Survey Research Operations

Monthly Project Report

Sponsored Data Collection Projects and Development Initiative

July 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 & Help Study) Caregiving, Complex Family and Kinship Ties, and Alzheimer's Disease and Related Dementias (ADRD)
(CARE Military) Concussion Assessment, Research and Education (CARE) Consortium 2022 - Military
(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022
(CCS) Community College Survey
(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
(LHMS 2023 Fall) Life History Mail Study Fall 2023
(LHMS 2023 Spring) Life History Mail Study Spring 2023
(MI CReSS (Year 3 & 4)) Michigan COVID-19 Recovery Surveillance Cohort Study
(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027
(MTF Early Panel Pilot) Monitoring the Future: A Cohort-Sequential Panel Study of Drug Use, Ages 19-65 - Administrative Supplement #1 (8/10th Grade Panel)
(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027
(NDWS) National Dementia Workforce Study
(PR-PSID) Puerto Rico Panel Study of Income Dynamics
(PSID 2025 OCU) PSID 2025 Online Contact Update
(PSID CDS 2023) PSID Childhood Development Supplement 2023
(PSID TAS 2023) Transition to Adulthood within its Life Course & Intergenerational Family Context
(PSID23) Panel Study of Income Dynamics Core 2023
(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
(TSME24 DCO System Support (483248)) TSME24 DCO System Support (483248)
(TSME24 MSMS performance work (425267)) TSME24 MSMS performance work (425267)
(TSME25 DCO System Support (483248)) TSME25 DCO System Support (483248)
(TSME25 MSMS Line Generator (483227)) TSME25 MSMS Line Generator (483227)
(TSME25 MSMS Performance (425267)) TSME25 MSMS Performance (425267)
(TSME25 System Maintenance - General (483910)) TSME25 System Maintenance - General (483910)
(TSME25 Team Dynamix (425197)) TSME25 Team Dynamix (425197)

Sponsored Projects Dashboard

NonArchived Sponsored Projects

Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr	May	Jun	Jul
ANES 2024	Sponsored	Implementing	Andrew L Hupp	🟡	🟡	🟡	🟡	🟡	🟡	🟡
BFY	Sponsored	Implementing	Piotr Dworak	🟢	🟢	🟢	🟢	🟢	🟢	🟢
BHM Library Project	Sponsored	Implementing	Karin Schneider	🟡	🟡	🟢	🟢	🟢	🟢	🟢
Care & Help Study	Sponsored	Closing	Margaret Lee Hudson	🟢	🟢	🟢	🟢	🟢	🟢	🟢
CARE Military	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢	🟢	🟢	🟢
CARE SALTOS MTEC	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟡	🟢	🟢	🟢	🟢
CCS	Sponsored	Planning	Jeffrey Albrecht Jr	🟡	🟢	🟢	🟢	🟢	🟡	🟢
CVFS-SCAN	Sponsored	Initiation	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	Implementing	Sarah Elisa Broumand	🟢	🟢	🟢	🟢	🟢	🟢	☐
LHMS 2023 Fall	Sponsored	Implementing	Gary Hein	🟢	🟢	🟢	🟢	🟢	🟢	🟢
LHMS 2023 Spring	Sponsored	Implementing	Gary Hein	🟢	🟢	🟢	🟢	🟢	🟢	🟢
MI CReSS (Year 3 & 4)	Sponsored	Implementing	Timothy Prand	🟡	🟢	🟢	🟢	🟢	🟢	🟢
MTF Base Year 2022_27	Sponsored	Implementing	Rebecca Gatward	🟢	🟢	🟢	🟢	🟢	🟢	🟢
MTF Early Panel Pilot	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢	🟢	🟢	🟢
MTF Panel 2022-27	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢	🟢	🟢	🟢
NDWS	Sponsored	Planning	Margaret Lee Hudson	☐	🟢	🟢	🟢	🟢	🟢	🟢
PR-PSID	Sponsored	Implementing	Camila Kendall	🟡	🟡	🟡	🟡	🟡	🟡	🟡
PSID 2025 OCU	Sponsored	Implementing	Camila Kendall	☐	☐	☐	🟢	🟢	🟡	🟢
PSID CDS 2023	Sponsored	Implementing	Piotr Dworak	🟢	🟢	🟢	🟢	🟡	🟢	🟢
PSID TAS 2023	Sponsored	Closing	Elizabeth Ohryn	🟢	🟢	🟢	🟢	🟢	🟢	🟢
PSID23	Sponsored	Implementing	Rachel Anne Orlowski	🟢	🟡	🟢	🟢	🟢	🟢	🟢
PSID25	Sponsored	Implementing	Rachel Anne Orlowski	☐	☐	☐	☐	🟢	🟢	🟢
SAND COVID Follow-Up	Sponsored	Planning	Elizabeth Ohryn	☐	☐	☐	☐	🟢	🟢	🟢
SCA 2024	Sponsored	Initiation	William Keating	🟢	🟢	🟢	🟢	🟢	🟢	🟢
SCA Web	Sponsored	Implementing	William Keating	☐	☐	☐	☐	☐	☐	🟢
SCIP 2024	Sponsored	Initiation	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 (Some Concerns)**
Project Mode	Primary: Web Secondary: Face to Face Total of Modes: 3
Project Type	Sponsored Projects
Budget	**Direct Budget**: 4,267,472.00 **Indirect Budget:** 2,283,848.00 **Total Budget:** 6,551,320.00
Principal Investigator/Clients	Nicholas A. Valentino (University of Michigan)
	Shanto Iyengar (Stanford University)
	D. Sunshine Hillygus (Duke University)
Funding Agency	National Science Foundation (NSF)
IRB	*HUM#:* HUM00226016 *Period of Approval:* Study is exempt
Project Team	*Project Lead:* Andrew L Hupp
	Budget Analyst: William Lokers
	Production Manager: Theresa Camelo
	Senior Project Advisor: Grant D Benson
	Production Manager 1: Margaret Lavanger
	Production Manager 2: Lisa Van Havermaet
Proposal #	no data
Description	The mission of the American National Election Studies (ANES) is to inform explanations of election outcomes by providing data that support rich hypothesis testing, maximize methodological excellence, measure many variables, and promote comparisons across people, contexts, and time. The ANES serves this mission by providing researchers with a view of the political world through the eyes of ordinary citizens.

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

Milestones			
Pre Production Start: 03/01/2024		*Pretest 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	July, 2024 (ANES 2024)	Implementing
Risk Level	Some Concerns	

Monthly Updates	MSG mailed the in-person and fresh web advance letters: 2024-07-29, and the panel advance letters on 2024-07-30. Panel advance emails were sent on 2024-08-02. Data collection in the field started on 2024-08-02 where possible. The interviewer bulk supplies and spouse/partner survey packets were delayed for many interviewers which kept them from working and traveling until 2024-08-05. Web data collection "began" on 2024-08-08. We notified MSG that they could mail the fresh web invitations, and panel cases with email addresses were emailed invites 2024-08-08. We notified NORC on 2024-08-13 that they could invite (via mail or email) the GSS sample.
	There has been limited technical issues reported from participants. Given the completes we have, we do not believe there are any systemic issues, just more isolated issues.
	DMSS is working through some report revisions and updates requested by the project staff.
	A meeting was held with the PIs on 2024-08-19 to discuss the progress in the field to-date. Andrew and Grant are following-up with an estimate for additional funds. The PIs have a meeting with NSF on 2024-08-20 and may see if additional funds are available. We have a posting up for on-staffers and have a training planned for September to try an increase the staffing with the recent attrition we've experienced. Unfortunately, given the timeline there isn't time to recruit and on-board new hires before the end of the pre-election study. We have implemented and incentive in the field and have travel planned to unstaffed areas to try and have attempts on all sample by the end of August.

Special Issues

Cost as of Aug 15, 2024	*Total Cost to Date (direct + indirect):*	1,232,712.31
	Est Cost at Completion (E$AC):	6,670,794.50
	Total Budget:	6,551,320.00
	Variance (Total Budget minus- E$AC):	-119,474.50
	Reason for Variance:	We adjusted the projections with the levels of the interviewers currently on staff.
Projections as of Aug 15, 2024	*Dollars Projected for Month:*	822,163.08
	Actual Dollars Used:	690,882.76
	Variance (Projected minus Actual):	131,280.32
	Reason for Variance:	Unused projections were pushed forward.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	6,636	55%	10.0
	Goal at Completion:			
	Current Actual:	2,155	15.3%	15.75
	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.

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	July, 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 348 participants over to the lab representing 67% of eligible respondents.

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 9-9, 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 Aug 17, 2024	Total Cost to Date (direct + indirect):		7,760,152.07
	Est Cost at Completion (E$AC):		8,743,964.75
	Total Budget:		8,700,361.73
	Variance (Total Budget minus- E$AC):		-43,603.02
	Reason for Variance:	Last month (June) overrun was @ $9K. This month (July) overrun increased to $43K as a result of iwer merit increases and salary adjustments. The scale of increase is concerning but we have some time to consider options (project is funded through July 2027).	
Projections as of Aug 17, 2024	Dollars Projected for Month:		22,685.94
	Actual Dollars Used:		24,879.92
	Variance (Projected minus Actual):		-2,193.98
	Reason for Variance:	June overrun is attributable to higher iwer hours.	

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

Other Measures

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

Milestones

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	July, 2024 (BHM Library Project)	Implementing
Risk Level	On Track	
Monthly Updates	Planning to finalize National Survey questionnaire and launch late in August.	
Special Issues	NONE. PI has funded the library lookups for the national survey.	
Cost as of Aug 12, 2024	*Total Cost to Date (direct + indirect):*	114,731.28
	Est Cost at Completion (E$AC):	200,741.57
	Total Budget:	197,671.00
	Variance (Total Budget minus- E$AC):	-3,070.57

	Reason for Variance:	Once we stop projecting the programmer hours, I think the overrun will be reduced.
Projections as of Aug 12, 2024	**Dollars Projected for Month:**	8,227.84
	Actual Dollars Used:	7,709.52
	Variance (Projected minus Actual):	518.32
	Reason for Variance:	NA

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

Other Measures

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

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

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

Report Period	July, 2024 (Care & Help Study)	Closing
Risk Level	On Track	
Monthly Updates	In July the second and final round of cognitive interviews were conducted. The PI spent a couple of weeks reviewing round 1 interviews and updating her questions and the cognitive interview script with feedback from SRO (Hudson) and the PI's ISR mentors. After the interview guide was updated, nine additional n-person cognitive IWs were completed between July 17-29. Recruitment and scheduling was handled by the PI and her research assistant. Margaret set up meeting space and recording and conducted all interviews in the Perry building. After interviews were complete, Margaret provided a summary of the interviews and all interview materials (audio	

recording, transcript, interview notes, written materials completed by the respondent, signed consent form) to the PI. Paper receipts were kept for the ISR business office. This completes the project period and meets the deliverables requested.

