
Survey Research Operations

Monthly Project Report

Sponsored Data Collection Projects and Development Initiative

June 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)
(HRS 2022 Panel & Baselines) Health and Retirement Study 2022 Main Interviews
(HRS 2024) Health and Retirement Study 2024
(HRS2022-Screening) HRS 2022 - Screening
(IHDS3) India Human Development Survey Wave 3
(LHMS 2023 Fall) Life History Mail Study Fall 2023
(LHMS 2023 Spring) Life History Mail Study Spring 2023
(MI CReSS (Year 3 & 4)) Michigan COVID-19 Recovery Surveillance Cohort Study
(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027
(MTF Early Panel Pilot) Monitoring the Future: A Cohort-Sequential Panel Study of Drug Use, Ages 19-65 - Administrative Supplement #1 (8/10th Grade Panel)
(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027
(NDWS) National Dementia Workforce Study
(PR-PSID) Puerto Rico Panel Study of Income Dynamics
(PSID 2025 OCU) PSID 2025 Online Contact Update
(PSID CDS 2023) PSID Childhood Development Supplement 2023
(PSID TAS 2023) Transition to Adulthood within its Life Course & Intergenerational Family Context
(PSID23) Panel Study of Income Dynamics Core 2023
(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
(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)
(TSME24 QC Systems (483249)) TSME24 QC Systems (483249)
(TSME24 SRO System Maintenance - General (483910)) TSME24 SRO System Maintenance - General (483910)
(TSME24 SSL Autoscheduler interface development (42) TSME24 SSL Autoscheduler interface development (423463)
(TSME24 STrak: Migration to SQL Anywhere V17 () TSME24 STrak: Migration to SQL Anywhere V17 (483227)
(TSME25 SRO System Maintenance - General (483910)) TSME25 SRO System Maintenance - General (483910)

Sponsored Projects Dashboard

Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr	May	Jun
ANES 2024	Sponsored	Implementing	Andrew L Hupp	🟡	🟡	🟡	🟡	🟡	🟡
BFY	Sponsored	Implementing	Piotr Dworak	🟢	🟢	🟢	🟢	🟢	🟢
BHM Library Project	Sponsored	Initiation	Karin Schneider	🟡	🟡	🟢	🟢	🟢	🟢
Care & Help Study	Sponsored	Implementing	Margaret Lee Hudson	🟢	🟢	🟢	🟢	🟢	🟢
CARE Military	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢	🟢	🟢
CARE SALTOS MTEC	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟡	🟢	🟢	🟢
CCS	Sponsored	Initiation	Jeffrey Albrecht Jr	🟡	🟢	🟢	🟢	🟢	🟡
CVFS-SCAN	Sponsored	Initiation	Maureen Joan O'Brien	🟩	🟩	🟩	🟩	🟩	🟢
Health and Well Being in SE MI	Sponsored	Implementing	Barbara Lohr Ward	🔴	🔴	🔴	🔴	🟡	🟡
HRS 2022 Panel & Baselines	Sponsored	Implementing	Evanthia Leissou	🟢	🟡	🟡	🟡	🟡	🟡
HRS 2024	Sponsored	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	🟢	🟢	🟢	🟢	🟢	🟢
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: 4,403,304.00	Indirect Budget: 2,359,915.00	Total Budget: 6,763,219.00
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	<div><div>Pre Production Start: 03/01/2024</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start: 07/10/2024</div><div>DC Start: 08/01/2024</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start: 07/09/2024</div><div>SS Train End:</div><div>DC End: 03/31/2025</div></div>		
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	June, 2024 (ANES 2024)		Implementing	
Risk Level	Some Concerns			
Monthly Updates	<p>Raphael selected the sample. There was a last minute request to add a Spanish flag to the sample file. Raphael included that flag when he delivered the sample file to DataOps.</p> <p>Wen (and Makenna) have moved the reporting forward while Paul was working on HRS and on vacation. Paul has returned and is working with Makenna on reporting before his next vacation in early August.</p> <p>Successfully trained 1-PC, 4-TLs, 1-Travel coordinator, and 19 new interviewers. All interviewers were certified on the first try. 30 on-staff interviewers have been trained. A few remain to be certified due to the CrowdStrike issue on 7/19. There are currently 7 PSUs that don't have an interviewer assignment with 4 travelers without an assignment. The branding of the study has been changed. Rather than using electionstudies.org we will be using anes.isr.umich.edu (what we had originally proposed). There will be two umich emails addresses associated with the project.</p> <p>As of today (7/23) the contract with NORC is in place. We are now able to share data between the organizations.</p> <p>Things are moving quickly on the SRO side and on the MSG side. Rose and Stephanie provided mailing files and Lisa has been busy providing sign-off of on materials as MSG provides them. Things have slipped on the mailing side by a day. There was a flurry of things that needed a quick approval. Upon a secondary QC check a few issues were found. They have all been resolved. Many in TSG are working on systems and instruments for an August 1 launch. We had plenty of work to do to prepare for the launch and were slowed by the CrowdStrike issue and the new content related to the Trump assassination attempt and Biden dropping out of the race. With all of that the Pls would still like an August 1 launch. The entire team is trying their best to meet that deadline. SurveyTrak is much closer to being ready than the web. Web is progressing, but slowly. The basic portal is working, one of the biggest things remaining is the routing between Blaise instruments. That is next up to tackle. We've been overly accommodating, coupled with the recent events, and the way things were specified have slowed us down.</p>			
Special Issues				
Cost as of Jul 16, 2024	Total Cost to Date (direct + indirect):		541,829.55	
	Est Cost at Completion (E\$AC):		6,739,156.35	
	Total Budget:		6,763,219.00	
	Variance (Total Budget minus- E\$AC):		-187,836.35	
	Reason for Variance:		The variance increased this month (~\$50,000) due to the increase in projection in July to get the project launched.	
Projections as of Jul 16, 2024	Dollars Projected for Month:		425,699.29	
	Actual Dollars Used:		226,676.69	
	Variance (Projected minus Actual):		199,022.60	
	Reason for Variance:		Unused projections were pushed forward.	
Measures		Units at Complete	RR	HPI
	Current Goal:	6,636/5,807	55%/88%	
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

