthy Brain Project. If, during the D-AMP interview, the respondent agrees to be contacted by the research team for the Healthy Brain Project, the case can be charged to Healthy Brain. We expect that 60 to 70% of the cases will agree to be contacted by Healthy Brain, and will be charged to Healthy Brain. Those that don't agreed to be contacted will be charged to D-AMP. This is a metric that needs to be monitored very carefully.

Special Issues	The imbalance in how interviewers are charging their time has cause large variances in monthly projections between D-AMP and Healthy Brain.	
Cost as of Sep 18, 2024	*Total Cost to Date (direct + indirect):*	400,020.69
	Est Cost at Completion (E$AC):	1,531,478.01
	Total Budget:	1,537,306.00
	Variance (Total Budget minus- E$AC):	5,827.99
	Reason for Variance:	At present, we expect that the full project budget will be spent.
Projections as of Sep 18, 2024	*Dollars Projected for Month:*	176,549.87
	Actual Dollars Used:	116,507.61
	Variance (Projected minus Actual):	60,042.26
	Reason for Variance:	This significant variance is due to interviewers and team leaders not charging their time appropriately between the D-AMP and Healthy Brain project. We are working on this issue with the field team.

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

Other Measures	The Healthy Brain Project does not have specific production goals. It is being used to help increase completes on D-AMP. Those completes will feed into the Healthy Brain Project increasing recruitment for Healthy Brain. Please see D-AMP for production progress.

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

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

Report Period	Aug, 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 endgame protocols.

2. Baseline production continued to be slow resulting in fewer interviewer hours and being below interview goal each week of August. Interviewers averaged 41 baseline iws/week although the % of baseline attempted each week in staffed areas continued to increase. Interviewers continue to work less hours than projected for baselines (average of 10 hours/week spent on baselines). 3. Several strategies were implemented near end of August to boost production (offering proxy option for 2nd R in household, re-releasing 115 EGenX and 832 MOC endgame cases to the field, implementing an endgame experiment, prioritizing baselines vs screening at the PSU level, prioritizing MOC cases in effort to reach the MOC goal of 2000 asap, offering MOC Rs a phone interview.)

3. Discussions and analysis continued to assess if additional screener sample will need to be selected and prepared for future release to achieve the EgenX goal as EGenX response rate is lower than originally projected.

4. Recruitment and training prep began for an end of September training in Grand Rapids for 61 interviewers.

*The "measures" table reflects Panel and Baseline combined as of 8/17/24. Breakdown of Panel and Baseline counts and rates in Other Measures Field.

Special Issues	-61 staff recruited for September 2024 training but goal was 80 staff which means field staff hours available for production. -Baseline interviewing continues to be slow and concerns about reaching the EGenX goal.

Cost as of Sep 18, 2024	Total Cost to Date (direct + indirect):		18,085,350.79
	Est Cost at Completion (E$AC):		18,079,706.79
	Total Budget:		19,016,630.00
	Variance (Total Budget minus- E$AC):		936,923.21
	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 Sep 18, 2024	Dollars Projected for Month:		-4,352.00
	Actual Dollars Used:		-4,176.47
	Variance (Projected minus Actual):		-175.53
	Reason for Variance:	Minimal variance.	

Measures		Units at Complete	RR	HPI
	Current Goal:	19,181	53%	12.1
	Goal at Completion:	22,215	44%	8.3
	Current Actual:	19,2077	53%	12.1
	Estimate at Complete:	20,912	42%	9.8
	Variance:	1,303	2%	1.5

Other Measures	Panel: Revised RR Goal: 68% (original goal 74%), Final RR: 68% (Panel end date 9/2/23) 2022 Baselines generated from screener: Goal: 6,003 iws; Current: 4,269 iws from 14,351 baselines spawned from screener as of 9/19/24. Current RR: 30.0%% 2019 EGenX baselines: Goal RR: 70%, Current RR: 74.4% (497 iws)

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			
Pre Production Start: 05/15/2023		*Pretest Start:* 01/29/2024	
Pretest End: 02/18/2024		*Recruitment Start:* 12/19/2023	
Staffing Complete: 03/15/2024		*GIT Start:* 04/22/2024	
SS Train Start: 04/23/2024		*SS Train End:* 04/29/2024	
DC Start: 05/13/2024		*DC End:* 05/31/2025	

Other Project Team Members	Alex Warju (Production Manager), Andrea Sims (Production Manager), Derek Dubuque (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), Dedra Campbell (Project Manager), Chelsea Graham (Project Manager), Melissa Luker (Project Assistant), Anthony Romanowski (Project Manager), Megan Hromco (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

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Report Period	Aug, 2024 (HRS 2024)	Implementing
Risk Level	On Track	
Monthly Updates	-HRS 2024 activities continued with cost projections, technical specifications, technical development, testing, precontact mailing preparations, and pre-pay check processing. -Testing resumed for Web Panel in August. Web Panel will launch after SRO receives the production fix to a Blaise issue, and data model 3 is delivered to SRO. (Pending IRB approval for new prescription drug lab results linkage.) -Training and recruitment planning continued in preparation for an October 2024 training of ~80 interviewers. -Additional sample was delivered to SRO at the end of August (amount of sample ~1,600). Blaise preload	

estimated to be delivered end of September. Release scheduled for after the October training.
-Production has been going well. Interviewers have exceeded hours and interview goals in all but one week of August. Holiday weekend impacted production.

Measures in table below are as of 9/19/24.

Special Issues				
Cost as of Sep 18, 2024	*Total Cost to Date (direct + indirect):*			6,342,039.98
	Est Cost at Completion (E$AC):			21,478,126.97
	Total Budget:			21,477,508.00
	Variance (Total Budget minus- E$AC):			-618.97
	Reason for Variance:	Minimal variance. Change since last month is due to updating field iwer projections until the end of data collection.		
Projections as of Sep 18, 2024	*Dollars Projected for Month:*			1,603,301.51
	Actual Dollars Used:			1,286,195.26
	Variance (Projected minus Actual):			317,106.25
	Reason for Variance:	Variance is due to April training invoice has not been delivered to SRO yet, respondent payments, and travel. Projections are being pushed forward.		

Measures		Units at Complete	RR	HPI
	Current Goal:	4,525	21.5%	7.0
	Goal at Completion:	17,341	70%	9.3
	Current Actual:	4,455	21.2%	8.0
	Estimate at Complete:	17,341	70%	9.3
	Variance:	0	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	David Weir (SRC)		
Investigator/Clients	Helen Levy (SRC)		
	Ken Langa (SRC)		
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Evanthia Leissou		
	Budget Analyst: Richard Warren Krause		
	Production Manager:		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Andrew L Hupp		
	Production Manager 2: Theresa Camelo		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample.		
SRO Project Period	02/2021 - 08/2024		
Data Col Period	03/2022 - 06/2024		
Security Plan	NA		

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

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

Report Period	Aug, 2024 (HRS2022-Screening)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Screening continues at a steady pace. We've been exceeding both production and effort (hours) goals on screening. Release 7 is in the field. DMSS is in the process of preparing Release 8 so we can mail web invitations in early October and release to the field as necessary.	
	We have released 14,588 cases to the endgame protocol. 1,217 cases (8.3%) of cases have completed a screener. 124 cases (10.1%) completed via the web, and 1,090 (90.0%) of cases completed in-person. Flagging of endgame cases has continues.	
	Replicates 3 and 4 have been sorted. Paul is doing QC checks on those (this will be release 8). Sorting on replicate 5 is mostly complete, and sorting on replicate 6 is underway.	
Special Issues		

Cost as of Sep 18, 2024	Total Cost to Date (direct + indirect):		26,468,115.77
	Est Cost at Completion (E$AC):		34,960,555.35
	Total Budget:		28,919,242.00
	Variance (Total Budget minus- E$AC):		-6,041,313.35
	Reason for Variance:	Projections have been entered through March 2025 (projection of when we would meet the baseline production goal).	
Projections as of Sep 18, 2024	Dollars Projected for Month:		1,054,838.68
	Actual Dollars Used:		498,150.24
	Variance (Projected minus Actual):		556,688.44
	Reason for Variance:	Variance due to the invoice from the May training has not yet been sent to SRO, respondent payments, and travel. Unused projections were pushed forward.	

Measures		Units at Complete	RR	HPI
	Current Goal:	7,017/3,645 HHs	73%	3.0
	Goal at Completion:			
	Current Actual:	5,280/3,987	46.8%	2.85
	Estimate at Complete:			
	Variance:			

Other Measures

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

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

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

Report Period	Aug, 2024 (IHDS3)	Closing

Risk Level	On Track
Monthly Updates	Worked on deliveries that include the following: 1. 29 (ST Projects) X 12(Data models) Merges/Data Out, resulting in 324,800 SIDS completed 2. 29 (ST Projects) x 8(Data models) QC Timings Reports 3. 29 (ST Projects) Webtrak Excel Reports 4. 29 (ST Projects) x 4(different unique reports) FPR Reports 5. 29 (ST Projects) Final Result Codes Reports 6. 29 (ST Projects) Call Records Reports 7. 29 (ST Projects) x 8 (data models) X 2(languages) Code Books 8. 15 (ST Projects) ADT Reports - one report per ST Project 9. 8(Data Models) Stand Alone Blaise Data Models with Client provided Test Scenarios 10. Provided copies of all CARI files 11. SurveyTrak Database backup and ST admin to allow Client to access blobs on their own server Pending delivery of data out of all suspended cases that were not coded 1005's.

Special Issues	Wave 3 funding balance ended at -$18,833.61 direct and indirect costs (-$12,072.53 Direct))	
Cost as of Sep 18, 2024	*Total Cost to Date (direct + indirect):*	690,056.26
	Est Cost at Completion (E$AC):	693,968.66
	Total Budget:	694,143.53
	Variance (Total Budget minus- E$AC):	174.87
	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. There will be less then $200 left once all financials are processed.

Projections as of Sep 18, 2024	*Dollars Projected for Month:*	7,902.71
	Actual Dollars Used:	5,556.02
	Variance (Projected minus Actual):	2,346.69
	Reason for Variance:	Overall variance will minimal.

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

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

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

Other Project Team Members	Gary Hein: Project Lead 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	Aug, 2024 (LHMS 2023 Fall)	Implementing
Risk Level	On Track	
Monthly Updates	Finance is billing all LHMS activity to the to Spring shortcode. Fall shortcode being kept open for voided checks and the final dataforce invoice.	
Special Issues		
Cost as of Sep 18, 2024	*Total Cost to Date (direct + indirect):*	336,840.35

	Est Cost at Completion (E$AC):			264,760.35
	Total Budget:			505,359.00
	Variance (Total Budget minus- E$AC):			240,598.65
	Reason for Variance:	Staffing for reminder calling did not meet original projections and lower response rates than anticipated are resulting in lower costs across the project.		
Projections as of Sep 18, 2024	Dollars Projected for Month:			0.00
	Actual Dollars Used:			3,872.32
	Variance (Projected minus Actual):			-3,872.32
	Reason for Variance:	Final invoice from dataforce was not included in fall projections.		