Special Issues				
Cost as of Aug 17, 2024	*Total Cost to Date (direct + indirect):*			15,490.68
	Est Cost at Completion (E$AC):			15,490.68
	Total Budget:			42,636.00
	Variance (Total Budget minus- E$AC):			27,145.32
	Reason for Variance:			
Projections as of Aug 17, 2024	*Dollars Projected for Month:*			5,838.58
	Actual Dollars Used:			2,693.73
	Variance (Projected minus Actual):			3,144.85
	Reason for Variance:			
Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(CARE Military) Concussion Assessment, Research and Education (CARE) Consortium 2022 - Military (On Track)		
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 1,338,017.70	**Indirect Budget:** 347,885.00	**Total Budget:** 1,685,902.70
Principal	Dr. Steven Broglio (U of M Kinesiology)		
Investigator/Clients	Dr. Micheal McCrea /Dr. Pasquina (Medical College of Wisconsin/Uniformed Services Un)		
	Dr. Thomas McAllister (Indiana University School of Medicine)		
Funding Agency	NCAA and DoD		
IRB	*HUM#:* 00202691		***Period of Approval:*** 7/23/2021 - open
Project Team	*Project Lead:* Donnalee Ann Grey-Farquharson		
	Budget Analyst: David Kellermeyer		
	Production Manager: Barbara Aghababian-Homburg		
	Senior Project Advisor: Barbara Lohr Ward		
	Production Manager 1: Hongyu Johnson		
	Production Manager 2: Keith Liebetreu		
Proposal #	no data		
Description	The project follows academy cadets post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure.		
	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	July, 2024 (CARE Military)	Implementing
Risk Level	On Track	

| **Monthly Updates** | 1. Project Management:
• SRO is in continuous discussion with the PI about future funding phases (2026).
• SRO continues to work with Tango Cards company to find more options to compensate respondents who are residing
    internationally.
• SRO prepared the PI monthly report for July.

2. DMSS:
• SRO requested a locating data delivery adjustment from QG to meet SRO needs.

3. CARE SMS system:
• The SRO continues to address CP issues with QG.
• The SRO continues to work with Datalys and QG on handling the samples that were transferred from Tier 2 back to Tier 1.

4. Questionnaire Development
- n/a

5. Production
 - The field team is running a fun challenge to boost productivity.
 - The Goal for the Military project is 5000 completes by the end of April 2025. On July 31, 2024, the total completed military
   cases was 3959. In the DCP3 (II), the Military Production stats: Total Released samples = 9650
     Total Completed Iws = 626
         Web = 621
         CATI = 5
- Locating Team: continued to use social media platforms to find potential respondents. As of 07/31/2024,
   - Respondents (Civilian and Military) ever in Tracking =1486
   - Respondents (Military) ever in tracking found Alive = 290
   - Respondents (Military) Found Alive Completed = 30

6. Hiring and Training
- n/a |

Special Issues

Cost as of Jul 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 May 2024, we allocated $54,805.79 to the Military project with the Civilian funds. This brings our cumulative spending on the project to $69,553.59 from April to May 2024. The current spending is reflected the underrun amount in Civilian funds.
Projections as of Jul 31, 2024	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	52,516.66
	Variance (Projected minus Actual):	-52,516.66
	Reason for Variance:	We didn't have projection under Military funds since April 2024. **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	Dr. Steven Broglio (U of M Kinesiology)		
Investigator/Clients	Dr. Michael McCrea (Medical College of Wisconsin)		
	Dr. Thomas McAllister (Indiana University School of Medicine)		
Funding Agency			
IRB	*HUM#:* 00202691		*Period of Approval:* 7/23/2021 - open
Project Team	*Project Lead:* Donnalee Ann Grey-Farquharson		
	Budget Analyst: David Kellermeyer		
	Production Manager: Barbara Aghababian-Homburg		
	Senior Project Advisor: Barbara Lohr Ward		
	Production Manager 1: Hongyu Johnson		
	Production Manager 2: Keith Liebetreu		
Proposal #	no data		
Description	SRO will provide consultation, respondent locating activities and data collection for respondents in the longitudinal Concussion Assessment, Research and Education (CARE) study, with the goal of securing participation from 7,500 unique past-CARE study participants. Participants will complete the same set of study assessments at two time points over the five-year project period. The project follows collegiate athletes post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure. Specifically, SRO decentralized field interviewers will locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web. This budget assumes an overall SRO involvement period of approximately 44 months over two waves. Wave 1 SRO involvement will begin in December 2021 with data collection taking place over approximately 12 months, beginning approximately May 2022. Wave 2 SRO involvement will begin in November 2023 with data collection taking place over approximately 12 months starting in May 2024. Currently, the total cost for the overall scope of work (based on the currently committed funding from all sources) is estimated at $4,685,914. This includes $3,718,978 direct and $966,936 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders). As additional sources of funding are identified and those resources committed to SRO survey data collection activities, or inversely if a funder withdraws or reduces their level of funding to the project, the scope of work (e.g., the number of interviews to be collected) will increase or decrease respectively. The estimate of funding contributed by the Department of Defense through the MTEC RFP is $2,277,689. This includes $1,807,689 direct costs and $470,000 indirect costs budgeted at the 26% indirect cost rate. The proposed period of support is September 1, 2021 through August 31, 2025.		
SRO Project Period	10/2021 - 08/2026		
Data Col Period	03/2022 - 02/2026		
Security Plan	NA		

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

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

Incentive	Yes, R
Administration	UM Group (Kinesiology)
Payment Type	Check, post ($150.00)
Payment Method	Check through other system (UM)

Report Period	July, 2024 (CARE SALTOS MTEC)	Implementing
Risk Level	On Track	

Monthly Updates	1. Project Management:
	• SRO is in continuous discussion with the PI about future funding phases (2026).
	• SRO continues to work with Tango Cards company to find more options to compensate respondents who are residing
	     internationally.
	• SRO prepared the PI monthly report for July.
	
	2. DMSS:
	• SRO requested a locating data delivery adjustment from QG to meet SRO needs.
	
	3. CARE SMS system:
	• The SRO continues to address CP issues with QG.
	• The SRO continues to work with Datalys and QG on handling the samples that were transferred from Tier 2 back to Tier 1.
	
	4. Questionnaire Development
	- n/a
	
	5. Production
	 - The field team is running a fun challenge to boost productivity.
	 - The Goal for the Civilian project is 7500 completes by the end of April 2025. On July 31, 2024, the total completed civilian cases
	     was 5431.
	   In the DCP3 (II) period, the Civilian Production stats: Total Released samples = 19767
	       Total Completed Iws = 2125
	                    Web = 2099
	                    CATI = 26
	- Locating Team: continued to use social media platforms to find potential respondents. As of 07/31/2024,
	    - Respondents (Civilian and Military) ever in Tracking =1486
	    - Respondents (Civilian) ever in tracking found Alive = 975
	    - Respondents (Civilian) Found Alive Completed = 152
	
	6. Hiring and Training
	- n/a	

Special Issues		
Cost as of Jul 31, 2024	*Total Cost to Date (direct + indirect):*	2,767,715.99
	Est Cost at Completion (E$AC):	4,663,829.26
	Total Budget:	4,685,914.00
	Variance (Total Budget minus- E$AC):	22,084.74
	Reason for Variance:	The Telephone Admin Fees were not posted in July but will be accounted for in August. Additionally, some staff work hours have been allocated to another project. These factors have contributed to the current underrun amount. We will make adjustments for the August projection accordingly. As a note, the field interviewer rate has been increased and is now in effect. This rate change has been taken into account in current projections. The adjustment will impact the underrun amount and will be made from next month onward. **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.
Projections as of Jul 31, 2024	*Dollars Projected for Month:*	148,699.66
	Actual Dollars Used:	133,273.26
	Variance (Projected minus Actual):	15,426.40
	Reason for Variance:	We are currently underrun on this project. The interviewer projections have been very accurate and close to actuals in July. However, the rate has been increased and is now in effect, and this rate change has been taken into account in current projections. Additionally, some staff work hours have been allocated to another project. These factors have contributed to the current underrun amount. We will make

adjustments for next month onward.

**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	**(CCS) Community College Survey (On Track)**
Project Mode	Primary: Web Total of Modes: 1
Project Type	Sponsored Projects
Budget	**Direct Budget**: 560,774.00 **Indirect Budget:** 84,115.00 **Total Budget:** 644,889.00
Principal	Hana Lahr (Teachers College, Columbia University)
Investigator/Clients	Veronica Minaya (Teachers College, Columbia University)
	Rachel Baker (University of Pennsylvania)
Funding Agency	Ascendium Education Group
IRB	*HUM#:* 00237400 ***Period of Approval:***
Project Team	*Project Lead:* Jeffrey Albrecht Jr
	Budget Analyst: 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:* 08/01/2024	
	Staffing Complete:	*GIT Start:*	
	SS Train Start:	*SS Train End:*	
	DC Start: 10/16/2024	*DC End:* 12/03/2024	

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	July, 2024 (CCS)	Planning
Risk Level	On Track	
Monthly Updates	Budget -A challenge in nailing down the budget was that the PIs had several sample scenarios, including different combinations of participants based on projected college retention rates. While the PIs really wanted to set up a special effort to collect data from those who were not enrolled, that was beyond the scope of the original study. After finding out how much extra it would cost to add a Leavers survey, the PIs opted to scale back that effort. Also, the PIs really wanted an itemized breakdown of costs that are not typical in the ballpark phase of the proposal process and repeatedly requested more refined breakdowns. If ever possible, it could be helpful to create one or more pared down versions of the proposals worksheet that could be used to get ballpark ranges for specific tasks,	

like reminder calling, mailings, etc.

Project Support
-For the re-budget, significant effort was shifted from data management to respondent payments. There are fewer needs for data management, because we are mostly replicating what we did in Wave 2, e.g., we are making few changes to the preload and can reuse a good number of testing lines. Also, it is straightforward to download the final data the Qualtrics user interface, and the PIs do not require weighting or a concatenated dataset.
-Jeffrey and Steven finalized the survey spec, and Marsha is well along with programming.
-Steven sent the new survey items to SpanTran to translate.

IRB
-The continuing review was approved by CCRC IRB and acknowledged by U-M IRB.
-The PIs have submitted the Wave 3 proposal to the CCRC IRB.

Production Experiments
In Wave 3, we will conduct experiments to compare the effects of three study invitation modes (i.e., invitation cards, emails, and text messages) and of reminder calling on production outcomes. Note: the decision to add back reminder calling was based on the observed effectiveness in Wave 2. Thus, the Wave 2 experiment paid off. In Wave 3, we will replicate the experiment in order to (a) maintain an affordable sample size and (b) to replicate the first experiment.