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 Investigator/Clients	Dr. Greg Duncan (University of California - Irvine)												
	Dr. Kimberly Noble (Teachers College Columbia University)												
	Dr. Katherine Magnuson (University of Wisconsin)												
Funding Agency	National Institute of Child Health and Human Development (NICHD)												
IRB	HUM#: HUM00137963	Period of Approval:											
Project Team	Project Lead: Piotr Dworak												
	Budget Analyst: 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	<p>University of Michigan Survey Research Center (U-M SRC) is contracted to recruit and interview participants for Baby's First Years -- a longitudinal randomized control trial study.</p> <p>The study's full name, listed on sub-contract documents, is Household Income and Child Development in Early Years. The study will draw on a convenience sample of mothers and their newborns in four US metropolitan areas: New York City; Omaha/Lincoln; New Orleans; and Minneapolis. One or two hospitals, listed in this application, will be used as recruiting sites in each area. The study uses a randomized control trial design in which low-income mothers and newborns will be randomly assigned to a treatment group that receives an unconditional income enhancement -- cash payments of \$333 per month—an amount roughly comparable to a variety of income assistance policies in the U.S. and shown to be associated with meaningful improvements for poor children in prior studies—or to a control condition that receives \$20 per month. In both groups, the payments will be made for the first 40 months of the child's life. To understand the impacts of added income on children's development, researchers will assess treatment/control group differences at ages 1, 2 and 3 on measures of cognitive, language, memory, self-regulation and socio-emotional development. Recruitment is scheduled to start in April of 2018, and each follow-up interview will be conducted 12 months later -- close in time to the child's 1st, 2nd, and 3rd birthday. The feasibility of the approach has been established in a one-year pilot conducted in 2014 at the New York Presbyterian Hospital/Columbia University Medical Center.</p> <p>The Principal Investigators are Dr. Greg Duncan from University of California Irvine (UCI), Dr. Kimberly Noble from Teacher's College Columbia University (TCCU), and Katherine Magnuson from University of Wisconsin-Madison (UWM). UCI (Dr. Duncan) and TCCU (Dr. Noble) are the institutions and signatories funding the U-M SRC subcontract from various sources including the National Institute for Child Health and Human Development (NICHD) and private foundations listed in this application. The study research team also includes co-investigators Lisa Gennetian (New York University), and Hiro Yoshikawa (New York University).</p> <p>SRO will be responsible for four interactions with the selected mothers/infants:</p> <ul style="list-style-type: none"> • Baseline will occur immediately (within 24-48 hours) after birth, in the hospital; • Wave 1 will be a telephone interview with the mother when the child is 12 months old; • Wave 2 will be an in-person interview in the family's home that includes survey, developmental assessment, biomarker collection, and video recorded behavioral interaction when the child is 24 months old; • Wave 3 will be an in-person survey done while the mother and child are visiting a lab for other clinical tests when the child is 36 months old. <p>Each data collection phase/wave will be a full 12 months, with Baseline starting in April 2018:</p> <p>Recruitment/Baseline: 04/01/2018 - 03/31/2019 Wave 1: 04/01/2019 - 03/31/2020 Wave 2: 04/01/2020 - 03/31/2021 Wave 3: 04/01/2021 - 03/31/2022</p>												
SRO Project Period	10/2017 - 12/2020												
Data Col Period	04/2018 - 12/2020												
Security Plan	NA												
Milestones	<table border="0"> <tr> <td>Pre Production Start: 10/01/2017</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start: 01/01/2018</td> </tr> <tr> <td>Staffing Complete: 02/07/2018</td> <td>GIT Start: 03/19/2018</td> </tr> <tr> <td>SS Train Start: 03/20/2018</td> <td>SS Train End: 03/22/2018</td> </tr> <tr> <td>DC Start: 05/07/2018</td> <td>DC End: 06/30/2022</td> </tr> </table>			Pre Production Start: 10/01/2017	Pretest Start:	Pretest End:	Recruitment Start: 01/01/2018	Staffing Complete: 02/07/2018	GIT Start: 03/19/2018	SS Train Start: 03/20/2018	SS Train End: 03/22/2018	DC Start: 05/07/2018	DC End: 06/30/2022
Pre Production Start: 10/01/2017	Pretest Start:												
Pretest End:	Recruitment Start: 01/01/2018												
Staffing Complete: 02/07/2018	GIT Start: 03/19/2018												
SS Train Start: 03/20/2018	SS Train End: 03/22/2018												
DC Start: 05/07/2018	DC End: 06/30/2022												