Measures		Units at Complete	RR	HPI
	Current Goal:	2063	54%	N/A
	Goal at Completion:	2063	54%	N/A
	Current Actual:	671	17%	N/A
	Estimate at Complete:	671	17%	N/A
	Variance:	1392	37%	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	The HRS Life History Mail Survey (LHMS) is part of the Health and Retirement Study. The goal of LHMS is to collect retrospective life histories of HRS participants to address multidisciplinary need for information about events, residential location, and education over the entire life course. Information like this allows researchers to understand how individuals' pasts shape their health and economic situations today. A paper questionnaire will be mailed to a sample of approximately 2,288 HRS Respondents. From this sample, approximately 1,242 completed surveys are expected (54% response rate). For the reminder protocol, 495 respondents have been designated to receive a reminder by postcard. The remaining 1,793 respondents will receive reminders by phone to complete the questionnaire. When a respondent is reached by phone, SRO will attempt to complete the 60-minute interview by telephone. Thank you postcards will be mailed to respondents who return a completed questionnaire.		
SRO Project Period	04/2023 - 12/2023		
Data Col Period	06/2023 - 09/2023		
Security Plan	NA		

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

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

Report Period	Aug, 2024 (LHMS 2023 Spring)	Implementing
Risk Level	On Track	
Monthly Updates	August Activities and Notable Events for Spring and Fall: 1 - SAQs received, logged and forwarded to study staff for processing 2 - Monthly budget projection meeting with financial analyst 3 - LHMS update meeting with HRS staff 4 - Coding by SRO Staff	
Special Issues	Finance wants to bill current/future fall activities to the spring shortcode	

Cost as of Sep 20, 2024	Total Cost to Date (direct + indirect):		229,404.33
	Est Cost at Completion (E$AC):		240,189.62
	Total Budget:		457,922.00
	Variance (Total Budget minus- E$AC):		217,732.38
	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 Sep 20, 2024	Dollars Projected for Month:		11,602.82
	Actual Dollars Used:		3,756.19
	Variance (Projected minus Actual):		7,846.63
	Reason for Variance:	Variance due to delay in coding. The data was delivered mid-July to SRO but HRS 2022 coding became a higher priority.	

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:	358	18%	N/A
	Variance:	695	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**: 792,443.00	**Indirect Budget:** 206,037.00	**Total Budget:** 998,480.00

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

Milestones	***Pre Production Start:***	***Pretest Start:***
	Pretest End:	***Recruitment Start:*** 06/01/2023
	Staffing Complete:	***GIT Start:***
	SS Train Start: 07/28/2023	***SS Train End:*** 07/29/2023
	DC Start: 09/14/2023	***DC End:*** 02/18/2025

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

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

Risk Level	On Track

Monthly Updates	Cohort 2
	 - Release 1-8 is complete.
	 - Releases 9-16 launched 4/23/2024 for English and Spanish, 5/15 for Arabic
	   - We now have 6 Arabic IWs out of the 9 total lines and have stopped attempting to get more.
	   - REL 9 reminder calling ended Aug 5th with a 65.8% RR. We received permission to extend reminder calling 1 additional week and ended with 73.36% RR.
	     - REL 10 and 11 reminder calling was extended as well and ended with 74% and 78.9% RR respectively.
	     - REL 12 Ended reminder calling on 9/16 without being extended with a 77.3% RR.
	     - REL 13 to 16 are still be called on but are doing well (72.2%, 67.2%, 71.1%, and 69.8% RR)
	       - REL 14, 15, and 16 have are still yet to employ the $50 endgame which should help escalate their RR.
	       - Reminder calling ends Nov 18th with no plans to extend based on the current RR.
	       - COG calling will be needed minimally through Feb 18 at which point we will close field.
	
	Continued to investigate minor Blaise bugs and it turned out to be caused by the Blaise update and a manupula script that needed updating. Once updated, we have not seen any new glitches.
	
	No current concerns!

Special Issues	

Cost as of Sep 18, 2024	*Total Cost to Date (direct + indirect):*		746,603.02
	Est Cost at Completion (E$AC):		817,984.27
	Total Budget:		998,480.00
	Variance (Total Budget minus- E$AC):		180,495.73
	Reason for Variance:	Carry Forward from FO1 included and fewer hours spent on the project than projected.	
Projections as of Sep 18, 2024	*Dollars Projected for Month:*		81,911.54
	Actual Dollars Used:		72,187.89
	Variance (Projected minus Actual):		9,723.65
	Reason for Variance:	This month underrun was mainly due to Respondent payments.	

Measures		Units at Complete	RR	HPI
	Current Goal:	3550	75%	3
	Goal at Completion:	3650	80%	6
	Current Actual:	3520	75%	6.0
	Estimate at Complete:	3650	77%	6.5
	Variance:	0	-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 and agreed to participate. MoCA is currently .69 HPI			

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

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

Other Project Team Members	Hueichun Peng Technical Lead (WebSMS and 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	Aug, 2024 (MTF Base Year 2022_27)	Implementing
Risk Level	On Track	
Monthly Updates	August 2024 - Preparing for five interviewers to assist with school recruitment. They will use a mix of systems, including	

accessing letters/enclosures generated for each school through the terminal server. Some small changes to SurveyTrak will needed for this work (including some additional result codes).
- Max continues to work alongside Hueichun to learn the MTF systems to enable him to become Hueichun's back-up when needed.

Special Issues

Cost as of Sep 12, 2024	*Total Cost to Date (direct + indirect):*	2,875,574.89
	Est Cost at Completion (E$AC):	7,143,616.77
	Total Budget:	9,778,060.00
	Variance (Total Budget minus- E$AC):	2,634,443.23
	Reason for Variance:	Projections for Funding period 2022 – 2027 (latest client report has been uploaded to MPR) Current projections result in an under spend for the five year grant period. The projected costs are based on completion of 325 schools in years 2024 – 2027 (we were projecting costs for 400 schools) and all in-person. Illume charges have been removed from projections from 2024 onwards. A portion of the hours for work involved in transitioning MTF surveys to Qualtrics are being charged to the Illume recharge account. Primary reason for the under spend and plans for SRO funding: Projections for the five year period are based on current scope of work and the adapted protocol (introduced in 2021). The budget prepared for the proposal was based on the pre-pandemic design. The adapted protocol brings savings in the following categories: interviewer hours, travel, shipping and staff time (specifically hours required for loading and preparing tablets for shipping). For the past few years the number of schools recruited and passed to SRO has been lower than the number used for this budget (n=390). In response, MTF (SRC) have reduced our funding for the first two years. We have received (from MTF) $1,843,080 (Y1) and $1,143,890 (Y2) a total reduction of $815,581. Going forward, the current plan is to fund Year 3 and 4 based on the budgeted amount - if there is significant underspending MTF will reduce SRO's Year 5 award. SRO Finance group feels that we should continue to report/monitor using the original budgeted amount because this is not an official reduction in budget. We are keeping the client (via Nick Prieur) informed of actual and projected spend through a monthly cost report.

Projections as of Sep 12, 2024	*Dollars Projected for Month:*	21,319.92
	Actual Dollars Used:	26,227.52
	Variance (Projected minus Actual):	-4,907.60
	Reason for Variance:	SD August hours deleted in error - this is the main source of the variance.

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: Hongyu Johnson		
	Production Manager 2:		
Proposal #	no data		
Description	MTF Early Panel study is a study that will survey drug use in 9th and 11th graders who were 8th and 10th graders in 2023 wave baseline recruited samples. SRO will launch the 2024 and 2025 Web survey data collections with an estimated sample size of 600 cases per wave of data collection. Although originally proposed, no reminder calling will be carried out on the early panel sample. This budget assumes an overall SRO involvement period of 20 months commencing in March 2024 with the data collections taking place during a 4-month period (for each wave), beginning in May 2024 (for Wave 1) and May 2025 (for Wave 2).		
SRO Project Period	07/2023 - 12/2025		
Data Col Period	04/2024 - 08/2025		
Security Plan	NA		

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

Other Project Team Members	Rebecca Gatward (SPA), Donnalee Grey-Farquharson (Lead), Hueichun Peng, Shaowei Sun, Hongyu Johnson, Brad Goodwin, Edward Green
Other Project Name	
Sample Mgmt System	Web SMS
Data Col Tool	Other (Qualtrics)
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, R
Administration	ISR Group (MTF Staff)
Payment Type	Other (Tango Card)
Payment Method	Other (Check mailed MTF Staff)

Report Period	Aug, 2024 (MTF Early Panel Pilot)	Implementing
Risk Level	On Track	
Monthly Updates	We had minimum activities during August. No new completes since June. The total completes is 25 cases, we received 14 parental consents; of those, one survey is in progress and 13 cases have not started the surveys.	

Special Issues		
Cost as of Aug 31, 2024	**Total Cost to Date (direct + indirect):**	99,973.73
	Est Cost at Completion (E$AC):	268,167.66

	Total Budget:			288,529.00
	Variance (Total Budget minus- E$AC):			20,361.34
	Reason for Variance:	The underrun amount due to staff reduced hours to support another project that will be from August through March 2025. We will make adjustments in the next few months.		
Projections as of Aug 31, 2024	Dollars Projected for Month:			14,462.34
	Actual Dollars Used:			12,235.37
	Variance (Projected minus Actual):			2,226.97
	Reason for Variance:	staff reduced hours to support another project that will be from August through March 2025.		

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 Investigator/Clients	Megan Patrick (UM-SRC)		
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: Hongyu Johnson		
Proposal #	no data		
Description	Since 1975 the MTF survey has measured drug and alcohol use and related attitudes among adolescent students nationwide. A nationally representative sample of survey participants report their drug use behaviors across three time periods: lifetime, past year, and past month. The survey is funded by the NIDA, a component of the National Institutes of Health (NIH), and conducted by the University of Michigan. MTF has two linked projects, MTF Main surveys students in schools, and MTF Panel surveys adults across the lifespan. MTF Panel conducts data collection between April and October each year. In 2024 MTF moved from DatStat.Illume web surveys to Qualtrics. Each year over 20,000 participants are invited to complete a survey with push-to-web followed by paper survey modes. Invitations are mailed in April. Non-response calling begins in May and runs through August. Several hard copy and email reminders are sent throughout the data collection window. Both the separately funded Winter Location calling effort and Non-Response follow-up calling will be integrated with the standard MTF activities. Panel participants are sent study newsletters each year in December. Participants whose newsletter is returned undeliverable by the USPS are sent for location calling Mid-January through February.		
SRO Project Period	01/2022 - 03/2027		
Data Col Period	04/2022 - 10/2026		
Security Plan	NA		

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

Other Project Team Members	Rebecca Gatward (SPA), Donnalee Grey-Farquharson, Lloyd Hemingway, Dave Dybicki, Max Malholtra, Hueichun Peng, Shaowei Sun, Peter Sparks, Ashwin Dey, Hongyu Johnson, Brad Goodwin, Edward Green.
Other Project Name	MTF
Sample Mgmt System	Web SMS
Data Col Tool	Other (Qualtrics)
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, R
Administration	ISR Group (MTF Staff)
Payment Type	Check, prepaid; Check, post
Payment Method	Other (MTF Staff mails check)

Report Period	Aug, 2024 (MTF Panel　2022-27)	Implementing
Risk Level	On Track	
Monthly Updates	We had minimal activities during August. We extended the data collection until Oct 25, 2024. The MTF study team has received an initial data set that they reviewed - no issues. The Non-response Calling project successfully ended on 8/20/2024. In RLM, Lloyd and Peter have been fixing some bugs related updating the display for the round (how many times) an R has been called. Finally, LabSMS is preparing CATI updates to Blaise 4.8 for the next wave of Winter Location project. As of 8/31/2024, we had RR of 45.03%.	