Special Issues	Other than waiting for Ascendium's re-budget approval, pre-production is on track.	
Cost as of Aug 21, 2024	***Total Cost to Date (direct + indirect):***	586,349.71
	Est Cost at Completion (E$AC):	781,026.37
	Total Budget:	644,889.00
	Variance (Total Budget minus- E$AC):	-136,137.37
	Reason for Variance:	Projections for Wave 3 have been updated based on the re-budget. CCRC is now processing the formal budget after several weeks of negotiation between Jeffrey and the PIs, including at least seven ballpark budgets created by the proposals team (first ballpark sent on 6/14/24). By the end of negotiations, the PIs decided to increase the overall budget by 20% (~160k), primarily to add $5 prepayments with thank you cards, reminder calling, and extra project manager time for final reporting. The formal proposal for $219,233 has been approved by SRC, ORSP, and CCRC and has been sent to the funder, Ascendium. The PIs expect their approval very soon. Projections through the end of the project are now $194,676.66, so based on the current plan, we anticipate around a $25,000 underrun, which will give us flexibility for unanticipated issues that might arise throughout production, extra respondent payments (maybe we won't need to cap production at 1,100 completions), and/or project management time for reporting.
Projections as of Aug 21, 2024	***Dollars Projected for Month:***	7,745.84
	Actual Dollars Used:	5,790.07
	Variance (Projected minus Actual):	1,955.77
	Reason for Variance:	Effort was lower than expected for project support and programming, as the proposal process took longer than anticipated. Also, there was a respondent payment credit of ~$1k added back in July.

Measures		Units at Complete	RR	HPI
	Current Goal:	1100	40%	
	Goal at Completion:	1100	40%	
	Current Actual:	0	0	
	Estimate at Complete:	1100	40%	
	Variance:	0	0	
Other Measures	The PIs need around 1,000 enrolled students to complete, so we will monitor total counts of those students.			

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:*	*Pretest Start:*
	Pretest End:	*Recruitment Start:*
	Staffing Complete:	*GIT Start:*
	SS Train Start:	*SS Train End:*
	DC Start:	*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	July, 2024 (CVFS-SCAN)	Initiation
Risk Level	On Track	
Monthly Updates	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 is ordering interviewer laptops. They will order 2 additional laptops for SRO use for testing. They	

will be ordered from Lenovo in Nepal and shipped directly to SRO. ISER-N interviewers will have work-issued cell phones. Survey 1-2-3 will be added to cell phones for taking pictures of a few of the assessments that require the R to create shapes with beans and matchsticks. The photos will be sent via Survey 1-2-3 back to the office and linked to the Respondent.

Questionnaire: All cognitive assessment tests requiring licenses have been approved. ISER-N is currently writing Blaise specifications for a Respondent demographics interview, the cognitive assessments and the Informant interview. The PIs are proposing a Proxy interview that includes R demographics information. They would like the Informant to attempt to do the demographics interview as well, so the Proxy would not be in lieu of the R interview. The PIs are discussing the objectives of the study so that we can provide the services needed within the desired timeline, scope, and budget. The ISER-N team is aiming to have all specs finished by the end of this month (August '24). Programming has begun on specs that have been provided. The ISER-N team is currently slightly behind schedule, i.e. one week behind, on providing specs to SRO. The specs received thus far are written sufficiently for SRO programmers to move forward.

Timeline: There is some concern with project timeline as it is already tight and specs are currently one week behind schedule. If the remainder of specs are delivered on time and programming and testing go well, the technical development dates seem reasonable.

Training: We are only in early talks about training. The project lead will meet with the ISER-N Project Mgr so that we can discuss expectations, define roles, and make a training plan. The PI has proposed training dates for the 3rd and 4th week of January. We will narrow these dates down and propose moving the training sooner as discussed, due to competing project demands.

Other: The PI team is proposing a Pretest and focus group in September/October. They would conduct this via paper/pencil. Again, we are attempting to manage scope and timeline, and reminding them that we are already programming to Blaise specs and not expecting any changes as a result of Pretest of a focus group.

Special Issues

Cost as of Aug 17, 2024	Total Cost to Date (direct + indirect):		29,808.85
	Est Cost at Completion (E$AC):		284,885.17
	Total Budget:		571,548.00
	Variance (Total Budget minus- E$AC):		286,662.83
	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 Aug 17, 2024	Dollars Projected for Month:		27,317.63
	Actual Dollars Used:		12,257.25
	Variance (Projected minus Actual):		15,060.38
	Reason for Variance:	Hours projections were added as placeholders and were over-projected for June. Hours have been spread across months.	

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 Antonucchi (Life Course Development Program, SRC)		
	Laura Zahodne (Life Course Development Program, SRC)		
Funding Agency			
IRB	*HUM#:* HUM00146040		*Period of Approval:* 4/9/2020
Project Team	*Project Lead:* Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Taghreid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 600 interviews with recently identified Arab Americans aged 65 or older residing in Southeast Michigan and 330 interviews with Social Relations sample members aged 65 or older. The Arab American sample will be selected based on an in-person household screening. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements. Social Relations respondents will only complete the cognitive interview. An informant interview will also be conducted for all sample members. Interviews will be conducted in English or Arabic.		
SRO Project Period	05/2019 - 03/2023		
Data Col Period	05/2023 - 03/2024		
Security Plan	No		

Milestones	*Pre Production Start:* 12/01/2022	*Pretest Start:*
	Pretest End:	*Recruitment Start:* 02/01/2023
	Staffing Complete: 04/10/2023	*GIT Start:* 05/16/2023
	SS Train Start: 05/18/2023	*SS Train End:* 05/25/2023
	DC Start: 05/30/2023	*DC End:* 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	July, 2024 (Health and Well Being in SE MI)	Implementing
Risk Level	Some Concerns	
Monthly Updates	As a reminder, the new study goals that the PIs agreed to are 200 new sample, 400 convenience sample and 200 panel sample cases. This continues to be our goal, however we will stretch this as budget allows. We are carefully evaluating month-by-month costs and will extend the project if we can. The convenience sample is coming in a little under the original HPI projections, however the panel sample is coming in much higher than the HPI projections. We are having a great deal of difficulty with the panel sample. There are many refusals, and many of the sample cases are refusals or no-contacts from previous waves. It also 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.   We will work with the PIs to determine how to move forward with the panel sample.

We are having an issue with the new design in terms of getting interviewers to charge time appropriate on Tenrox. Interviewers are still heavily charging D-AMP when they should be charging Healthy Brain. This is being reviewed and heavily emphasized with both TLs and interviewers. We have also alerted DCO that interviewers should charge time in sync with how respondent payments have been paid out by that interviewer over the pay period. Reports are being updated in order to help TLs with their review of Tenrox entries.

Priority for interview completion:
 - Convenience
 - D-AMP Panel
 - D-AMP New

Finances on the study will be very tight, and careful monitoring will be needed. Two factors we will continuously review are agreement to Healthy Brain further research and the Convenience sample costs as that is the bulk of the interviewing left.   Those numbers will help determine whether we are going to reach our target of 200 - New / 400 - Convenience / 200 - Panel.

Production Milestones for July:
On July 1st we paused screening for D-AMP new sample lines as we had spawned enough to reach the 200 target. On July 2nd we implemented the change to the Healthy Brain question at the end of the survey which helps field production determine which project to charge. Unfortunately, we did not get IRB approval to actually charge production until July 15th. As of the 15th, IWERs can charge Healthy Brain for those that agree to further research which includes an MRI or a Blood draw. At present, including all data back to July 2nd, roughly 60 to 65% agree to Healthy Brain.

Special Issues			
Cost as of Aug 21, 2024	***Total Cost to Date (direct + indirect):***		3,272,499.30
	Est Cost at Completion (E$AC):		3,749,362.17
	Total Budget:		3,758,127.00
	Variance (Total Budget minus- E$AC):		8,764.83
	Reason for Variance:	We expect the project to use the full budget for production. We are still fine-tuning the split in expenses between D-AMP and Healthy Brain.	
Projections as of Aug 21, 2024	***Dollars Projected for Month:***		-2,489.49
	Actual Dollars Used:		96,724.44
	Variance (Projected minus Actual):		-99,213.93
	Reason for Variance:	A number of journal entries that were expected to hit in July did not get processed, leading to an overrun in projections for the month.	

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:	211/15/62	39% scrnr; 39% new	9.0 new/~14 panel
	Estimate at Complete:			
	Variance:			
Other Measures	Actuals are as of 7/31/2024			

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	July, 2024 (Healthy Brain Project) Implementing
Risk Level	Some Concerns
Monthly Updates	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.

The goals for D-AMP and Healthy Brain are to complete 200 new sample cases, 400 convenience sample cases and 200 panel sample cases in total for the two projects. This continues to be our goal, however we will stretch this as budget allows. We are carefully evaluating month-by-month costs and will extend the project if we can. The convenience sample is coming in a little under the original HPI projections (4 HPI vs 6.5 budgeted), however the panel sample is coming in much higher than the HPI projections. The convenience sample is requiring a great deal of hands-on management and intervention on the part of the PIs, the SRO senior project manager and the production managers, requiring almost daily conversations. This is something that we will need to adjust for in our projections. As noted in the D-AMP report, the panel sample is also very difficult, with many refusals.

We are having an issue with the new design in terms of getting interviewers to charge time appropriate on Tenrox. Interviewers are still heavily charging D-AMP when they should be charging Healthy Brain. This is being reviewed and heavily emphasized with both TLs and interviewers. We have also alerted DCO that interviewers should charge time in sync with how respondent payments have been paid out by that interviewer over the pay period. Reports are being updated in order to help TLs with their review of Tenrox entries.

Priority for interview completion:
 - Convenience
 - D-AMP Panel
 - D-AMP New

Production Milestones for July:
On July 2nd we implemented the change to the Healthy Brain question at the end of the survey which helps field production determine which project to charge. Unfortunately, we did not get IRB approval to actually charge production until July 15th. As of the 15th, IWERs can charge Healthy Brain for those that agree to be contacted for further research which includes an MRI or a Blood draw. At present, including all data back to July 2nd, roughly 60 to 65% agree to Healthy Brain.

Special Issues

Cost as of Aug 21, 2024	Total Cost to Date (direct + indirect):	283,513.08
	Est Cost at Completion (E$AC):	1,530,040.55
	Total Budget:	1,537,306.00
	Variance (Total Budget minus- E$AC):	7,265.45
	Reason for Variance:	At present, we expect that the full project budget will be spent. Production was delayed due to IRB delays, and did not start at the beginning of July as expected.
Projections as of Aug 21, 2024	Dollars Projected for Month:	201,026.47
	Actual Dollars Used:	70,535.30
	Variance (Projected minus Actual):	130,491.17
	Reason for Variance:	Production was delayed due to IRB delays, and did not start at the beginning of the month as expected. This led to expenses being far lower than anticipated.