Other Project Team Members Stephanie Chardoul (SPA)
Piotr Dworak (Lead)
Tony Romanowski (PM)
Daric Thorne (PM/SSA)
Barb Homburg (PM)
Peggy Lavanger (PM)
Jim McClure (DCS)
Jeff Smith (tech lead)
Jim Rodgers (MSMS consultant)
Andrew Hupp (MSMS consultant)
Pam Swanson (MSMS programmer)
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 June, 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: since last Monday 6-17 we invited 161 participants to the lab representing 37% 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 were successfully able to accelerate hand-off of two respondents who indicated they can come to the lab sooner than expected. We are also looking for opportunities for SRO interviewers to work directly with the site teams.

Beyond lab recruitment:

In addition to recruiting respondents, SRC interviewers will be asked to follow up with non-response or hard-to-reach cases sooner and will be asked to complete phone interviews with hard-to-reach cases. To that end, additional SRO interviewers will get access to the BFY Sample Management System developed by University of Wisconsin. Training is planned for September.

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 Jul 23, 2024	Total Cost to Date (direct + indirect):	7,735,272.15
	Est Cost at Completion (E\$AC):	8,709,929.07
	Total Budget:	8,700,361.73
	Variance (Total Budget minus- E\$AC):	-9,567.34
	Reason for Variance:	We added projections to support Age 6 Lab recruitment June 2024 - July 2025 which resulted in overrun. However, we have options to reduce scope in the future after the Age 6 Lab recruitment August 2025 through July 2027.

Projections as of Jul 23, 2024	Dollars Projected for Month:	21,249.63
	Actual Dollars Used:	18,738.07
	Variance (Projected minus Actual):	2,511.56
	Reason for Variance:	Last months underrun resulted from finishing tech development required to kick off the lab recruitment and putting in place all elements related to data transfers to PIs.

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	Deborah Robinson (ISR)		
Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Karin Schneider		
	Budget Analyst:		
	Production Manager:		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	SRO will support the project in the first year by working with you to design the sample. SRO will support the implementation of up to two pilot surveys and the larger national survey of libraries. We will provide consultation on scale development throughout the pilot phase and provide statistical support to finalize the scales and provide a working dataset (with weights to account for the stratified sample design). In total, the SRO period of performance will be approximately 24 months in duration, starting in February of 2023, with data collections for the pilots and national survey taking place over approximately 12 months, starting in late 2023.		
SRO Project Period	02/2023 - 02/2025		
Data Col Period	10/2023 - 09/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name	Developing a Model of Black History Month Programming in Public Libraries		
Sample Mgmt System	Web SMS		
Data Col Tool	Blaise 5		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Not used		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
=====			
Report Period	June, 2024 (BHM Library Project)		Initiation
Risk Level	On Track		
Monthly Updates	Projecting a slight overrun - project management is slightly over, programming hours are still unused. Questionnaire development for the national survey is underway.		
Special Issues	None		
Cost as of Jul 25, 2024	Total Cost to Date (direct + indirect):		0.00
	Est Cost at Completion (E\$AC):		201,219.67
	Total Budget:		197,671.00

Variance (Total Budget minus- E\$AC):				3,548.67
Reason for Variance:				
Projections as of Jul 25, 2024	Dollars Projected for Month:			0.00
	Actual Dollars Used:			0.00
	Variance (Projected minus Actual):			0.00
Reason for Variance:				
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

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

Report Period	June, 2024 (Care & Help Study)		Implementing
Risk Level	On Track		
Monthly Updates	Eight in-person cognitive IWs were completed between June 7-26. 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. The PI is reviewing the interviews and making adjustments to the questions for the 2nd round of interviews, which will take place in July. Funding		

ends in July and no extension is possible.