Special Issues

Cost as of Aug 31, 2024	Total Cost to Date (direct + indirect):	1,909,669.69
	Est Cost at Completion (E$AC):	4,027,502.60
	Total Budget:	3,895,217.00
	Variance (Total Budget minus- E$AC):	-132,285.60
	Reason for Variance:	The overrun amount has been reduced since July 2024. We will continue to make projection adjustments in the next months to ensure that the project remains on track. MTF Staff is aware of the deficit - this information is included the monthly report they receive from SRO.
Projections as of Aug 31, 2024	Dollars Projected for Month:	130,161.68
	Actual Dollars Used:	125,740.89
	Variance (Projected minus Actual):	4,420.79
	Reason for Variance:	During the non-response calling period, the actual hours worked by Survey Tech staff, though a little off, was very close to the projected hours.

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

Other Measures

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

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

Other Project Team Members	Lisa Holland, Gregg Peterson, Raphael Nishimura, Ji Qi, Anna Fuqua-Smith, Liliana Grueber, Dominic Bonanni,
Other Project Name	
Sample Mgmt System	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Aug, 2024 (NDWS)	Implementing
Risk Level	On Track	
Monthly Updates	August activities: * August's big news was the launch of data collection for the nursing home, assisted living, and home care administrator surveys, and pre-data collection sample updating for the community clinician survey in the second half of the month.	

* This occurred after each participating site (DLH/RTI) had their individual IRB approvals. IRB approvals have been very slow to be processed so we will continue to build in additional time for IRB amendments in the future.
* Ahead of production launch, we completed testing and signed off on the 7 web surveys and 2 PAPI surveys (1 of the 2 final PAPI surveys was finalized/reviewed in early Sept).
* We continued working with our data collection partners about reporting & dashboards; we established a simple production report Google Sheet for our partners to report weekly progress while their automated reports get set up.
* We restarted Year 2 sample frame development for the assisted living facilities and home care agencies, including working with the PIs and experts on studying health care workforce to help us with approaches to identifying home care agencies.
* We welcomed two new SRO staff to the NDWS team: Chia Chye Yee and Dan Tomlin.
* The project discussed new scope for Year 2 data collection, presenting the idea to the data collection partners for feedback and to discuss rebudgeting plans. The scope includes reinterviewing 100 facility/agency administrators in each HC, AL, and NH surveys in year 2. The survey would be based upon the year 1 survey, but optimized for the re-interview. Additional revised/"new" scope includes doing non-response follow-up with the clinician sample.

Special Issues	We learned in September that we will not have to do a RFP for Years 3-5 data collection assuming we want to continue partnerships with our current data collection partners (and they want to continue data collection). We have not yet discussed this with either partner.		
Cost as of Sep 18, 2024	*Total Cost to Date (direct + indirect):*		558,047.46
	Est Cost at Completion (E$AC):		4,878,415.73
	Total Budget:		6,750,973.00
	Variance (Total Budget minus- E$AC):		1,872,557.27
	Reason for Variance:		
Projections as of Sep 18, 2024	*Dollars Projected for Month:*		132,448.42
	Actual Dollars Used:		81,598.92
	Variance (Projected minus Actual):		50,849.50
	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	*Pre Production Start:* 10/01/2021	*Pretest Start:* 02/05/2024
	Pretest End: 03/11/2024	*Recruitment Start:*
	Staffing Complete:	*GIT Start:* 01/30/2024
	SS Train Start: 01/31/2024	*SS Train End:* 02/02/2024
	DC Start:	*DC End:*

Other Project Team Members	Shonda Kruger-Ndiaye & Camila Kendall -- Co-Project Leads 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	Aug, 2024 (PR-PSID)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Main focus was on pretest data extraction and processing -- SRO continued to make progress with PI on pretest data extraction and processing. No update on Americorp or USDA funding. Worked with DMSS to refine projections for sampling work, which is scheduled to begin in September. Blaise Programming and MDC pre-production ramp up will begin in October.	

Special Issues	Same as last month -- overrun and uncertainty around PCP work scope which is new to SRO.		
Cost as of Sep 18, 2024	*Total Cost to Date (direct + indirect):*		611,137.05
	Est Cost at Completion (E$AC):		1,487,429.46
	Total Budget:		1,292,585.00
	Variance (Total Budget minus- E$AC):		-194,844.46
	Reason for Variance:	Projected cost to complete increased by ~1.5K between July - Aug, due to fringe rate fluctuation.	
Projections as of Sep 18, 2024	*Dollars Projected for Month:*		7,170.29
	Actual Dollars Used:		4,501.07
	Variance (Projected minus Actual):		2,669.22
	Reason for Variance:	Sampling work projected to begin in August will not begin until September at the earliest. Projections were moved forward.	

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	*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	Shonda Kruger-Ndiaye -- PSID Suite Lead Rachel Orlowski -- 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	Aug, 2024 (PSID 2025 OCU)	Implementing
Risk Level	On Track	
Monthly Updates	SRO completed second round of Prod Data test -- PSID signed off on 8/8. PSID delivered the Batch 1 preload file on 8/15 (expected 8/12). Sample Load/Release took longer than expected. PAU timed out when the process was started on 8/19 due to the server update overnight. Process restarted on 8/20 but did not finish until 8/22 due to the size of the replicate. Will load sample in smaller replicates going forward. All sample was released by 8/22. PCM mailed all of the batch 1 cards by 8/27.	

A data issue was discovered on 8/26. The study type variable (PSID or TAS) was preloaded into all Email 2 fields, including for lines that should have actual Email2 value (n=174). Jude quickly identified the issue and created a script to correct the preload, and Ed implemented the fix within a few hours. However, on 8/27 PSID reported that the issue had not been fully resolved. There were still a handful of cases that had not been fixed. Jude determined that these were lines completed before we fixed the data in the preload field, and was able to quickly resolve the issue for these last few cases.

As of 9/20, 829 Web completes.

Special Issues				
Cost as of Sep 18, 2024	*Total Cost to Date (direct + indirect):*			58,107.69
	Est Cost at Completion (E$AC):			82,023.97
	Total Budget:			81,686.00
	Variance (Total Budget minus- E$AC):			-337.97
	Reason for Variance:	Added projections for data management for loading/releasing second batch of sample.		
Projections as of Sep 18, 2024	*Dollars Projected for Month:*			4,746.56
	Actual Dollars Used:			4,081.34
	Variance (Projected minus Actual):			665.22
	Reason for Variance:	Programming actuals were less than projected.		

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

Other Measures

Project Name	**(PSID CDS 2023) PSID Childhood Development Supplement 2023 (On Track)**		
Project Mode	Primary: Mixed	Secondary: Face to Face	Total of Modes: 4
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 4,668,918.57	**Indirect Budget:** 2,611,762.00	**Total Budget:** 7,280,680.57
Principal Investigator/Clients	Narayan Sastry (SRC)		
Funding Agency			
IRB	*HUM#:* HUM00166316		*Period of Approval:*
Project Team	*Project Lead:* Piotr Dworak		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager: Sarah Crane		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	A 2023 wave of the Childhood Development Supplement (CDS) is going to be conducted in two phases. Phase 1: from September 2023 – May 2024 and Phase 2: from June 2024 - January 2025. The sample for CDS is comprised of the PSID-eligible children (ages 0 -17) from the Core 2023 families we interview and their primary caregivers. Approximately 3,700 families will be included, with some Core families containing several CDS children. As part of the CDS Phase 1, families are asked to complete phone coverscreen and PCG interviews followed by mixed Adolescent 12 - 17 phone/web interview (including an IVR component in phone mode). In Phase 2 families will be visited in person (where possible) and asked to complete Child 8 - 11 interviews (via Video if out of area), provide physical measurements, educational assessments, saliva collection, time diaries, school and birth record linkage forms. CDS interviewing will be conducted by a mix of SSL and Field interviewers. Coverscreen and PCG interviews will be handled by SurveyTrak and Blaise 4.8, Adolescent interviews will be handled by MSMS and Blaise 5.		
SRO Project Period	08/2022 - 01/2025		
Data Col Period	09/2023 - 01/2025		
Security Plan	NA		

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

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

Report Period	Aug, 2024 (PSID CDS 2023)	Implementing
Risk Level	On Track	
Monthly Updates	This is CDS Phase 1 update. CDS Phase 2 update is entered separately.	

This is CDS Phase 1 update. CDS Phase 2 update is entered separately.

CDS Phase 1 data collection is in week 36. We completed Coverscreen (summary below) but extended PCG and adolescent data collection to allow for max response rates while not extending the project too far into the future. PCG data collection is scheduled to end on October 13 and Adolescent data collection is scheduled to end on October 27th.

Our current goals and progress:
-- CS: ended on 9-8 completing 2,556 interviews and achieving 80.1% RR matching results CDS-21. 77.3%.
-- PCG: completed 2211 and need another 94 in the next 3 weeks to achieve 90% response rate.
-- Adolescent: completed 1026 and need another 120 to achieve similar response rate to CDS-21.

Data Collection Staff:
Our iwer staff count declined after consolidation and transition to ANES. We currently have 31 interviewers which is adequate level of staffing for our planned end-game activities.

Special Issues		
Cost as of Sep 18, 2024	*Total Cost to Date (direct + indirect):*	3,539,906.40
	Est Cost at Completion (E$AC):	5,700,939.67
	Total Budget:	7,280,680.57
	Variance (Total Budget minus- E$AC):	1,579,740.90
	Reason for Variance:	Projections have been updated through the end of the project and we expect the current underrun to hold.
Projections as of Sep 18, 2024	*Dollars Projected for Month:*	532,482.19
	Actual Dollars Used:	347,998.26
	Variance (Projected minus Actual):	184,483.93
	Reason for Variance:	CDS monthly work has been split between Phase 1 and Phase 2 and some of the underrun is a consequence of splitting time between two workflows. We are also underrunning interviewer time which has been adjusted for the future weeks.