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

Other Measures

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

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

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

Report Period	July, 2024 (HRS 2022 Panel & Baselines)	Implementing
Risk Level	Some Concerns	
Monthly Updates	1. The project team has been working on baseline production monitoring, cost monitoring, sample management, logging, weekly mailings and scanning(SSA and SAQ), payment and letter request processing, and implementing the baseline end game protocol. 2. Baseline production remained steady the past month (average of 45 iw/week) and the % of baseline attempted each week in staffed areas continues to increase. Interviewers continue to work less hours than projected for baselines - baseline sample per interviewer is low so the team discussed additional strategies to boost production (eg., offering proxy option for 2nd R in household, re-releasing endgame sample that had no contact in PSUs where work is needed, changes to the endgame criteria through an experiment). 3. Recruitment and training prep began for an end of September training in Grand Rapids. Goal # IWers: 80 4. Of the 8,426 baseline cases that have ever been flagged priority, 1,878 (22%) have completed an interview. Newly generated baselines from screening continue to be flagged on a weekly basis. 5. The endgame protocol sample consists of households with 12 (FTF+TEL) attempts, or resistance, or 120+ since screened. The sample is mailed a letter offering an additional $100 upon completion of the interview and interviewers follow-up with one attempt before final coding non-interview, unless the interview was started on the spot or an appointment has been scheduled. 7,893 baseline respondents have been mailed the end game letter, of which 746 (9%) have completed the interview. New cases are flagged for end game weekly. 6. Address sorting continued in preparation for selection and release of more screener sample. Additional staff will be trained in order to finish the sorting by mid September. 7. SurveyTrak and Blaise programming finalized for sub-sampling the minority older cohorts (MOC) in screener releases 7+. MOCs still generated from screener releases 1 through 6. 8. Screening and Baseline goals updated based on actuals to date (New Cohort Budget is under HRS 2022 Screening MPR). *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	- Did not meet the Panel response rate goal of 74% even with the additional five months of field time and responsive design strategies due to interviewer count and balancing effort with new cohort screening/baseline iws. - Slow progress with baseline interviewing. - Multiple Blaise issues that have impacted STrak and MSMS throughout data collection. - 2022 New Cohort data collection projected to end in May 2025 in order to meet goal. - Competing project team demands with HRS 2022 and HRS 2024 simultaneous data collections as well as multiple trainings planned for both in spring and fall 2024. - High field staff attrition rate. Burden on staff with additional recruitment and training efforts while managing production.	

Cost as of	***Total Cost to Date (direct + indirect):***	18,091,790.31
	Est Cost at Completion (E$AC):	18,078,938.31
	Total Budget:	19,016,630.00
	Variance (Total Budget minus- E$AC):	937,691.69
	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	***Dollars Projected for Month:***	-1,686.40
	Actual Dollars Used:	-1,149.64
	Variance (Projected minus Actual):	-536.76
	Reason for Variance:	Minimal variance.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	18,999	52%	12.0
	Goal at Completion:	22,215	44%	8.3
	Current Actual:	18,993	53%	12.0
	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: 4,055 iws from 14,229 baselines spawned from screener as of 8/19/24. Current RR: 28.8%% 2019 EGenX baselines: Goal RR: 70%, Current RR: 74.4% (497 iws)

Project Name	(HRS 2024) Health and Retirement Study 2024 (Some Concerns)		
Project Mode	Primary: Mixed Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 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	July, 2024 (HRS 2024)	Implementing
Risk Level	Some Concerns	

Monthly Updates	-HRS 2024 activities continued with cost projections, technical specifications, technical development, testing, precontact mailing preparations, and pre-pay check processing. -Testing was on hold for Web Panel (web self iw and MSMS) until end of July. It resumed once a fix was delivered by CBS and HRS programmer updated shared preload logic. -Training and recruitment planning began in preparation for an October 2024 training of ~80 interviewers. -Budget analysts waiting instruction from HRS on how to handle moving Nonsals and January salary costs from the old award to the new award. -Additional sample and preload will be delivered to SRO in fall of 2024 (amount of sample ~1,700) -Production has been going well. Interviewers have exceeded hours and interview goals every week in July. Measures in table below are as of 8/19/24.
Special Issues	-Blaise 5.14 issues related to the feature added at HRS' request for saving session database online and offline affecting the start of Web Panel.

Cost as of Aug 17, 2024	*Total Cost to Date (direct + indirect):*	5,055,844.72
	Est Cost at Completion (E$AC):	20,275,332.54
	Total Budget:	21,477,508.00
	Variance (Total Budget minus- E$AC):	1,202,175.46
	Reason for Variance:	Total budget will be updated once final approval received from HRS. Variance since last month due to decreasing the unnamed SSA and SSS hours. Non-sal charges (hosting, rpay) that didn't hit in July have not yet been pushed forward but this will be reviewed when the lead budget analyst returns.
Projections as of Aug 17, 2024	*Dollars Projected for Month:*	2,562,071.36
	Actual Dollars Used:	913,880.90
	Variance (Projected minus Actual):	1,648,190.46
	Reason for Variance:	Variance due to hours moved from unnamed role to named staff; respondent payments, travel, iwer and admin assistant hours were below projections; training costs did not hit as projected.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	3,627	17.3%	7.0
	Goal at Completion:	17,341	70%	9.3
	Current Actual:	3,488	16.6%	7.4
	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 Investigator/Clients	David Weir (SRC)		
	Helen Levy (SRC)		
	Ken Langa (SRC)		
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Evanthia Leissou		
	Budget Analyst: Richard Warren Krause		
	Production Manager:		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Andrew L Hupp		
	Production Manager 2: Theresa Camelo		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample.		
SRO Project Period	02/2021 - 08/2024		
Data Col Period	03/2022 - 06/2024		
Security Plan	NA		

Milestones	*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	July, 2024 (HRS2022-Screening)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Screening is going at a steady pace. We've been exceeding both production and effort (hours) goals on screening. Release 7 is in the field. DMSS is in the process of preparing Release 8 so we can mail web invitations and release to the field as necessary.	
	We have released 13,367 cases to the endgame protocol. 1,148 cases (8.6%) of cases have completed a screener. 103 cases (9.0%) completed via the web, and 1,045 (91.0%) of cases completed in-person. Flagging of endgame cases has resumed.	

Replicates 3 and 4 have been sorted. Paul will be 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 Aug 13, 2024	**Total Cost to Date (direct + indirect):**			25,969,965.53
	Est Cost at Completion (E$AC):			35,184,631.62
	Total Budget:			28,919,242.00
	Variance (Total Budget minus- E$AC):			-6,265,389.62
	Reason for Variance:	Projections have been entered through March 2025 (projection of when we would meet the baseline production goal).		
Projections as of Aug 13, 2024	**Dollars Projected for Month:**			1,150,591.85
	Actual Dollars Used:			702,248.24
	Variance (Projected minus Actual):			448,343.61
	Reason for Variance:	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	**(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	July, 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.
Special Issues	- Budgeted goal of 54% seems high considering the sample consists of past wave non-responders and a few new spouses. The Spring LHMS, which also consisted of past wave non-responders, current response rate (as of 7/25/2024) is 17%.

Cost as of Aug 17, 2024	Total Cost to Date (direct + indirect):		332,968.03
	Est Cost at Completion (E$AC):		260,888.03
	Total Budget:		505,359.00
	Variance (Total Budget minus- E$AC):		244,470.97
	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 Aug 17, 2024	Dollars Projected for Month:		0.00
	Actual Dollars Used:		320.31
	Variance (Projected minus Actual):		-320.31
	Reason for Variance:	Programming for coding system set-up billed to wrong shortcode.	

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	July, 2024 (LHMS 2023 Spring)	Implementing
Risk Level	On Track	
Monthly Updates	July Activities and Notable Events for Spring and Fall:	

	1- SAQs received and logged	
	2- SRO team members attended monthly check-in meeting with HRS Staff	
	3- Monthly budget projection meeting with financial analyst	
	4- Coding data delivered by HRS staff	
	5 - Scanned SAQs and data delivered to HRS Staff	

Special Issues	Finance wants to bill current/future fall activities to the spring shortcode	
Cost as of Aug 17, 2024	**Total Cost to Date (direct + indirect):**	225,648.14
	Est Cost at Completion (E$AC):	239,592.99
	Total Budget:	457,922.00
	Variance (Total Budget minus- E$AC):	218,329.01
	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 Aug 17, 2024	**Dollars Projected for Month:**	-27,997.62
	Actual Dollars Used:	-36,082.57
	Variance (Projected minus Actual):	8,084.95
	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	Nancy Fleischer (U-M School of Public Health (SPH))
Investigator/Clients	
Funding Agency	MDHHS - Releases 1 - 8

IRB	***HUM#:*** HUM00234617	***Period of Approval:*** 6/15/2023-6/14/2028

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

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

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

Report Period	July, 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
	- Releases 9 - 16 are now in field
	- We now have 4 Arabic IWs and hope to get a few more before end of field
	- 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 71% RR.
	- REL 10 reminder called was extended as well to hopefully get to above 70%.
	Continuing to investigate minor bugs which don't impact the survey but does require some manual manipulation to get result codes/statuses correct. We don't believe this is a Blaise upgrade issue but we did not see any prior to the upgrade. ANES has delayed our ability to get the review completed but hope to have the issue identified and resolution soon.
	Cognitive refusals for CASI completed main surveys for REL 9-16 have a 20% higher refusal rate that what was seen in REL 1-8. Conversely, CATI completed main surveys for REL 9-16 saw a 7% lower refusal rate...
	There was another ORIO filed for MICReSS. A R's spouse completed the survey and when attempting to complete the Cognition section via CATI it was discovered the R had killed them self due to long COVID. The PIs reached out to the IRB for advice on potentially contacting the R's spouse for a case study and it was determined to go the ORIO route to make this happen.
	Expecting $165,000 underrun through Sept 30 and will need a carryforward to Year 5 which will finish out the MICReSS project.

Special Issues	

Cost as of Aug 17, 2024	**Total Cost to Date (direct + indirect):**		674,415.13
	Est Cost at Completion (E$AC):		832,500.36
	Total Budget:		998,480.00
	Variance (Total Budget minus- E$AC):		165,979.64
	Reason for Variance:	Carry Forward from FO1 included and fewer hours being put on the project.	

Projections as of Aug 17, 2024	**Dollars Projected for Month:**		78,678.02
	Actual Dollars Used:		63,904.88
	Variance (Projected minus Actual):		14,773.14
	Reason for Variance:	This month underrun was mainly due to fewer IWER hours than expected and timing of Respondent payments. Should see an overrun in August.	