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 CDS23 Phase 2) PSID Childhood Development Supplement 2023 Phase 2 (Some Concerns)**		
Project Mode	Primary: Mixed Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 1,618,383.00	**Indirect Budget:** 906,295.00	**Total Budget:** 2,524,678.00
Principal Investigator/Clients			
Funding Agency			
IRB	*HUM#:* HUM00166316		*Period of Approval:*
Project Team	*Project Lead:* Camila Kendall		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager: Sarah Crane		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Barbara Aghababian-Homburg		
	Production Manager 2: Carolyn Vieira-Martinez		
Proposal #	no data		
Description	Primary Caregivers (PCG) with children aged 5+, who completed Phase 1 of CDS (the phone interview) will be invited to provide a saliva sample during phase 2. The SSL will assemble kit mailings that will be shipped to respondents in weekly releases. Field interviewers will follow up via phone, email, and text to encourage participation. Additionally, Field IWERs will make FTF visits to pick up saliva samples, and offer cash payments.		
SRO Project Period	06/2024 - 02/2025		
Data Col Period	09/2024 - 01/2025		
Security Plan	NA		

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

Other Project Team Members	Project Lead -- Camila Kendall Field Production Management -- Sarah Crane & Barb Aghababian-Homburg SSL Production Management Lead (Assembly & Logging) -- Carolyn Vierra-Martinez SSL Production Management Support (Assembly & Logging) -- Ian Woods Project Management Support -- Xiomara Lorenzo-Guerra, Nahid Sultana Tech Lead -- Jeff Smith PDMG Tech Lead -- Ian Ogden
Other Project Name	CDS Saliva Collection
Sample Mgmt System	SurveyTrak
Data Col Tool	NA
Hardware	Laptop; [UM cell] Phone
DE Software	NA
QC Recording Tool	N/A
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Aug, 2024 (PSID CDS23 Phase 2)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Confirmed sample eligibility criteria with PI -- Will only include PCGs in Phase 2 if all components of phase 1 (PCG & adol IWs) have been completed. Core PIs are concerned about respondent burden and want to ensure there is a break between CDS Phase 2 and Core launch. Confirmed plan for data collection period -- will now be 19 weeks and will end the week of 1/26, instead of the end of Feb. Also confirmed the data collection protocol -- planning for a maximum of 15 attempts total across all modes (Text, Email, Phone). For local sample, we will not go FTF unless the PCG requests cash payment. Worked on Sample assignments for 1st batch of sample. PSID will provide sample in three batches -- second batch expected in Oct, third batch will be delivered in early Nov after CDS Phase 1 ends.	

IRB amendment submitted on 8/28 -- Amendment was subsequently resubmitted on 9/16 and approved on 9/17.

IWER training planned for 9/16 and 9/26. First session will cover a phase 2 overview, second session will be focused on SurveyTrak and specific field protocols.

Original Timeline (as of 9/23, project has not yet launched).
Rel 1 Prenotification letters sent on 9/13
Rel 1 Prenotification batch email/text sent on 9/16
Rel 1 Kits mailed 9/20
Iwer production begins 9/26

Additional activities include ST and Weblog testing, procurement for kit assembly, finalizing staff list and sample assignment/release schedule, preparing for SSL assembly & logging trainings.

Special Issues	Qualtrics/Tango API is new to the PSID suite -- funding delays impacted testing timeline. As of 9/23, the project has not yet launched due to the delays in funding the Tango account and testing the Tango/Qualtrics API integration.			
Cost as of Sep 17, 2024	*Total Cost to Date (direct + indirect):*			197,668.08
	Est Cost at Completion (E$AC):			1,748,558.27
	Total Budget:			2,524,678.00
	Variance (Total Budget minus- E$AC):			776,119.73
	Reason for Variance:	PIs decreased work scope after budgeting. Data collection period is shorter, and we are planning for fewer IWER attempts.		
Projections as of Sep 17, 2024	*Dollars Projected for Month:*			181,932.21
	Actual Dollars Used:			65,927.40
	Variance (Projected minus Actual):			116,004.81
	Reason for Variance:	Underrun in Mgt hours. Non-sal costs projected in August have not hit the project yet (duplicating, assembly supplies)		

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

Other Measures

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

Milestones		
Pre Production Start: 05/01/2023	*Pretest Start:*
Pretest End:	*Recruitment Start:* 07/23/2023
Staffing Complete:	*GIT Start:* 10/03/2023
SS Train Start: 10/02/2023	*SS Train End:* 10/06/2023
DC Start: 10/03/2023	*DC End:* 06/01/2024

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	Aug, 2024 (PSID TAS 2023)	Closing
Risk Level	On Track	
Monthly Updates	August Project Updates	
	Management: The project team is following up with a few cases where a token of appreciation is sent but mailing token returned as undeliverable.	
	Coordinating with TSG to ensure final project archiving remains on the groups radar to take place in September. No concerns with the availability of staff to complete this task.	
	Other	

Coding: Ongoing and on track for an October delivery to the PI study team.

Special Issues

Cost as of Sep 18, 2024	*Total Cost to Date (direct + indirect):*		1,350,639.69
	Est Cost at Completion (E$AC):		1,369,448.82
	Total Budget:		1,457,428.00
	Variance (Total Budget minus- E$AC):		87,979.18
	Reason for Variance:	The biggest driver of this reduction is due to fewer hours needed across tech and management categories.	
Projections as of Sep 18, 2024	*Dollars Projected for Month:*		10,162.22
	Actual Dollars Used:		7,670.17
	Variance (Projected minus Actual):		2,492.05
	Reason for Variance:	The biggest driver of this decrease was due to less hours worked for the SSI and Project Associate Management categories.	

Measures

	Units at Complete	**RR**	**HPI**
Current Goal:	2449	89%	3.6
Goal at Completion:		89%	
Current Actual:	2449	89%	3.5
Estimate at Complete:	2449	89%	3.6
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	Katherine McGonagle (UM-SRC-PSID)		
Investigator/Clients	Narayan Sastry (UM-SRC-PSID)		
	Esther Friedman (UM-SRC-PSID)		
Funding Agency			
IRB	*HUM#:* HUM00062417		*Period of Approval:* 3/22/22-3/21/24
Project Team	*Project Lead:* Rachel Anne Orlowski		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager: Stacy Quisenberry		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Daric Thorne		
	Production Manager 2: Shonda R Kruger-Ndiaye		
Proposal #	no data		
Description	The Panel Study of Income Dynamics (PSID--also known to Respondents as the Family Economics Study or FES) is a longitudinal survey of several thousand individuals and their families, carried out since 1968 and conducted every two years. The sample is comprised of respondents from the 4,800 original families as well as new (immigrant) sample added in 1997/1999 and 2017/2019. The total 2023 sample size will be approx. 11,200, with approx. 9,650 completed interviews expected. Most of the information collected is about family composition and changes (marriages, divorces, births, deaths, people moving in and out); income sources and amounts; employment and pensions; and wealth. There are also questions about housing; education; vehicles; health; fertility; COVID-19; and money spent on food, healthcare, and school. The main focus is on how these family composition and financial factors interact with each other and how they change over time. The survey will be administered via web and telephone, with the expectation that more surveys will be completed via web than telephone (which will be a first for the study). During the 2023 wave, saliva samples will be collected for the first time on PSID Core. The Core interview must be completed to be eligible for saliva collection. Saliva sample participants that are eligible for collection during Core are adults related to Child Development Supplement (CDS) children but do not live with them. Interviewers will be trained on both the interview and saliva collection protocols. Both data collection efforts will be managed in the same MSMS project. The 2023 waves of CDS and the Transition into Adulthood (TAS) will follow PSID Core data collection. CDS and TAS eligibility is dependent upon completion of PSID Core.		
SRO Project Period	03/2022 - 09/2024		
Data Col Period	03/2023 - 04/2024		
Security Plan	NA		

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

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

Report Period	Aug, 2024 (PSID23)	Implementing
Risk Level	On Track	
Monthly Updates	Summary of August 2024 Activities Saliva Collection Delivered final data sets (and revisions) on 8/1, 8/9, and 8/16. With help from DMSS, discussed sample eligibility with PSID PIs and staff on 8/28. PIs decided to consider all participants with sample collected during prior waves of CDS as non-sample and participants without prior collection as sample, even if we did not release them on PSID 2023 (e.g., due to budget constraints). Held close out meeting with PSID PIs, BSL, & SRO on 8/29. Preparing to close the project at SRO--including inventorying supplies.	
Special Issues	Saliva data collection (including FTF visits) started later than originally planned. Saliva RR short of budgeted target (44%).	

Cost as of Sep 16, 2024	***Total Cost to Date (direct + indirect):***	5,665,412.16
	Est Cost at Completion (E$AC):	5,680,615.50
	Total Budget:	6,235,802.00
	Variance (Total Budget minus- E$AC):	555,186.50
	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 Sep 16, 2024	***Dollars Projected for Month:***	15,712.13
	Actual Dollars Used:	12,941.27
	Variance (Projected minus Actual):	2,770.86
	Reason for Variance:	Minor variation from projections this month. Note: Unable to separate Core IDC costs from Contact Update IDC costs. Cost values only reflect Direct Costs.

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

Other Measures	Notes for Measures Above: From Dashboard. Units Completed = 9189 iws (2476 CATI--27%, 6713 web--73%). Sample Invited = 10,928. BUDGET ASSUMPTIONS: Mode of completion: 60% web & 40% CATI; Of the web completes, 38% do not require any interviewer effort. HPI: 5.42 = CATI completes; 7.21 = web completes w/ interviewer follow-up; 10.17 = non-sample/non-iw. Additional 1.74 HPI for FTF NRFU cases.

Project Name	**(PSID25) Panel Study of Income Dynamics Core 2025 (On Track)**
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects
Budget	**Direct Budget**: 5,003,388.00 **Indirect Budget:** 2,801,897.00 **Total Budget:** 7,805,285.00
Principal	Tom Crossley (UM-SRC-PSID)
Investigator/Clients	Katherine McGonagle (UM-SRC-PSID)
	Narayan Sastry (UM-SRC-PSID)
Funding Agency	NSF, NIA, NICHD
IRB	**HUM#:** HUM00062417 **Period of Approval:**
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: Maureen Joan O'Brien
	Production Manager 2: Daric Thorne
Proposal #	no data
Description	The Panel Study of Income Dynamics (PSID--also known to Respondents as the Family Economics Study or FES) is a longitudinal survey of several thousand individuals and their families, carried out since 1968 and conducted every two years. The sample is comprised of respondents from the 4,800 original families as well as new (immigrant) sample added in 1997/1999 and 2017/2019. The total 2025 sample size will be approx. 11,200, with approx. 10,000 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. Talk about ancillary studies here. The 2023 waves of CDS and the Transition into Adulthood (TAS) will follow PSID Core data collection. CDS and TAS eligibility is dependent upon completion of PSID Core.
SRO Project Period	03/2024 - 09/2026
Data Col Period	03/2025 - 03/2025
Security Plan	NA

Milestones			
	Pre Production Start: 03/01/2024	**Pretest Start:** 09/16/2024
	Pretest End: 10/06/2024	**Recruitment Start:**
	Staffing Complete:	**GIT Start:**
	SS Train Start: 02/17/2025	**SS Train End:** 02/28/2025
	DC Start: 03/03/2025	**DC End:** 12/31/2025

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; Help Desk - David Bolt & Kyle Goodman; Tech Support - Sarah Broumand & Jaime Koopman; Production Support: Lorraine Bird; Project Support - Saujanya Acharya, Janet McBride, & Xiomara Lorenzo-Guerra; Reporting, Mapping, & Sample Assignment - Ji Qi & Wen Chang
Other Project Name	FES, Family Economic Study, PSID Core 2025
Sample Mgmt System	MSMS; Project specific system (68ID Site)
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	Aug, 2024 (PSID25) Implementing
Risk Level	On Track
Monthly Updates	Summary of August 2024 Activities:

PI Updates:
NSF funding was awarded in full with a 9/1/24 start date. Noura Insolera joined the Core PI team on 8/21.

IRB:
Tom and Rachel met with Mary Donnelly (IRB Staff) and Corey Zolondek (IRB Director) on 8/14. Due to the high number of amendments, high number of files, and age of the application, PSID agreed to submit a new IRB application in advance of the 2027 wave of data collection.
On 8/19, Narayan Sastry received a letter from the IRB regarding an ORIO submitted on CDS. The origin of the data issue on CDS was an interviewer error on Core that was not corrected in the CDS preload. PSID and SRO staff are working to address the communication workflow to minimize the likelihood of this occurring again.

Pretest Recruitment/Preload Builder:
The four-hour Preload Builder Training was held on August 6th and included eleven experienced interviewers. Recruitment began 8/8 and ended 8/18, as scheduled. It was successful in recruiting 117 potential Respondents and in meeting the recruitment criteria targets. Using these data, created all necessary lines for both prod data test (conducted by PSID Study Staff with real R data) and PSID Pretest.

Technical Updates:
MSMS - Iwer training freeze for systems was achieved by 8/19, though some known, pending problems were still being investigated. Schedules to implement Prod Data Test and Iwer Training projects were established and implemented. Updates to the Blaise data models regarding re-entry processes did not work as expected at first requiring updates to the Blaise DM as well as MSMS task rules, but was rectified in time for training and well before Pretest Production. Management team had additional testing time to review quality of life updates for the DCA for end user improvement, including instructions. Identified issues with some templates that prevented web links from being clicked on when to sent to AOL and Yahoo email accounts was discovered and, after some additional testing, corrected by making sure that links included https://.

Blaise - In August the Blaise upload error discovered in July was found to be much more significant, requiring additional time and review by TSG resources. Received Spanish translations for CATI and Web. Blaise programmers started Puerto Rico imports into the Blaise instrument, and started planning to tackle broader Spanish changes. Planning and discussions around implementing the PSID Info sheet on the portal. Scriptwriter was implemented for PSID Pretest Training prep. Revisions were made to the re-entry process for R's logging back into a web survey which needed to be tested ahead of pretest freeze.

68-ID Site - Work on R address data was completed early in the month, though issues were identified which were not rectified until early September. View Respondent Profiles, Family Listing Downloads, and Saving Family List notes requirements for the site were not released for testing putting a full 68-ID release well past its July deadlines. Deadlines for outstanding pieces were established week to week, but by and large were not hit.

Reports - Began discussing standard reports, agreeing that pretest only needed a small subset of reports for our work. Behind schedule in reviewing and releasing a PQT template, plans to release in September.

Training:
During August, the team was planning the Pretest Production Training to be held September 9th, 10th, 12th, and 13th, with HOPS on Wednesday, September 11. The agenda and training content was finalized. Worked to update training materials including slides, scripts, and study guides, and to test systems and update system guides accordingly with new relevant instructions and screenshots. The aim of Pretest training is to test key technical protocols and updates in preparation for Core. Core T1 training planning is also underway and will be the focus once Pretest training and production are complete.

Special Issues				
Cost as of Sep 16, 2024	**Total Cost to Date (direct + indirect):**			523,074.13
	Est Cost at Completion (E$AC):			8,169,347.55
	Total Budget:			7,805,285.00
	Variance (Total Budget minus- E$AC):			-364,062.55
	Reason for Variance:	Nearly all of the overrun is explained by projecting at a higher rate than budgeted for interviewers and survey specialists/directors. Designing data collection and training differently than budgeted -- currently estimating the impact on interviewer hours, expected to lower the interviewer effort needed. Looking for ways to streamline effort, including by expanding technical capabilities.		
Projections as of Sep 16, 2024	**Dollars Projected for Month:**			171,121.86
	Actual Dollars Used:			144,882.84
	Variance (Projected minus Actual):			26,239.02
	Reason for Variance:	The August underrun was mainly due to technical staff working fewer hours than expected.		

Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:	9,994	89%	4.73
	Current Actual:			
	Estimate at Complete:	9,994	89%	4.73
	Variance:			
Other Measures	'Current goals' will be populated as production goals are finalized. 'Estimated' goals at completion will be updated as production is underway.			

Project Name	(SAND COVID Follow-Up) Study of Adolescent to Adult Neural Development (SAND) COVID-19 Follow-up Study (On Track)		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 141,021.00	**Indirect Budget:** 78,973.00	**Total Budget:** 219,994.00
Principal	Colter Mitchell (U-M, SRC)		
Investigator/Clients	Helen Meier (U-M, SRC)		
Funding Agency			
IRB	*HUM#:* 00246902		*Period of Approval:*
Project Team	*Project Lead:* Elizabeth Ohryn		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lisa J Carn		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1: Narine Verdiyan		
	Production Manager 2:		
Proposal #	no data		
Description	The Study of Adolescent to Adult Neural Development (SAND) COVID follow-up study is a supplement of the Future of Families Child Wellbeing Study (FFCWS). FFCWS is a longitudinal research project that follows a cohort of nearly 5,000 children born in large U.S. cities in either 1998 or 2000. The study focuses on the influence of social and economic conditions in tandem with the capabilities of parents, the well-being of children, and the policies affecting disadvantaged families. SAND Neuroimaging is a supplement study to the FFCWS. The purpose of SAND Neuroimaging is to learn more about how childhood environments shape brain development and behavior from adolescence into young adulthood. Once child participants reached age 15, the study conducted MRIs and behavioral and psychological assessments. Neuroimaging takes place at regular intervals into adulthood. These assessments help in correlating brain development with cognitive abilities, emotional regulation, social skills, and other important functions. As a result of the COVID-19 pandemic, and because in-person neuroimaging was no longer an option, the FFCWS launched another study, SAND COVID-19, in 2020. The aim of this study is to gather information on familial pairs of young adults (YA) and their parent/primary caregivers (PCG) on how the COVID-19 pandemic impacted their families, households, and communities. Now, four years later, this project is conducting another wave called SAND COVID-19 Follow-up, to which SRO is contributing. This project seeks to gather self-administered Qualtrics interviews from young adult and former caregiver respondents. SRO's role is in encouraging respondents' web completions via a contact protocol including email, text, and phone reminders. If needed, we may take several additional steps to locate our sample individuals including in-depth and batch locating using a paid service such as Accurint.		
SRO Project Period	05/2024 - 11/2024		
Data Col Period	08/2024 - 10/2024		
Security Plan	NA		

Milestones			
Pre Production Start: 05/01/2024		*Pretest Start:*	
Pretest End:		*Recruitment Start:*	
Staffing Complete:		*GIT Start:*	
SS Train Start: 08/01/2024		*SS Train End:*	
DC Start: 08/05/2024		*DC End:* 10/31/2024	

Other Project Team Members	Data Manager - Brianna Sabol; Blaise Programmer - Dave Dybicki; Data Management Support: Jennie Williams; Batch Communications: Hueichun Peng and Shaowei Sun
Other Project Name	
Sample Mgmt System	SMS
Data Col Tool	Other (Qualtrics)
Hardware	Laptop; Desktop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, R
Administration	Other (SAND Project Staff)
Payment Type	N/A
Payment Method	N/A

Report Period	Aug, 2024 (SAND COVID Follow-Up)	Implementing
Risk Level	On Track	

Monthly Updates	August Update

The SAND COVID Follow-up study successfully launched production on August 5, 2024.

Data Management
- Scripts were created to import automatically completes from Qualtrics to Blaise.
- Templates and data pulls were set up for August 5 & 6 and August 16 batch emails. Careful attention to remove duplicate emails addresses where a YA and PCG may share an email to help ensure one R does not access their counterpart R's survey using an authenticated link.

Technical
- Texting using QR codes from Blaise tested and working as expected for the production launch.
- Additional Blaise adjustments happened throughout August to information displayed in the SID Blaise tabs that allow the system to push information into the counterpart R's line. This will allow references to both Rs when making locating and non-response calls.
- Additional result code refinements occurred to help clarify where an SID is at in the project protocol. For example, 1501 is being used to clarify a project text being sent and codes in the 9000s series when an iwer talked with an R and a link was sent at the end of the call.
- The development of the project FPR remains in process.

Management Team
- Additional training and protocol documents were created for training iwers for calling locating leads and non-response cases.

Data Collection
- Interviewer training took place on Thur, Aug 1. This 4-hour training focused on study information and initial study protocols.
- Production began on Mon, Aug 5 with 50 batch emails. Since emails went out as expected, the remaining batch emails and iwer sent text messages were sent on Tue, Aug 6. Production had a solid start with 611 completes and a 25% response rate.
- Non-response calling started on Tuesday, August 20. The focus of these calls is to nudge the R to complete their iw along with confirmation information on R and their counterpart.
- With just over 25% of the sample in locating, the locators who are also TLs on the project, remain focused on searching for new leads or confirming situations where R may have passed away or become incarcerated. Due to the number of cases requiring these locating searches, iwers will follow up on the leads generated.
- There is currently no interviewer attrition.

Special Issues	Sample (last MPR): The sample at the start of production includes 1297 young adults and 1233 primary caregivers. (These numbers include the sample lines described below.)

PCG Corrections: The SAND project team delivered 38 cases with incorrect PCG information. This was due to either a prior wave hard refusal, death, or incorrect contact information associated with a sample line. Outreach to lines stopped once the issue was identified. Luckily, the situation did not require an ORIO but the PI staff worked to make corrections. Corrections, including new links, took place in September.

Tango: The mechanism used to pay R was down at the start of production. This meant not all email addresses went through for the project. The PI staff worked on re-submissions and SRO worked on replying to R concerns about receiving their TOA.