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	3300	70%	3
	Goal at Completion:	3650	80%	6
	Current Actual:	3279	69.88%	6.0
	Estimate at Complete:	3650	75%	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: Gregg Peterson		
	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 (either FTF or remotely without visiting the schools). (b) panels of high school graduates aged 19-30, 35, 40,45, 50, 55, and 60 (now primarily surveyed by web). Panel members aged 19-30 are invited to participate every other year/asked to complete a web survey and the older sample members are sent questionnaires (mail and web) at five-year interval. The MTF panel study has three parts - early in the year a newsletter is mailed to panel members. If the newsletter is returned (undelivered) locating effort targets these panel members and others who have not participated for X years. The web panel launches (web) in spring and in around June a telephone non-response effort begins for those invited to participate. The panel members are recruited from the 12th graders who participate in the base year study. Press releases and published results can be found here.. http://www.monitoringthefuture.org/		
SRO Project Period	04/2022 - 03/2027		
Data Col Period	04/2022 - 03/2027		
Security Plan	Yes		

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

Other Project Team Members	Hueichun Peng Technical Lead (WebSMS and 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	July, 2024 (MTF Base Year 2022_27)	Implementing
Risk Level	On Track	
Monthly Updates	July 2024 Minimal activity during July. - some further travel and freight costs were charged to the project. - Max has begun working with Hueichun to learn the MTF systems to enable him to become Hueichun's back-up when needed. - Peggy and Rebecca have reviewed feedback from the interviewer debrief and other notes. - Planning is underway for five interviewers to make some FTF school recruitment visits beginning in September.	

Special Issues

Cost as of Aug 17, 2024	*Total Cost to Date (direct + indirect):*	2,849,347.37
	Est Cost at Completion (E$AC):	7,151,126.91
	Total Budget:	9,778,060.00
	Variance (Total Budget minus- E$AC):	2,626,933.09
	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 Aug 17, 2024	*Dollars Projected for Month:*	34,053.58
	Actual Dollars Used:	20,040.67
	Variance (Projected minus Actual):	14,012.91
	Reason for Variance:	Over projected freight costs (I intend on obtaining the actual cost for each crate of equipment we send to interviewers and update the projections for next wave onwards).

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

Other Measures

Project Name	**(MTF Early Panel Pilot) Monitoring the Future: A Cohort-Sequential Panel Study of Drug Use, Ages 19-65 - Administrative Supplement #1 (8/10th Grade Panel) (On Track)**
Project Mode	Primary: Web
Project Type	Sponsored Projects
Budget	**Direct Budget**: 184,954.00 **Indirect Budget:** 103,575.00 **Total Budget:** 288,529.00
Principal Investigator/Clients	Megan Patrick (ISR, SRC)
Funding Agency	
IRB	*HUM#:* 00244359 *Period of Approval:*
Project Team	*Project Lead:* Donnalee Ann Grey-Farquharson
	Budget Analyst: Dean E Stevens
	Production Manager:
	Senior Project Advisor: Rebecca Gatward
	Production Manager 1:
	Production Manager 2:
Proposal #	no data
Description	After the MTF research team delivers survey specifications for each of the 2 waves of data collection, SRO will program the instruments and conduct integration testing with the sample management system. When testing is complete, SRO will launch the 2024 and 2025 Web survey data collections with an estimated sample size of 600 cases per wave of data collection. The Principal Investigator will identify the sample and deliver contact information including e-mail address to SRO. SRO will conduct reminder calling with an estimated 300 cases for each wave of data collection.
	This budget assumes an overall SRO involvement period of 20 months commencing in March 2024 with the data collections taking place during a 4-month period (for each wave), beginning in May 2024 (for Wave 1) and May 2025 (for Wave 2).
SRO Project Period	12/2023 - 12/2025
Data Col Period	04/2024 - 08/2025
Security Plan	NA

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

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

Report Period	July, 2024 (MTF Early Panel Pilot) Implementing
Risk Level	On Track
Monthly Updates	1. Management - Monitoring the production 2. System - WebSMS running for production as automatically sending invitations and triggering survey after obtaining

electronic parental consents.

3. Data Collection
-Production started - System will automatically send the survey to R upon receiving parent/guardian's consent
-Production Stats: as of 07/31/2024: we didn't have new completes since June.
    - Total completes=25
    - Received 14 parental consents (1 in progress of survey, 13 are not started yet)

Special Issues				
Cost as of Jul 31, 2024	*Total Cost to Date (direct + indirect):*			88,523.78
	Est Cost at Completion (E$AC):			285,068.04
	Total Budget:			288,529.00
	Variance (Total Budget minus- E$AC):			3,460.96
	Reason for Variance:	The underrun amount due to less actual working hours of regular staff in July. We will make adjustments in the next few months.		
Projections as of Jul 31, 2024	*Dollars Projected for Month:*			14,438.29
	Actual Dollars Used:			12,235.37
	Variance (Projected minus Actual):			2,202.92
	Reason for Variance:	The underrun amount due to less actual working hours of regular staff in July. We will make adjustments in the next few months.		

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:		
Proposal #	no data		
Description	This project is a continuation of MTF Illume Web 2021. PI staff will edit and test 12 survey versions, all previously programmed in Illume by SRO. SRO will further test the surveys as part of the systems integration process. All 12 surveys will be launched in 2021. After testing is complete, SRO will launch the 2021 Web survey data collection with an estimated sample size of 20,000 cases identified by the Principal Investigator who will deliver the contact information including e-mail address to SRO. The Web survey data collection will replace aspects of the standard mail-based data collection. Both the separately funded Winter Location calling effort and Non-Response follow-up calling will include this sample – with the calling effort being integrated with the standard MTF activities.		
SRO Project Period	01/2022 - 03/2027		
Data Col Period	04/2022 - 10/2026		
Security Plan	NA		

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

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

Report Period	July, 2024 (MTF Panel 2022-27)	Implementing
Risk Level	On Track	
Monthly Updates	1. Management - Monitoring the production - Continue to work with the MTF research team to resolve some Qualtrics survey issues. - The first/initial data has been delivered to the research team. - We are gearing up for the MTF Innovation Panel project. We have requested the funds for this project. 2. System	

- WebSMS has been running correctly.

3. Data Collection
-Production Stats: as of 07/31/2024: Accumulated Total=8351 (RR=43.2%)

4. Winter Location
- N/A

5. NR Production/Calling
- Continue to call identified respondents until 08/20.

6. RLM
- identified an technical issue and working to resolve it.

Special Issues		
Cost as of Jul 31, 2024	*Total Cost to Date (direct + indirect):*	1,783,928.80
	Est Cost at Completion (E$AC):	4,033,877.47
	Total Budget:	3,895,217.00
	Variance (Total Budget minus- E$AC):	-138,660.47
	Reason for Variance:	The total project budget includes MTF Web (Qualtrics), Non-Response Calling, and the Winter Location project. The variance over the next three years is due to all SRO MTF team members with a Survey Specialist or Survey Director title receiving a market rate salary adjustment, retroactive to February 2024. This has a significant impact on the projections and budget. Additionally, we are expecting the interviewer rate to change in August 2024. However, the overrun amount has been reduced through continuous adjustments from August onwards.
Projections as of Jul 31, 2024	*Dollars Projected for Month:*	130,291.20
	Actual Dollars Used:	114,482.81
	Variance (Projected minus Actual):	15,808.39
	Reason for Variance:	Regular SRO staff used fewer hours than projected, resulting in an underrun for the project.

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	July, 2024 (NDWS)	Planning

Risk Level	On Track

Monthly Updates	July activities: * The NDWS project had a change of NIH program officer at the beginning of the month (John Phillips). The new PO was willing to discuss a revised project implementation timeline. The NDWS PIs, SRO team, and research partners collaborated to propose a new timeline that was, while still ambitious, much more realistic and feasible. This new timeline allowed for the start of Year 1 data collection a few weeks later (mid-Aug), which was also necessary given that we hadn't yet received IRB approval for data collection to begin, and extended data collection by 7 weeks to mid-December. We also eliminated the Year 1 preliminary data release and moved back the full data release to March 2025. In all, most of the timeline was moved back ~2 months. * Major focus of pre-production activities included testing survey instruments prepared by our data collection partners (RTI & DLH). This included updating specs & codebooks for the 7 survey instruments. * Data collection IRB approval was received 7/18/24. However, each participating site (DLH, RTI) now needs to go through a review process as well. * A final decision was made to send email survey invitations from research partners directly (i.e., the invitations will come from @rti.org and @dlhcorp.com was adequate, though DLH is looking at using a different domain that incorporates "NDWS"). * Continued conversations with our data collection partners about reporting & dashboards. * We determined that each data collection partner will implement the second stage (i.e. staff) sample selection based on direction from James Wagner rather than sending sample to U-M for selection. James drafted and discussed the plans with each partner. * We returned to discussions about Year 2 sample frame development for the assisted living facilities and home care agencies and began to identify staff to assist with each. * Onboarded two new SRO staff who are joining our project team: Dedra Campbell & Jackson Collier.

Special Issues

Cost as of Aug 17, 2024	Total Cost to Date (direct + indirect):	476,448.54
	Est Cost at Completion (E$AC):	4,160,988.38
	Total Budget:	6,750,973.00
	Variance (Total Budget minus- E$AC):	2,589,984.62
	Reason for Variance:	
Projections as of Aug 17, 2024	Dollars Projected for Month:	77,348.06
	Actual Dollars Used:	55,001.76
	Variance (Projected minus Actual):	22,346.30
	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	July, 2024 (PR-PSID)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Pretest Data Processing work continues. The data has been extracted and will be organized initially by interview section. SRO is also preparing detailed documentation on key variables that can be merged.	

SRO raised concerns about Americorps contract funding mechanism with PIs -- will schedule meeting with FSG to discuss options. SRO reviewed Americorps Statement of Work to look for references to FISMA compliance; no references were found. PIs mentioned that they are also requesting additional funds from USDA. If awarded, these funds would come through an Interagency Agreement through NSF.

SRO learned that the NIA grant application for 2025 wave has fallen through (If funding had been granted, it would have added additional sample and multiplicity to the 2025 wave, and an HCAP wave). PIs are seeking additional NIA funding for 2027.

DMSS will begin working on sample selection. Sample will be released in replicates (planning for 3 replicates). Each replicate will have sample from all of the selected segments. DMSS will ensure that sample lines selected for PR-PSID are not also selected for the CPS study (listing partner). Projections were added so that DMSS can analyze the results of the first replicate, and advise on when to release the third replicate, and how much sample to include.