Cost as of Sep 18, 2024	Total Cost to Date (direct + indirect):		81,742.17
	Est Cost at Completion (E$AC):		218,651.09
	Total Budget:		219,994.00
	Variance (Total Budget minus- E$AC):		1,342.91
	Reason for Variance:	Some project hours (project management and survey tech) are awaiting final allocations based on the finalization of when data collection will begin.	
Projections as of Sep 18, 2024	Dollars Projected for Month:		46,040.10
	Actual Dollars Used:		42,063.98
	Variance (Projected minus Actual):		3,976.12
	Reason for Variance:	ST hours are less than expected but pushed into September to catch up to both non-response calling and locating lead attempts.	

Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:	611		
	Estimate at Complete:			
	Variance:			

Other Measures	

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	The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations. The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 600 interviews.		
SRO Project Period	01/2024 - 06/2024		
Data Col Period			
Security Plan	NA		

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

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

Report Period	Aug, 2024 (SCA 2024)	Initiation
Risk Level	On Track	
Monthly Updates	The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations. The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 600 interviews.	
Special Issues		
Cost as of Sep 18, 2024	*Total Cost to Date (direct + indirect):*	678,763.04

	Est Cost at Completion (E$AC):				678,763.04
	Total Budget:				696,383.00
	Variance (Total Budget minus- E$AC):				17,619.96
	Reason for Variance:		SCA CATI is not currently in production and in the process of completing closing tasks related to archiving the project.		
Projections as of Sep 18, 2024	*Dollars Projected for Month:*				1,636.01
	Actual Dollars Used:				109.60
	Variance (Projected minus Actual):				1,526.41
	Reason for Variance:		SCA CATI is not currently in production and in the process of completing closing tasks related to archiving the project.		

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:			
	Variance:			

Other Measures

Project Name	**(SCA Web) SCA Web (On Track)**
Project Mode	Primary: Web Secondary: Web Total of Modes: 1
Project Type	Sponsored Projects
Budget	**Direct Budget**: 50,730.00 **Indirect Budget:** 0.00 **Total Budget:** 50,730.00
Principal	Joanne Hsu (Survey of Consumers - ISR)
Investigator/Clients	Tuba Suzer Gurtekin (Survey of Consumers - ISR)
Funding Agency	
IRB	*HUM#:* *Period of Approval:*
Project Team	*Project Lead:* William Keating
	Budget Analyst: Dean E Stevens
	Production Manager:
	Senior Project Advisor: Nicole G Kirgis
	Production Manager 1:
	Production Manager 2:
Proposal #	no data
Description	SCA Web is the latest iteration of data collection for the Survey of Consumers. All data collection is done through an online survey. SRO responsibilities include setup/support of technical systems, coding answers to open ended questions, and general project management support.
SRO Project Period	07/2024 - 01/1996
Data Col Period	
Security Plan	NA

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

Other Project Team Members	Karl Dinklemann (Programmer/Analyst) Kelly Chatain (Archivist) Andrew Piskorowski (BI Analyst) Cheng Zhou (Database Analyst/Programmer) Jennie Williams (General Programmer/Analyst) Deb Seale (SSL Operations Manager) iAn Woods (Coder) Ann Munster (Coder) Nancy Walker (Coder) Peter Sparks (Programmer) Carolyn Vieira-Martinez (Survey Specialist)
Other Project Name	SCA Web
Sample Mgmt System	Web SMS
Data Col Tool	Blaise 5
Hardware	NA
DE Software	N/A
QC Recording Tool	N/A
Incentive	Not used
Administration	N/A
Payment Type	N/A
Payment Method	N/A

Report Period	Aug, 2024 (SCA Web)	Implementing
Risk Level	On Track	
Monthly Updates	The coding team completed 1,072 cases during August 2024. 96 of those cases were recoded for IRR purposes.	
Special Issues		
Cost as of Sep 19, 2024	*Total Cost to Date (direct + indirect):*	7,543.41
	Est Cost at Completion (E$AC):	56,113.41
	Total Budget:	50,730.00

	Variance (Total Budget minus- E$AC):			5,383.41
	Reason for Variance:	Projections were increased for programmers in July 2024, but actual hours during August 2024 were lower.		
Projections as of Sep 19, 2024	Dollars Projected for Month:			10,233.21
	Actual Dollars Used:			7,543.41
	Variance (Projected minus Actual):			2,690.11
	Reason for Variance:	Less hours worked than projected. Specifically, less time from Dave Dybicki due to his impending retirement.		

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:			
	Variance:			

Other Measures

Project Name	**(SCIP 2024) Sustainability Cultural Indicators Project (On Track)**
Project Mode	Primary: Web Total of Modes: 1
Project Type	Sponsored Projects
Budget	**Direct Budget**: 137,834.00 **Indirect Budget:** 0.00 **Total Budget:** 137,834.00
Principal	John Callewaert, Co-PI (SRC, College of Engineering)
Investigator/Clients	Robert Marans, Co-PI (SRC)
	Noah Webster, Co-PI (SRC)
Funding Agency	U-M
IRB	*HUM#:* HUM00260230 *Period of Approval:*
Project Team	*Project Lead:* Donnalee Ann Grey-Farquharson
	Budget Analyst: David Kellermeyer
	Production Manager:
	Senior Project Advisor: Shonda R Kruger-Ndiaye
	Production Manager 1: James Koopman
	Production Manager 2: Hongyu Johnson
Proposal #	no data
Description	SCIP 2024 is the 7th wave of the project since its inception in 2012. The SCIP (Sustainability Cultural Indicators Project) is a multi-year project designed to measure and track the culture of sustainability, originally on the U-M Ann Arbor campus. In Fall 2021, SCIP expanded to include the U-M Flint and U-M Dearborn campuses, making Fall 2021 the most recent wave of the project. For the 2024 data collection, SRO will continue to use Qualtrics software for the web survey instrument. The basic sampling and methodological design of the project will be similar to that of the 2021 wave. For all three campuses the sample will include freshmen, sophomore, juniors, seniors and graduate students, as well as faculty and staff. In addition, for the Ann Arbor campus there is the addition of a panel with the re-interview of freshmen from 2021, who are now seniors in the fall of 2024.
SRO Project Period	08/2024 - 03/2025
Data Col Period	10/2024 - 12/2024
Security Plan	NA

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

Other Project Team Members	Shonda Kruger-Ndiaye Senior Project Advisor (SPA) Donnalee Grey-Farquharson Project Co-Lead Helen Johnson Project Co-Lead James Koopman Project Manager Raphael Nishimura Sampling/Mapping Minako Edgar Reports/Mapping Laura Yoder Data Manager Lead Asia Paige Data Manager Carl Remmert Financial Analyst Senior David Kellermeyer Financial Analyst
Other Project Name	
Sample Mgmt System	Project specific system (Qualtrics)
Data Col Tool	Other (Qualtrics)
Hardware	NA
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group
Payment Type	Other (Tango cards)
Payment Method	Other (Electronic gift cards via email)

Report Period	Aug, 2024 (SCIP 2024)	Implementing
Risk Level	On Track	
Monthly Updates	The PIs' made a request to conduct a pretest to test the length of the instrument because they have added extra items since the last wave. The pretest was an adjustment in scope as was the request for a guaranteed $5 incentive in a responsive design experiment for production. With main data collection starting on October 7, 2024	

there is not a lot of time and sticking to schedule was important. The pretest was scheduled for the week of September 9th and things seem to be on track. We completed several key activities, including setting up weekly meetings with the PIs and project staff, and launching the kickoff meeting on August 6, and the AA faculty/staff and student surveys have been programmed and only require some minor tweaking. We are also looking into programming so that a random variable will be used within the survey to administer a split design methodology for AA students as well as AA faculty/staff. We aim to be able to test this with the pretest. We are also in the process of programming to extract timing information from the pretest survey. SRO is working with the PIs to find volunteers to do the pretest. The project co-leads have been working on materials for the IRB submission and coordinating the survey programming efforts.

The main data collection will happen from October 7 through December 5 on the three U-M campuses. We have four versions of the survey; one for all Dearborn participants, a second for all Flint participants, a third for AA students, and a fourth for AA faculty/staff. DMSS staff is liaising with the three registrars offices to obtain student samples and with U-M HR to obtain staff and faculty samples.

Special Issues				
Cost as of Aug 31, 2024	*Total Cost to Date (direct + indirect):*			10,944.56
	Est Cost at Completion (E$AC):			124,095.78
	Total Budget:			137,834.00
	Variance (Total Budget minus- E$AC):			13,738.22
	Reason for Variance:	We started the project this month. We continue to make projection adjustments.		
Projections as of Aug 31, 2024	*Dollars Projected for Month:*			12,647.26
	Actual Dollars Used:			10,944.56
	Variance (Projected minus Actual):			1,703.00
	Reason for Variance:	The data manager used a lot fewer projected hours for this month's work than were allocated. We are anticipating the work hours will be more accurate next month.		

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

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

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

Report Period	Aug, 2024 (SRS 2021)	Implementing
Risk Level	Some Concerns	
Monthly Updates	We are working on the revised goal of hitting 1300 new sample cases and 244 panel sample cases. We are making very good progress on the new sample cases (1226 completes as of 9/23/2024), however we are not making progress on the panel. The research team approved an additional $170,000 direct in order to stretch the new sample cases to 1300. We released 1100 new screening lines on September 11 in order to help the field team reach the higher new-sample interview goal. The budget was officially increased in September and we believe that we can extend the field period by at least one full month, if not more. The panel sample continues to be frustrating. The DAWN project management team is reviewing each panel case to see if there are any opportunities to use letters, persuasion or locating to make progress. As mentioned last month, a review of cases seems to indicate that the difficult political climate may be impacting panel cases in some areas, especially in Macomb County. The HPI and travel for panel is far higher than budgeted.	

We have engaged the PIs in a discussion of how to handle the panel sample (travel vs programming and IRB submission to allow telephone interviews). We have not completed a sufficient amount of locating in order to determine whether travel would be cost effective. The PIs have not approved any intervention however they continue to insist that we must complete all of the budgeted cases. We have several times suggested that the team submit an IRB amendment to allow telephone interviews, however this has not moved forward. This month (early September) we also made a proposed to train a small group of interviewers to conduct a shortened, telephone data collection that could be done with no or minimal programming. The PIs have not moved forward on that proposal. They have also previously declined to approve an end-game incentive or develop an end-game "plea" type letter. The PIs seem to be tending toward very complicated, costly and lengthy interventions which would require extensive programming and testing. We have told the PIs that the study will run out of time and money before complex programming can be completed. We have also made it clear that any money spent on programming reduces the money available for interviewing.

Special Issues	We continue to have serious concerns about the panel cases and we are running out of time (and money) to intervene. While we have proposed a number of interventions, the PIs have yet to approve any interventions.	
Cost as of Sep 18, 2024	*Total Cost to Date (direct + indirect):*	4,878,099.78
	Est Cost at Completion (E$AC):	6,138,787.97
	Total Budget:	5,876,610.11
	Variance (Total Budget minus- E$AC):	3,022.14
	Reason for Variance:	This is an insignificant variance in a project of this size. We do expect the project to use all available funding.
Projections as of Sep 18, 2024	*Dollars Projected for Month:*	489,835.27
	Actual Dollars Used:	482,917.58
	Variance (Projected minus Actual):	6,917.69
	Reason for Variance:	Respondent payments were a little lower than projected for this time period, reflecting a bit of a slowdown in work during the month of August.

Measures		Units at Complete	RR	HPI
	Current Goal:	1300 new/244 panel		
	Goal at Completion:	1300 new, 244 panel		
	Current Actual:	1226 new /119 panel	30% scr/51% main	
	Estimate at Complete:			
	Variance:			
Other Measures	Production is shown as of 9/23/2024.			

Project Name	(STARRS-LS Waves 3, 4, 5 (Yr1)) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study (On Track)		
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 8,809,515.00	**Indirect Budget:** 4,920,601.00	**Total Budget:** 13,730,116.00
Principal	James Wagner (University of Michigan)		
Investigator/Clients	Robert Ursano (Uniformed Services University of the Health Scienc)		
	Murray Stein / Ron Kessler (University of California San Diego / Harvard)		
Funding Agency	Department of Defense		
IRB	*HUM#:* HUM00180765		**Period of Approval:** 3/21/24 - 3/20/25
Project Team	*Project Lead:* Meredith A House		
	Budget Analyst: William Lokers		
	Production Manager: Ruth B Philippou		
	Senior Project Advisor: Lisa S Holland		
	Production Manager 1: Jeffrey Albrecht Jr		
	Production Manager 2: Lisa M Lewandowski-Romps		
Proposal #	no data		
Description	This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.

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

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

In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys). | | |
SRO Project Period	05/2020 - 02/2025		
Data Col Period	11/2022 - 04/2024		
Security Plan	Yes		

Milestones			
Pre Production Start: 04/01/2024		*Pretest Start:*	
Pretest End:		*Recruitment Start:* 08/19/2024	
Staffing Complete: 10/29/2024		*GIT Start:* 11/12/2024	
SS Train Start: 11/21/2024		*SS Train End:* 11/26/2024	
DC Start: 11/11/2024		*DC End:* 05/03/2026	

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	Aug, 2024 (STARRS-LS Waves 3, 4, 5	Implementing
	~~)	
Risk Level	On Track	
Monthly Updates	Project Management and Planning:	

Monthly Updates

Project Management and Planning:
? Slides for the September GSC meeting were sent to USUHS on August 23.
? 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.
? Budget/Funding:
o HJF sent the Year 5 subaward to U-M ORSP; review and negotiations took place throughout the month. The agreement included language about U-M not receiving Controlled Unclassified Information (CUI) from HJF, which allowed the negotiations to move forward more efficiently.
? IRB:
o The U-M approved Wave 5 IRB protocol was sent to USUHS for secondary review.
o We submitted an amendment for removing the $50 reference from the study brochure so that it is not in conflict with amounts in the incentive experiment.
? The U-M IRB approved on August 28 and the amendment was sent to USUHS for secondary review.
? We notified M&RA that, once IRB approves, we will need them to update the brochure to reflect the new language and IRB approval stamp.

Enclave and User Support:
? Annual IA security review: We identified possible dates for an October site visit from M&RA and AAG and communicated them to M&RA.
? Annual NDI Data Request: On August 16, M&RA notified the research team that the payment to the CDC for the NDI data had been established. Meredith worked with Aaron Weingrad and Dr. Ursano on steps required with the online application ahead of making the repeat request for NDI data.
? Standard Enclave activities continued. These include maintaining security requirements; processing background checks and Great Lakes Cluster (GLC) user access requests, drop box requests, ID swap and data transfer requests; managing software acquisition and updates; and providing user support as needed. Of particular note this month:
o We awaited finalization of the DUA (for COVID data sharing) with a researcher at Mass General Brigham.
o A background check and process for onboarding a new Harvard analyst to the Enclave were started.
o The team attended meetings related to the transition to new user support ticketing software.
? Biomarker group request for assistance:
o The data transfer memo for genomic and survey variables to be sent to a Yale researcher was circulated to the PIs and approved on August 20. The Enclave team worked with our IT staff to identify the best method for transferring the large data files.

Public Use Data:
? We assisted USUHS in answering a question from an ICPSR data user about how to link records across studies in the public data.
? Biosample flags, administrative variables:
o On August 15, we notified the PIs and research team that the biosample flags and administrative data had been released at ICPSR. We notified Scott/M&RA on August 22.
? Inventory document:
o The team continued work on creating crosstabs for the various blood flags with the identified demographic and disorder variables, as well as a draft of the inventory document itself.
? Lisa Lewandowski-Romps requested input from Dr. Stein on which numeric values he would like included in the inventory tables.
? After a conversation with Paul (USUHS), we decided that we will add some more general counts of each of the biosample flags to the inventory document (in addition to the crosstabs), e.g., unique soldiers with each blood flag and unique soldiers with each blood flag by study.

Wave 4 Post-Production:
? The missing survey data for 19 cases were recovered and added to the Wave 4 preliminary dataset. We resent the prelim data to Harvard, they re-ran their processes and sent those results back to U-M. Reconciliation of the Wave 4 sample was completed. The sample outcomes dataset and flowcharts were finalized and delivered on August 29.
? Other-specify and occupation/industry coding, including PII redaction of other-specify text, was completed. We worked to incorporate the coded data into the final Wave 4 survey deliverable.
? Coding of the new open-ended item at the end of the survey continued.
? The team continued work on final documentation.

Wave 5 Pre-Production:
? The team began preparations for interviewer and team leader trainings including setting timelines; making plans for hiring; reserving training facilities; and drafting materials such as manuals, presentations, training agendas, and supplemental resources.
? We coordinated with M&RA and USUHS on establishing the attendee list and start date for Wave 5 Safety Plan coordination meetings. The first meeting will be held on November 4.
? Wave 5 survey testing continued.
? Updates were made to optimize the survey login page/portal for mobile devices.
? Programming of the sample management system continued; we prepared for an initial test of the system rules.
? The team continued work on QC systems, report development, and taking steps toward Wave 5 sample prep.

Special Issues	The current areas of risk/mitigation strategies have not changed since last month.	
Cost as of Jul 31, 2024	*Total Cost to Date (direct + indirect):*	11,598,438.49
	Est Cost at Completion (E$AC):	13,598,534.31

	Total Budget:		13,730,116.00
	Variance (Total Budget minus- E$AC):		131,581.69
	Reason for Variance:	General underspending across salary groups.	
Projections as of Jul 31, 2024	Dollars Projected for Month:		231,937.81
	Actual Dollars Used:		179,329.81
	Variance (Projected minus Actual):		52,608.00
	Reason for Variance:	The underspending was across salary lines. We spent roughly 161 few hours across ~18 non-TSG staff and roughly 186 fewer hours across ~8 TSG staff. We think the fewer hours charged to STARRS is due to other project demands and vacations (although core team members' hours had been reduced for known vacation time across the summer months).	

Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures	Wave 5 data collection will begin 11/11/2024			

Developmental/Initiative Projects Dashboard

NonArchived Development Initiative and No-DataCol Projects

Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
TSME25 Blaise 5 (423562)	Initiatives	Planning	Karl A Dinkelmann	☐	☐	☐	☐	☐	☐	☐	●
TSME25 DCO Systems Support (483248)	Initiatives	Initiation	Vivienne Y Outlaw	☐	☐	☐	☐	☐	☐	●	●
TSME25 MSMS Line Generator (483227)	Initiatives	Initiation	Mark Simonson	☐	☐	☐	☐	☐	☐	●	●
TSME25 MSMS Performance (425267)	Initiatives	Implementing	Jim Rodgers	☐	☐	☐	☐	☐	☐	●	●
TSME25 ODS Data Dictionary (425198)	Initiatives	Initiation	Mark Simonson	☐	☐	☐	☐	☐	☐	☐	●
TSME25 QC Systems (483249)	Initiatives	Implementing	Sarah Elisa Broumand	☐	☐	☐	☐	☐	☐	☐	●
TSME25 REPLACE RPAY (423463)	Initiatives	Planning	Carol Lively	☐	☐	☐	☐	☐	☐	●	●
TSME25 System Maintenance - General (483910)	Initiatives	Implementing	Jeffrey L Smith	☐	☐	☐	☐	☐	●	●	●
TSME25 Team Dynamix (425197)	Initiatives	Implementing	David Bolt	☐	☐	☐	☐	☐	☐	●	●
TSME25 Translation Tool (483424)	Initiatives	Planning	Karl A Dinkelmann	☐	☐	☐	☐	☐	☐	☐	●

Project Name	**(TSME25 Blaise 5 (423562)) TSME25 Blaise 5 version and system testing (423562) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 10,000.00	**Indirect Budget:** 0.00	**Total Budget:** 10,000.00
Principal			
Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Karl A Dinkelmann		
	Budget Analyst:		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	This fiscal year 2025 initiative continues work from last fiscal year and targets some areas we aim to address in the next year. We envision using these funds to finish load testing of multiple server environments to address concurrency and develop a new standard for our server configuration. Additionally, we would like to test elements of the forthcoming Blaise 5.15 scheduled for December 2024, potentially including video interviewing components.NET8 APIs and other feature enhancements. Finally, if funds permit, some relatively newer features are introduced into some of the newer versions of Blaise that we would like to review. These include a Blaise print option and test record generation, and they begin investigating possibilities for automated testing. While the funds will not allow us to do all these tasks, we aim to stretch as much as possible from the funding. I have asked Shane Emipe to assist me in taking the lead on this initiative.		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		

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

Other Project Team Members	Shane Emipe	
Other Project Name		
Sample Mgmt System	NA	
Data Col Tool	NA	
Hardware	NA	
DE Software	N/A	
QC Recording Tool	N/A	
Incentive	Not used	
Administration	N/A	
Payment Type	N/A	
Payment Method	N/A	

Report Period	Aug, 2024 (TSME25 Blaise 5 (423562))	Planning
Risk Level	On Track	
Monthly Updates	We are finalizing our load testing to determine the optimal server setup for the new multi-server environment. We hope to have this done next month. Additionally, we have started creating our Epic Azure DevOps (AzDO). We hope to have it finalized by the end of September. We will then use AzDO throughout the remainder of the project.	
Special Issues		
Cost as of	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	10,000.00
	Variance (Total Budget minus- E$AC):	0.00
	Reason for Variance: I have not received a cost report yet.	