Special Issues	Overrun significantly increased after rate increases due to ~5,500 hours projected at the SSI level for Post Collection Processing. Much of the Post Collection Processing that is planned is new for SRO -- we do not yet know whether so many hours will be required for PCP, and at what level the work will ultimately be staffed at.
Cost as of Aug 17, 2024	**Total Cost to Date (direct + indirect):** 606,635.98
	Est Cost at Completion (E$AC): 1,485,090.29
	Total Budget: 1,292,585.00
	Variance (Total Budget minus- E$AC): -192,505.29
	Reason for Variance: Projected cost to complete decreased by ~$2.2K between June & July -- biggest driver was fringe rate fluctuation.
Projections as of Aug 17, 2024	**Dollars Projected for Month:** 3,938.00
	Actual Dollars Used: 2,531.42
	Variance (Projected minus Actual): 1,406.58
	Reason for Variance: Pretest data processing actuals for July were lower than projected.

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	July, 2024 (PSID 2025 OCU)	Implementing
Risk Level	On Track	
Monthly Updates	IRB amendment was submitted -- amendment was approved on 7/23.	

SRO translated the FES newsletter. Translations were not included in the original budget, but PI approved of scope change and approved adding hours to cover translation.

Prod Data test was completed. PSID reviewed data and requested changes to some variable names. PSID also requested that we change Blaise programming to prevent e-pay if there had been any NAPE changes. PSID will need to manually reviews all cases with NAPE changes, and will not be able to review & process e-payments within 24-48 hours (Web survey specifies R should expect the link in about 48 hours). SRO updated the Blaise programming, completed additional prod data tests, and redelivered the data on 8/5.

SRO expected to receive the preload from PSID on August 5th. PSID ran into issues creating the preload for non-interview cases and needed to provide the preload in batches. Batch 1 preload will include all completed IWs (1001s & 1005s) from Core 23 and TAS 23 -- initially scheduled to be delivered on 8/12. However, SRO received the preload file on 8/15. Timeline for batch 2 is still TBD.

Special Issues			
Cost as of Aug 17, 2024	**Total Cost to Date (direct + indirect):**		54,026.35
	Est Cost at Completion (E$AC):		80,561.05
	Total Budget:		81,686.00
	Variance (Total Budget minus- E$AC):		1,124.95
	Reason for Variance:	Blaise programming actuals lower than projected.	
Projections as of Aug 17, 2024	**Dollars Projected for Month:**		14,939.88
	Actual Dollars Used:		13,467.61
	Variance (Projected minus Actual):		1,472.27
	Reason for Variance:	Projected cost to complete decreased by ~4.6K between June & July -- biggest driver was moving MSMS programming hours to OH contingency account	

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	July, 2024 (PSID CDS 2023)	Implementing
Risk Level	On Track	
Monthly Updates	CDS data collection in in week 31 of the planned 36 to finish Phase1. Phase 2 (Saliva collection) starts in September 2024. Our current goals and progress: -- CS: completed 2,465, 77.3%. We need ~ n=90 CS completed in the next 3 weeks to achieve ~ 80% RR although PIs agreed to end CS on 9-8-2024 regardless of whether or not 80% will be exactly met.	

-- PCG: completed 2040 of the planned 2376 (assuming 80% CS and 93% PCG completion). PCG interviews are going well with 83% of active sample completed.
-- Adolescent: completed 967 of the planned 1014 (assuming 80% CS, 95% PCG, 87% PCG consent rate, and matching 2021 Adolescent interview rate). Adolescent completion this wave benefited from the new Web mode -- 77% of Adolescents completed compared to 51% in 2021. 85% of IVR interviews completed with Adolescents eligible for IVR (along with the phone interview) -- compared to 84% overall in '21 (which required a dedicated IVR follow up).

Staff:
Post training attrition remains low (13%) but ~ 18 interviewers are leaving on 8-31-2024 to join ANES.
-- 42 interviewers
-- we see some impact of sharing on hours, CDS staff is shared with other projects (PSID Saliva, MTF, BFY, etc.)

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

Phase 2 update:
The scope of Phase 2 was narrowed due to PIs request to minimize PSID respondent burden by limiting the number of interactions and shortening the project to end in January. Current plan calls for 19 weeks of data collection and includes staffing of 19 iwers, 1 locator, and 4 TLs (TLs will also travel/interview as needed). We will follow a mail-out/back saliva protocol - estimating all kits will be mailed by mid- to end-October and planning in-person follow up with ~ 30% of families.

Phase 2 preparations continue with the study protocol finalized and moving forward with programming and implementation. Recent activities include ST and Weblog projects testing, kitting and logging prep, training pre, finalizing staff list, and sample assignment/release schedule.

Timeline:
Advance notification week of 9-15
Training 9-17, 9-24 (4 - 8 hours total)
Kitting starts 9-16
First saliva kits (incl. advance token) sent 9-20

Tech development
No instrument
SurveyTrak & Weblog
Mapping application
Maybe Qualtrics and Tango ?? prepayment survey
OLIVE for Ver/no plans for Eval

Special Issues				
Cost as of Aug 17, 2024	*Total Cost to Date (direct + indirect):*			3,191,908.14
	Est Cost at Completion (E$AC):			6,248,707.16
	Total Budget:			7,280,680.57
	Variance (Total Budget minus- E$AC):			1,031,973.41
	Reason for Variance:	We have been underrunning monthly but recently updated projections to include expected Phase 1 end and refine interviewer projections which preserved the accumulated underrun but should stop further monthly underruns.		
Projections as of Aug 17, 2024	*Dollars Projected for Month:*			543,891.37
	Actual Dollars Used:			444,200.85
	Variance (Projected minus Actual):			99,690.52
	Reason for Variance:	Moving forward, monthly projections have been adjusted to be more accurate and stop monthly underruns, however, we are still using less iwer hours than expected.		

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

Project Name	**(PSID TAS 2023) Transition to Adulthood within its Life Course & Intergenerational Family Context (On Track)**		
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 934,249.00	**Indirect Budget:** 523,179.00	**Total Budget:** 1,457,428.00
Principal Investigator/Clients	Narayan Sastry (U-M PSC SRC)		
Funding Agency			
IRB	*HUM#:* 00112629		*Period of Approval:*
Project Team	*Project Lead:* Elizabeth Ohryn		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager: Narine Verdiyan		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Daric Thorne		
	Production Manager 2:		
Proposal #	no data		
Description	TAS 2023 is the 10th Wave of TAS study, part of the PSID Suite of projects. 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	July, 2024 (PSID TAS 2023)	Closing
Risk Level	On Track	
Monthly Updates	July Project Updates Reporting - Due to the delay in finalizing TAS cases, the final curated dataset was delivered three weeks later than expected.	

This was largely due to the July holiday and the complication of moving partials finalized via CATI to the correct mode of completion.

Management:
A variety of debriefs continued into July. The focus of these meetings continues to be creating additional project efficiencies and enhancements. Debriefs included: Data collection, Project management, Training, and Tech teams.

Other
Coding: The coding team continues to work on the first (and largest) batch of Occ/IND + Internship responses to code (n=1249). Both batch one and two are expected to be delivered by Oct 2024.

Special Issues				
Cost as of Aug 21, 2024	**Total Cost to Date (direct + indirect):**			1,342,969.52
	Est Cost at Completion (E$AC):			1,370,621.98
	Total Budget:			1,457,428.00
	Variance (Total Budget minus- E$AC):			86,806.02
	Reason for Variance:	The biggest driver of this reduction is due to fewer hours needed across tech and management categories.		
Projections as of Aug 21, 2024	**Dollars Projected for Month:**			20,932.01
	Actual Dollars Used:			14,732.57
	Variance (Projected minus Actual):			6,199.44
	Reason for Variance:	The biggest driver of this decrease was the slight decrease to project associate manager hours.		

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	July, 2024 (PSID23)	Implementing
Risk Level	On Track	
Monthly Updates	Summary of July 2024 Activities Saliva Collection Cleaning data for initial delivery of final data sets on 8/1. Preparing to close the project--including inventorying supplies. Last delivery to BSL on 7/31.	
Special Issues	Saliva data collection (including FTF visits) started later than originally planned. Saliva RR short of budgeted target (44%).	

Cost as of Aug 20, 2024	*Total Cost to Date (direct + indirect):*	5,652,470.89
	Est Cost at Completion (E$AC):	5,674,416.35
	Total Budget:	6,235,802.00
	Variance (Total Budget minus- E$AC):	561,385.65
	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 Aug 20, 2024	*Dollars Projected for Month:*	17,336.20
	Actual Dollars Used:	11,503.28
	Variance (Projected minus Actual):	5,833.54
	Reason for Variance:	Main driver of underrun: Non-salary costs hit lower than projected. 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	July, 2024 (PSID25)	Implementing
Risk Level	On Track	

Monthly Updates	Summary of July 2024 Activities:

PI Updates/Decisions:
Submitted an IRB amendment on 7/2 that contained updates for Pretest; it was approved on 7/23. On 7/23, delivered a memo with a summary of the FPS considerations, steps taken, and future plans. Discussed FPS in detail with PIs and study staff on 7/30. No major changes requested for PSID25 but planning to explore alternatives for PSID27. Systematic testing and careful, early-production monitoring and QC are key to identifying and addressing FPS concerns before becoming a widespread data cleaning issue.

Technical development:
MSMS: The first integration testing project was released at the start of July. Testing meetings were established that include individuals with testing and direct field experience. A new test line generator was built and tested, making releasing new lines easier. Some ongoing issues prevented fuller testing until the week of 7/8. Some issues have been resolved. The majority of the integration testers were added into project week of 7/22. Revisions to short messages continued throughout the month while programmers attempted to find fixes. Some issues were identified during testing regarding pushing specific locator and proxy details into the Blaise instrument. These issues are slated for correction in the full production project in March, 2025. Known issues around specific web-kick outs were tested the week of 7/22. PSID study staff has requested that we build a human contacts indicator, and this is being explored.

Blaise: Received and programmed all English sections; on-going programming to address bug fixes. SRO is currently exploring a request by project staff to improve the process for restoring reset interviews from audit data. FPS (i.e., isVisited and remark data) testing resulted in no needed changes. Interviewers will test this further during pretest production. The team determined that we should reasonably expect about 1% of SIDs to experience FPS loss. Some Blaise rules were identified regarding locator details, but are not necessary to correct for pretest.

Preload builder: We continued developing and testing the preload builder instrument, and responding to comments entered into CTT by testers. A data model was signed off on for use in pretest. Data Managers are beginning to verify plans to use preload data to load into pretest and prod data projects. By the week of 7/29, the preload builder was ready for production.

68ID site: Updates to the 68ID site are still underway, and deadlines for some items' deadlines were extended due to programmer availability. Search page delivered by 7/15, appointments page released by 7/22, and contact attempts delivered by 7/29. Addresses and within family listing (viewing profiles and family listing download) along with saving changes to the family note were delayed until August.

Training:
Continued preparing for Pretest Recruitment/Preload Builder Training to be held on August 6th. The Pretest Production Training is scheduled for September 9th, 10th, 12th, and 13th. HOPS will be held on Wednesday, September 11. Training content and the agenda have been finalized. There will be 11 on-staffers at this Zoom training. The team is working 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. We aim to test key technical protocols and updates in preparation for Core. Core T1 training planning is also underway.