Projections as of	Dollars Projected for Month:			0.00
	Actual Dollars Used:			0.00
	Variance (Projected minus Actual):			0.00
	Reason for Variance:			

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

Other Measures

		Units at Complete	RR	HPI
	Current Goal:			
	Variance:			

Project Name	**(TSME25 DCO Systems Support (483248)) TSME25 DCO Systems Support (483248) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 35,000.00	**Indirect Budget:** 0.00	**Total Budget:** 40,000.00
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	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		

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

Other Project Team Members	
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	Aug, 2024 (TSME25 DCO Systems Support (483248))	Initiation
Risk Level	On Track	
Monthly Updates	x	
Special Issues		

Cost as of Sep 18, 2024	*Total Cost to Date (direct + indirect):*		7,302.39
	Est Cost at Completion (E$AC):		40,635.69
	Total Budget:		40,000.00
	Variance (Total Budget minus- E$AC):		-635.69
	Reason for Variance:	staff busy with other projects	
Projections as of Sep 18, 2024	*Dollars Projected for Month:*		3,333.33
	Actual Dollars Used:		1,774.00
	Variance (Projected minus Actual):		1,559.33
	Reason for Variance:	staff busy with other projects	

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

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

Project Name	**(TSME25 MSMS Line Generator (483227)) TSME25 MSMS Line Generator (483227) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 10,000.00	**Indirect Budget:** 0.00	**Total Budget:** 10,500.00
Principal Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Mark Simonson		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Carol Lively		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	TSME25 MSMS Line Generator		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		
Milestones	*Pre Production Start:*		*Pretest Start:*
	Pretest End:		*Recruitment Start:*
	Staffing Complete:		*GIT Start:*
	SS Train Start:		*SS Train End:*
	DC Start:		*DC End:*
Other Project Team Members	TBD		
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	Aug, 2024 (TSME25 MSMS Line Generator (483227))	Initiation
Risk Level	On Track	
Monthly Updates	Not started	
Special Issues		
Cost as of	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	10,500.00
	Variance (Total Budget minus- E$AC):	0.00
	Reason for Variance:	
Projections as of	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	0.00
	Variance (Projected minus Actual):	0.00
	Reason for Variance:	

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

Other Measures

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

Other Measures

Project Name	**(TSME25 MSMS Performance (425267)) TSME25 Mixed-mode systems dev support - Reliability & Performance (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: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	Mixed-mode systems dev support - Reliability & Performance		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		

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

Other Project Team Members		
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	Aug, 2024 (TSME25 MSMS Performance (425267))	Implementing
Risk Level	On Track	
Monthly Updates	Work is proceeding	
Special Issues		
Cost as of Sep 18, 2024	*Total Cost to Date (direct + indirect):*	14,268.93
	Est Cost at Completion (E$AC):	180,584.00
	Total Budget:	100,000.00
	Variance (Total Budget minus- E$AC):	-80,584.00
	Reason for Variance: Update	
Projections as of Sep 18, 2024	*Dollars Projected for Month:*	8,333.33
	Actual Dollars Used:	8,561.45
	Variance (Projected minus Actual):	-228.12
	Reason for Variance: Update	

Measures

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

Other Measures

Measures

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

Other Measures

Project Name	**(TSME25 ODS Data Dictionary (425198)) TSME25 ODS Data Dictionary (425198) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 4,500.00	**Indirect Budget:** 0.00	**Total Budget:** 4,500.00
Principal Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Mark Simonson		
	Budget Analyst:		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	Request by Grant, TBD		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		
Milestones	*Pre Production Start:*		*Pretest Start:*
	Pretest End:		*Recruitment Start:*
	Staffing Complete:		*GIT Start:*
	SS Train Start:		*SS Train End:*
	DC Start:		*DC End:*
Other Project Team Members	TBD		
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	Aug, 2024 (TSME25 ODS Data Dictionary (425198))	Initiation
Risk Level	On Track	
Monthly Updates	Sarah B. will meet with Grant B. (probably in Oct 2024) to understand the requirements of this project.	
Special Issues		
Cost as of	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	4,500.00
	Variance (Total Budget minus- E$AC):	0.00
	Reason for Variance:	
Projections as of	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	0.00
	Variance (Projected minus Actual):	0.00
	Reason for Variance:	

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

Other Measures

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

Other Measures

Project Name	**(TSME25 QC Systems (483249)) TSME25 QC Systems (483249) (On Track)**		
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:* Sarah Elisa Broumand		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1:		
	Production Manager 2: Shonda R Kruger-Ndiaye		
Proposal #	no data		
Description	to be entered		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		

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

Other Project Team Members	Shaowei Sun, Brianna Sabol, Andrew Piskowoski, Cheng Zhou, Hueichun Peng, LihShwu Key
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	Aug, 2024 (TSME25 QC Systems	Implementing
Risk Level	On Track	
Monthly Updates	This project has been focused on reports and finishing up updating the IIR module for trainees to match what they see in real production evaluations.	
Special Issues		
Cost as of Sep 18, 2024	*Total Cost to Date (direct + indirect):*	4,917.34
	Est Cost at Completion (E$AC):	34,938.56
	Total Budget:	35,000.00
	Variance (Total Budget minus- E$AC):	61.44
	Reason for Variance: minimal variance	
Projections as of Sep 18, 2024	*Dollars Projected for Month:*	2,916.66
	Actual Dollars Used:	1,743.47
	Variance (Projected minus Actual):	1,173.19
	Reason for Variance: This CRS report is incorrect. Will be updated.	

Measures

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

Other Measures

Measures

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

Other Measures

Project Name	**(TSME25 REPLACE RPAY (423463)) TSME25 REPLACE RPAY (423463) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 42,000.00	**Indirect Budget:** 0.00	**Total Budget:** 42,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Carol Lively		
	Budget Analyst:		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	to be entered		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		
Milestones	*Pre Production Start:*		*Pretest Start:*
	Pretest End:		*Recruitment Start:*
	Staffing Complete:		*GIT Start:*
	SS Train Start:		*SS Train End:*
	DC Start:		*DC End:*
Other Project Team Members			
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	Aug, 2024 (TSME25 REPLACE RPAY (423463))	Planning
Risk Level	On Track	
Monthly Updates	On hold for further planning	
Special Issues		
Cost as of	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	42,000.00
	Variance (Total Budget minus- E$AC):	0.00
	Reason for Variance: na	
Projections as of	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	0.00
	Variance (Projected minus Actual):	0.00
	Reason for Variance: na	

Measures

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

Other Measures

Measures

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

Other Measures

Project Name	**(TSME25 System Maintenance - General (483910)) TSME25 System Maintenance - General (483910) (On Track)**		
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:* Jeffrey L Smith		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	Support for TSG systems		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		

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

Other Project Team Members	
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	Aug, 2024 (TSME25 System Maintenance	Implementing
	~~General (483910))~~	
Risk Level	On Track	
Monthly Updates	**August Management Summary**	

August Activities Summary: 483910-SRO Sys Maint

1. **IW Data Merge and MAI**
2. **Add PowerBuilder code to Git**
3. **ST Employee Data Merge & SQLA17**
4. **IW Data Merge - MAI obs merge bug fix**
5. **SRO ID Meeting**
6.**PB Team meetings**

Special Issues		
Cost as of Sep 18, 2024	*Total Cost to Date (direct + indirect):*	5,772.98
	Est Cost at Completion (E$AC):	34,939.58
	Total Budget:	35,000.00
	Variance (Total Budget minus- E$AC):	60.42

	Reason for Variance:	see below		
Projections as of Sep 18, 2024	*Dollars Projected for Month:*			2,916.66
	Actual Dollars Used:			2,211.99
	Variance (Projected minus Actual):			704.67
	Reason for Variance:	see below		

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

Other Measures

		Units at Complete	**RR**	**HPI**

Project Name	**(TSME25 Team Dynamix (425197)) TSME25 Team Dynamix (425197) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 21,000.00	**Indirect Budget:** 0.00	**Total Budget:** 21,000.00
Principal			
Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* David Bolt		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Carol Lively		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	Team Dynamix implementation: 1) Library of API endpoints to integrate with Team Dynamics. 2). Batch process to call out to Team Dynamix API.		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		

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

Other Project Team Members	
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	Aug, 2024 (TSME25 Team Dynamix (425197))	Implementing
Risk Level	On Track	
Monthly Updates	1. Completed core technical training from ITS on TDx. Further details and training needed for the rest of the team. 2. Added more Dev's and TS staff to TDx 3. Created TDx groups 4. Hueichun created tables in FRED to support SRO ID looks ups from TDx	

Special Issues			
Cost as of Sep 18, 2024	*Total Cost to Date (direct + indirect):*		0.00
	Est Cost at Completion (E$AC):		17,500.00
	Total Budget:		21,000.00
	Variance (Total Budget minus- E$AC):		3,500.00
	Reason for Variance:	No charges yet	
Projections as of Sep 18, 2024	*Dollars Projected for Month:*		1,750.00
	Actual Dollars Used:		0.00

| | | Variance (Projected minus Actual): | | 1,750.00 |

	Reason for Variance:	See below	

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

Other Measures

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

Other Measures

Project Name	**(TSME25 Translation Tool (483424)) TSME25 Translation Tool (483424) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 10,500.00	**Indirect Budget:** 0.00	**Total Budget:** 10,500.00
Principal			
Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Karl A Dinkelmann		
	Budget Analyst:		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	This fiscal year 2025 initiative aims to automate translation adaptation to a Blaise instrument. Currently, we cut and paste the majority of foreign translation text into Blaise instruments; however, having a way to automate some or most of this would make the process much quicker and less error-prone. If we get the HRS-Kenya and the New Your City Housing projects, we must find a better way. While our goal is to automate as much as possible, we aim to reduce the cutting and pasting necessary to create multi-lingual instruments. We have just begun discussing our options. Early thoughts were to export the text that needs to be translated from Blaise into a structured format (potentially XML) or use the Blaise BITT file. The BITT file is a file Blaise can export and contains most of the translatable text in a data model. The Issue with the BITT file is that it is a one-way process, meaning it can export and allow one to translate the text, but then Blaise uses the BITT file as the source or the datamodel text. This would be a two-way process of exporting and importing the text in the ideal world. Therefore, in this idea, we would complete the circle by importing the BITT file into the Blaise code. I have asked Kelly Lieske to assist me in taking the lead on this initiative.		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		

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

Other Project Team Members	Kelly Lieske
Other Project Name	
Sample Mgmt System	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	Not used
Administration	NA
Payment Type	N/A
Payment Method	N/A

Report Period	Aug, 2024 (TSME25 Translation Tool	Planning
	(483424))	
Risk Level	On Track	
Monthly Updates	We have begun brainstorming to determine the best approach to maximizing our budgetary constraints. Additionally, we have started creating our Epic Azure DevOps (AzDO). We hope to have it finalized by the end of September. We will then use AzDO throughout the remainder of the project.	
Special Issues		
Cost as of	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	10,500.00

	Variance (Total Budget minus- E$AC):			0.00
	Reason for Variance:	I have not received a cost report yet.		
Projections as of	Dollars Projected for Month:			0.00
	Actual Dollars Used:			0.00
	Variance (Projected minus Actual):			0.00
	Reason for Variance:			

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

Other Measures