Special Issues		
Cost as of Aug 20, 2024	**Total Cost to Date (direct + indirect):**	378,191.29
	Est Cost at Completion (E$AC):	8,169,946.11
	Total Budget:	7,805,285.00
	Variance (Total Budget minus- E$AC):	-364,661.11
	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 management effort, including by expanding technical capabilities.
Projections as of Aug 20, 2024	**Dollars Projected for Month:**	146,992.41
	Actual Dollars Used:	123,100.22
	Variance (Projected minus Actual):	23,892.19
	Reason for Variance:	The July underrun was mainly due to the over-projected hours in categories such as Help Desk Coordinator/Supervisor, General Programmer/Analyst, Systems Analysis & Programming Director, and Survey Specialists/Director.

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.			

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

	Estimate at Complete:	9,994
	Variance:	

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	Periodic reminders will be sent via e-mail and text. Non-response follow up calls will be made by the SRO Interviewers to respondents who did not complete the survey online. 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:	*SS Train End:*
	DC Start:	*DC End:* 10/30/2024

Other Project Team Members	Data Manager - Brianna Sabol; Blaise Programmer - Dave Dybicki;
Other Project Name	
Sample Mgmt System	SMS
Data Col Tool	Blaise 4.8
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	July, 2024 (SAND COVID Follow-Up)	Planning
Risk Level	On Track	
Monthly Updates	July Update	

July Update

The SAND COVID Follow-up study continues to move forward with finalizing technical systems and planning for a data collection start. The moving timeline originally focused on a June start, is now adjusted for a production launch on August 5.

Data Management
SRO continues to work with the SAND project team is providing up-to-date respondent information for both the young adults (YA) and their primary caregiver (PCG) that will be invited to complete the web interview. Final sign off of accuracy was provided by the SAND project team on July 18.

Technical
Using a prior SRO project as the base of programming, Blaise SMS is being programmed for non-response calling

that will include text messaging using QR codes.

Management Team
The management team is busy will prepping for interviewer training on August 1. Interviewers will receive 4-hours of training that will focus on the push-to-web portion of the project with further training on non-response calling in August.

The SRO team reviewed and provided feedback on the Qualtrics survey, which was appreciated by the PI team.

Data Collection
TL Training took place on July 11. The TLs will begin locating SAND Rs but will not make any outreach attempts until the start of data collection in August.
The project has eight interviewers and four team leaders assigned to SAND. Interviewer training takes place on Aug 1. This is to current attrition.

Special Issues	Final sample estimates and data collection measures are TBD.			
Cost as of Aug 17, 2024	**Total Cost to Date (direct + indirect):**			39,678.19
	Est Cost at Completion (E$AC):			203,180.57
	Total Budget:			219,994.00
	Variance (Total Budget minus- E$AC):			16,813.43
	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 Aug 17, 2024	**Dollars Projected for Month:**			34,872.90
	Actual Dollars Used:			29,901.30
	Variance (Projected minus Actual):			4,971.60
	Reason for Variance:	ST hours are less than expected due to a delay in the start of production.		

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	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	July, 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 Aug 17, 2024	*Total Cost to Date (direct + indirect):*		678,653.44
	Est Cost at Completion (E$AC):		680,289.44
	Total Budget:		696,383.00
	Variance (Total Budget minus- E$AC):		16,093.56
	Reason for Variance:	This represents a $3,879.11 increase in the underrun reported in June. Lower than projected hours for Post Data Collection Processing and interviewing hours during the June study month led to this increase.	
Projections as of Aug 17, 2024	*Dollars Projected for Month:*		10,939.05
	Actual Dollars Used:		7,003.64
	Variance (Projected minus Actual):		3,935.41
	Reason for Variance:	July 2024 totaled $7,003.64. Remaining projections are minimal. Some archiving activities will still take place during the August calendar month, but additional costs to the project are not anticipated at this time.	

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 complete 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) Meredith House (Survey Director) 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	July, 2024 (SCA Web)	Implementing
Risk Level	On Track	
Monthly Updates	SCA Web ended the July calendar month with 1,034 online interviews. Open ended questions for the online survey were coded by three members of the coding team. 105 of the 1034 cases were coded by two members of the coding team for IRR purposes.	

Special Issues

Cost as of Aug 20, 2024	*Total Cost to Date (direct + indirect):*		9,239.35
	Est Cost at Completion (E$AC):		58,596.15
	Total Budget:		50,730.00
	Variance (Total Budget minus- E$AC):		7,866.15
	Reason for Variance:	Projections for Peter, Jennie, Carolyn, and Karl were increased to better align with the actual hours of work they have been charging to the project.	
Projections as of Aug 20, 2024	*Dollars Projected for Month:*		8,760.90
	Actual Dollars Used:		9,239.35
	Variance (Projected minus Actual):		478.45
	Reason for Variance:	More hours worked than projected for staff members providing technical support.	

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 Investigator/Clients	John Callewaert, PI (SRC, College of Engineering)
	Robert Marans, Co-PI (SRC)
	Noah Webster, Co-PI (SRC)
Funding Agency	
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, with the addition of a re-interview of freshmen from 2021, who will be 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	NA

Report Period	July, 2024 (SCIP 2024)	Initiation

Risk Level	On Track
Monthly Updates	This is a testy
Special Issues	

Cost as of		
	Total Cost to Date (direct + indirect):	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	137,834.00
	Variance (Total Budget minus- E$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	(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	July, 2024 (SRS 2021)	Implementing
Risk Level	Some Concerns	
Monthly Updates	As a reminder, the PIs affirmed the new goal of 1100 new sample cases and 244 panel cases on March 14, 2024. The PIs affirmed in May that they prefer to get more completed cases and will sacrifice a lower screener response rate in order to achieve that goal. We have exceeded that goal, and set a new goal for 1200 new sample cases (with screening beginning again in July), extending the field period until the end of September 2024. We are now carefully examining the budget and projections to see if we can further extend the project and increase the new sample goal.	

We are making scant progress on the panel sample, which we know will be a sore point with the PIs. Many of the sample cases were non-contacts or refusals from previous waves. We also believe that the difficult political climate may be impacting the panel sample in some areas (this was shared with the PIs on August 15. Locating for panel should begin in late August or early September. At present the HPI for the panel sample is far higher than was budgeted (13 HPI vs 9 budgeted) and mileage is higher as well. We will ask the PIs for input on how to handle the panel sample (travel vs programming and IRB submission to allow telephone interviews).

Screening staff is being consolidated in late August. This will allow us to give more work to the remaining interviewers.

Current Staffing for SRS/D-AMP/HB projects:
28 main IWERs of which 10 are bilingual
8 screener only IWERs

Special Issues	Our concerns are with the panel, where we are not making much progress. We are also monitoring cost projections, as monthly expenditures have been lower than anticipated.
Cost as of Aug 21, 2024	***Total Cost to Date (direct + indirect):*** 4,395,182.20
	Est Cost at Completion (E$AC): 5,868,354.26
	Total Budget: 5,876,610.11
	Variance (Total Budget minus- E$AC): 8,255.85
	Reason for Variance: We expect the project to use the full funding amount. We will work with the PIs on a plan to complete more interviews or invest more heavily in the panel sample.
Projections as of Aug 21, 2024	***Dollars Projected for Month:*** 470,713.11
	Actual Dollars Used: 223,572.65
	Variance (Projected minus Actual): 247,140.46
	Reason for Variance: Planned transfers for DAWN screening effort did not hit the project as expected, which led to significantly lower expenses than planned.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	1200 new/244 panel		
	Goal at Completion:	1200 new, 244 panel		
	Current Actual:	1145 new /83 panel	34% scr/49% main	
	Estimate at Complete:			
	Variance:			
Other Measures	Production is shown as of 7/31/2024.			

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

Project Management and Planning:
? James attended the July 15 STARRS IPR briefing.
? 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 We anticipated issue of the Year 5 award. While it will not be needed until the end of September, the back and forth negotiation of contract language between U-M ORSP and HJF takes a minimum of 5 weeks when no issues are encountered.
o The Wave 5 formal proposal package was completed and sent to Dr. Ursano on July 16.
? The Wave 5 IRB protocol:
o Contingencies were addressed and submitted on July 9. One remaining contingency was to apply for and receive a new Certificate of Confidentiality (CoC).
o We applied for the CoC but received some questions from NIH that were difficult to interpret about what the CoC was intended to cover. We met with our IRB administrator and exchanged a number of emails with the U-M IRB, Human Research Protection Program and NIH.
o We finally gained clarification and were able to provide a response to NIH (that the CoC is intended to cover collection and subsequent analysis of survey and administrative data for the single project, STARRS-LS Wave 5).
o Our initial application had been rejected, so we re-applied and received the CoC on July 29.
o We uploaded the CoC to the Wave 5 IRB protocol and received approval on July 30.
? The ORIO for recontacting a Wave 3 withdrawal case in Wave 4 was acknowledged by the U-M IRB on July 12 and by the USUHS IRB on July 26.

Enclave and User Support:
? Annual IA security review: We anticipated a site visit from M&RA and AAG in August or September but at the end of the month learned it will likely not be until after October 1. We started reviewing staff schedules for possible visit dates.
? Annual NDI Data Request: U-M has the submission file ready for the CDC. M&RA continued work to establish payment with the CDC.
? 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.
? Biomarker group request for assistance:
o The Enclave team worked to prepare the data transfer memo for genomic and survey variables to be sent to a Yale researcher.

Public Use Data:
? The quarterly ICPSR user report was sent to USUHS for the GSC on July 22.
? We assisted a USUHS researcher who was having recurring problems getting a response from his POC at ICPSR regarding updating their DUA for accessing the STARRS data on the VDE. We reached out to our ICPSR project manager and her director. We learned the POC is retiring and our project manager will be taking over ICPSR support for STARRS.
? Biosample flags, administrative variables:
o We sent a summary of unique respondents who have biosample flags and administrative data in the upcoming ICPSR release to Dr. Ursano on July 16. We also sent an updated version of the blood/survey counts tables.
o We reviewed the biosample flag and administrative data release and provided minor edits to ICPSR along with the contact information to list on the website for users who have questions about the research/data (Drs. Ursano and Stein) and questions about access to or use of the biosamples (Mr. Ludtke and COL Forrest). We will announce the release on the ICPSR website to the PIs/research team as soon as it is ready.
? 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.
? We awaited decisions from the Army/GSC on producing the genetic and bioassay files for public use and placing data in the NIH National Data Archive and Public use release for GWAS.

Wave 4 Post-Production:
? Harvard sent the indicators for final accepted survey completes and starts to U-M on July 9. We used this information to continue sample reconciliation, which will allow us to create a final Wave 4 sample outcomes dataset and the flow charts.
? During reconciliation, we discovered survey data was missing for 19 cases. We will need to recover these data from back-ups, which will push back the delivery date of the sample outcomes dataset and flow charts to Harvard. Harvard was made aware and we worked on an agreeable adjustment to the timeline.
? The team continued work on open-ended and occupation/industry coding, and final documentation.

Wave 5 Pre-Production:
? U-M sent specifications for Wave 5 survey preload to Harvard on July 10.
? The first round of Wave 5 survey programming was completed and we started instrument testing. We set-up testing accounts for Harvard and internal testers.
? Programming of the sample management system continued; some remaining specification work continued; we wrote testing plans and scenarios.
? The team continued work on QC systems, report development, and taking steps toward Wave 5 sample prep.

Special Issues	We removed the risk about needing to convert the full scope of work for Wave 5 into a formal proposal package as this was accomplished and sent to USUHS in July. The current areas of risk/mitigation strategies are as follows: We continue to track areas of risk and develop mitigation strategies. ? U-M STARRS funding timeline and proposal/agreement needs past Year 5. o U-M will likely experience a gap in funds for continued Wave 5 work after February 2025 until the Year 6 POP award is received (projected to be August 2025 based on past years). SRO and the university are unlikely to authorize a hardship account for more than 2 (maybe 3) months in length 　? There are options for handling the likely gap in funding after February 2025: 　　• Issuing additional funding to U-M from cost savings, 　　• Submitting budgets earlier, and/or 　　• Planning for pre-award spending to be able to start in March 2025. ? Wave 3 consent review and approval process – these risks were described in a September 30, 2020 memo to M&RA. o The DHA Privacy Board has approved the DSA modification for the MHS HIPAA form; however, we will not receive any sort of VA prior approval. With the VA, we could be in a situation where we employ a VA HIPAA authorization form that ends up not being acceptable to the VA when it comes time to request health records data for linkage. While unlikely, it's also possible the approved MHS HIPAA form might not be acceptable to the providers of those data. o The risk related to the VA not having reviewed the HIPAA form prior to production was highlighted in the June 15, 2021 GSC meeting when a question was raised as to whether the VHA HIPAA consent language would allow access to VBA data. ? Scope additions o There are a few cost estimates for new scope that have yet to be made. As decisions are made, we will work with the research team to schedule and implement this work. o We have received some information on additional public use data releases, including release to the NIH National Data Archive. Several unknowns need to be clarified before we can finalize our scope and cost estimates and determine what staffing will be needed for this work.

Cost as of Jun 30, 2024	**Total Cost to Date (direct + indirect):**	11,419,108.68
	Est Cost at Completion (E$AC):	13,647,972.31
	Total Budget:	13,730,116.00
	Variance (Total Budget minus- E$AC):	82,143.69
	Reason for Variance:	General underspending across salary groups. The only projections updates this month were minor adjustments to ICPSR hours/dollars.
Projections as of Jun 30, 2024	**Dollars Projected for Month:**	233,872.42
	Actual Dollars Used:	215,812.61
	Variance (Projected minus Actual):	18,059.81
	Reason for Variance:	General underspending across salary groups; no specific areas of note.

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
TSME24 Blaise 5 version and system testing (423562	Initiatives		Karl A Dinkelmann	☐	☐	☐	☐	☐	☐	☐
TSME24 DCO System Support (483248)	Initiatives	Implementing	Vivienne Y Outlaw	🟡	🟡	🟡	🟡	🟡	🟡	🟢
TSME24 MSMS performance work (425267)	Initiatives	Implementing	Jim Rodgers	🟢	🟢	🟢	🟢	☐	🟢	🟢
TSME25 DCO System Support (483248)	Initiatives	Implementing	Vivienne Y Outlaw	☐	☐	☐	☐	☐	☐	🟢
TSME25 MSMS Line Generator (483227)	Initiatives	Planning	Laura Yoder	☐	☐	☐	☐	☐	☐	🟢
TSME25 QC Systems (483249)	Initiatives	Implementing	Sarah Elisa Broumand	🟢	🟢	🟢	🟢	🟢	🟢	☐
TSME25 System Maintenance - General (483910)	Initiatives	Implementing	Jeffrey L Smith	☐	☐	☐	☐	☐	🟢	🟢
TSME25 Team Dynamix (425197)	Initiatives	Implementing	David Bolt	☐	☐	☐	☐	☐	☐	🟢

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

Report Period	July, 2024 (TSME24 DCO System Support	Implementing
Risk Level	On Track	
Monthly Updates	x	
Special Issues		
Cost as of Aug 17, 2024	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	0.00
	Variance (Total Budget minus- E$AC):	0.00
	Reason for Variance: x	
Projections as of Aug 17, 2024	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	0.00

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

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

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

Project Name	**(TSME24 MSMS performance work (425267)) TSME24 MSMS performance work (425267) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 100,000.00	**Indirect Budget:** 0.00	**Total Budget:** 100,000.00
Principal			
Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Jim Rodgers		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	To be determined		
SRO Project Period	07/2023 - 06/2024		
Data Col Period			
Security Plan	NA		

Milestones	*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	July, 2024 (TSME24 MSMS performance	Implementing
Risk Level	On Track	
Monthly Updates	Proceeding as planned	
Special Issues		
Cost as of	*Total Cost to Date (direct + indirect):*	71,490.26
	Est Cost at Completion (E$AC):	71,490.26
	Total Budget:	100,000.00
	Variance (Total Budget minus- E$AC):	28,509.74
	Reason for Variance: Capacity may not be available	
Projections as of	*Dollars Projected for Month:*	14,804.62
	Actual Dollars Used:	8,808.93

| | **Variance (Projected minus Actual):** | | 5,995.69 |
| | **Reason for Variance:** | Less capacity available than expected | |

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:			

Project Name	**(TSME25 DCO System Support (483248)) TSME25 DCO System Support (483248) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 0.00	**Indirect Budget:** 0.00	**Total Budget:** 0.00
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	July, 2024 (TSME25 DCO System Support (483248))	Implementing
Risk Level	On Track	
Monthly Updates	x	
Special Issues	x	
Cost as of	*Total Cost to Date (direct + indirect):*	35,000.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	0.00
	Variance (Total Budget minus- E$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	x			

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

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:* Laura Yoder		
	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			
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	July, 2024 (TSME25 MSMS Line Generator (483227))	Planning
Risk Level	On Track	
Monthly Updates	No work/no charges	
Special Issues		
Cost as of Aug 20, 2024	*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: See below	
Projections as of Aug 20, 2024	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	0.00

| | | | Variance (Projected minus Actual): | 0.00 |
| | Reason for Variance: | see below | | |

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

Other Measures

| | | | Variance (Projected minus Actual): | 0.00 |
| | Reason for Variance: | see below | | |

Measures		Units at Complete	RR	HPI

| | Current Goal: | | | |
| | Goal at Completion: | | | |

Project Name	**(TSME25 MSMS Performance (425267)) TSME25 MSMS 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	July, 2024 (TSME25 MSMS Performance	Implementing
Risk Level	On Track	
Monthly Updates	Work is proceeding	
Special Issues		
Cost as of	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	100,000.00
	Variance (Total Budget minus- E$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:			

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**: 0.00 **Indirect Budget:** 0.00 **Total Budget:** 0.00
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	July, 2024 (TSME25 System Maintenance ...)	Implementing
Risk Level	On Track	
Monthly Updates	**July Management Summary**	

Summary of Activities:
1. **ColdFusion Rollout Meeting:**
   - Conducted an initial meeting to plan the ColdFusion rollout.
   - Duration: 1 hour.
2. **RCLS and SQLA17 Updates:**
   - Performed updates for RCLS and SQLA17 system components.
   - Duration: 2 hours.
3. **PRER and SQLA17 Updates:**
   - Executed updates for PRER and SQLA17 systems.
   - Duration: 2 hours.
4. **Convert AVI Util / Convert TREC Files:**
   - Bring up to date AVI utility and TREC files for system usage.
   - Duration: 3 hours.

5. **IW Data Merge:**
   - Merged various data sets related to IW in two phases.
   - Duration: 6 hours
6. **Review TSG Git Spreadsheet:**
   - Reviewed and analyzed the TSG Git spreadsheet for accuracy.
   - Duration: 1 hour.
7. **Release Convert AVI App for Production Use:**
   - Released the Convert AVI application for production deployment.
   - Duration: 1 hour.
8. **Setup ST25_NightlyRuns Folder:**
   - Prepared the ST25_NightlyRuns folder in anticipation of MTF 25 events.
   - Duration: 1 hour.
9. **RCLS for SQLA17 Database Maintenance:**
   - Conducted RCLS database maintenance sessions for SQLA17, spread over two phases.
   - Duration: 4.5 hours.
10. **Bi-weekly Meetings:**
    - Attended regular bi-weekly meetings for project updates and team synchronization.
    - Duration: 10 hours.

Individual Contributions:
• Marsha, Pam, Ashwin, Jeff, & Holly = 38 hours

- **Marsha:**
 - Total Hours: 22 hours

- **Holly:**
 - Total Hours: 10 hours

- **Ashwin:**
 - Total Hours: 2 hours

- **Jeff:**
 - Total Hours: 2 hours

- **Pam:**
 - Total Hours: 2 hours

Overall Total Hours:
- The total combined effort for July was **22 + 10 + 2 + 2 + 2 = 38 hours**.

Special Issues

Cost as of Aug 17, 2024	*Total Cost to Date (direct + indirect):*	3,560.99
	Est Cost at Completion (E$AC):	35,644.25
	Total Budget:	0.00
	Variance (Total Budget minus- E$AC):	-35,644.25
	Reason for Variance: see below	
Projections as of Aug 17, 2024	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	3,560.99
	Variance (Projected minus Actual):	-3,560.99
	Reason for Variance: see below	

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

Other Measures

Project Name	**(TSME25 Team Dynamix (425197)) TSME25 Team Dynamix (425197) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 0.00	**Indirect Budget:** 0.00	**Total Budget:** 0.00
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	July, 2024 (TSME25 Team Dynamix 425197)	Implementing
Risk Level	On Track	
Monthly Updates	No work to report ATM	
Special Issues		
Cost as of Aug 17, 2024	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	19,250.00
	Total Budget:	0.00
	Variance (Total Budget minus- E$AC):	-19,250.00
	Reason for Variance: No charges yet	
Projections as of Aug 17, 2024	*Dollars Projected for Month:*	0.00

		Actual Dollars Used:		0.00

		Variance (Projected minus Actual):		0.00

		Reason for Variance:	See below

Measures

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

Other Measures

		Actual Dollars Used:		0.00

		Variance (Projected minus Actual):		0.00

		Reason for Variance:	See below

		Current Goal:		
	Goal at Completion:			