Special Issues

Cost as of Jul 17, 2024	Total Cost to Date (direct + indirect):	12,796.95
	Est Cost at Completion (E\$AC):	18,635.53
	Total Budget:	42,636.00
	Variance (Total Budget minus- E\$AC):	24,000.47
	Reason for Variance:	Revised work scope; PI took on recruitment, scheduling, and confirming participants. Project ended up being done almost entirely by one person on the SRO side.

Projections as of Jul 17, 2024	Dollars Projected for Month:	7,680.73
	Actual Dollars Used:	3,853.08
	Variance (Projected minus Actual):	3,827.65
	Reason for Variance:	Only completed half of the cognitive IWs in June; remainder pushed to July.

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 McCrear /Dr. Pasquina (Medical College of Wisconsin/Uniformed Services Un)		
	Dr. Thomas McAllister (Indiana University School of Medicine)		
Funding Agency	NCAA and DoD		
IRB	HUM#: 00202691	Period of Approval: 7/23/2021 - open	
Project Team	Project Lead: Donnalee Ann Grey-Farquharson		
	Budget Analyst: David Kellermeyer		
	Production Manager: Barbara Aghababian-Homburg		
	Senior Project Advisor: Barbara Lohr Ward		
	Production Manager 1: Hongyu Johnson		
	Production Manager 2: Keith Liebetreu		
Proposal #	no data		
Description	<p>The project follows academy cadets post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure.</p> <p>This project has an overall SRO involvement period of 13 months, beginning March 2022, with data collection taking place over approximately 12 months starting mid-March 2022. SRO provides consultation, respondent locating activities and data collection for respondents in the uniformed services sample.</p> <p>The goal is to secure participation from approximately 3,200 unique past-CARE study participants. Participants will complete a study assessment once over the 13-month project period. SRO decentralized field interviewers locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct approximately 1,425 telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.</p> <p>The estimate total cost for the overall scope of work is \$1,426,001.00. This includes \$1,131,747.00 direct and \$294,254.00 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders).</p>		
SRO Project Period	02/2022 - 03/2023		
Data Col Period	03/2022 - 08/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Donnalee Grey-Farquharson, Barb Homburg, Hongyu Johnson, James Koopman, Keith Liebetreu, David 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	June, 2024 (CARE Military)	Implementing		
Risk Level	On Track			
Monthly Updates	<div>1. Project Management:<ul style="list-style-type: none">- SRO received and implemented the newly IRB approved text message templates.- SRO continues to coordinate with the PI team on handling international TOA disbursement.- SRO continues to work with the PI team. Datalys and QG to correct sample transferring errors.- SRO Prepared the PI monthly report of June.</div> <div>2. DMSS:<ul style="list-style-type: none">- Data manager continues to manually correct discrepancies in the reports due to miscommunication from QG.</div> <div>3. CARE SMS system:<ul style="list-style-type: none">- SRO received internal transferred sample of 47 cases in June.- SRO discovered that a few key variables were not displaying in the SMS after a recent push to production. We requested that QG prioritize the corrections.- SRO continues to manually correct sample intakes and outputs that are caused by QG without notifications.</div> <div>4. Questionnaire Development<ul style="list-style-type: none">- n/a</div> <div>5. Production<ul style="list-style-type: none">- We are making slow progress on the production. SRO is finding ways to boost productivity.- DCP3 Production stats: As of 06/30/2024 (Total Released samples = 9650)<div>Total Completed lws = 526<div>Web = 524</div>CATI = 2</div>- Locating Team: continued to use social media platforms to find potential respondents. As of 06/30/2024,<ul style="list-style-type: none">- Respondents ever in Tracking =1276- Respondents ever in tracking found Alive = 197- Respondents Found Alive Completed =21</div> <div>6. Hiring and Training<ul style="list-style-type: none">- n/a</div>			
Special Issues				
Cost as of Jun 30, 2024	Total Cost to Date (direct + indirect):	1,684,473.95		
	Est Cost at Completion (E\$AC):	1,684,473.95		
	Total Budget:	1,685,902.70		
	Variance (Total Budget minus- E\$AC):	1,428.75		
	Reason for Variance:	We don't have new funding currently to support the military work. However, military work resumed in April 2024 with civilian funds. **Note: 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 Jun 30, 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 June 2024, we allocated \$52,516.66 to the Military project with the Civilian funds. This brings our cumulative spending on the project to \$122,070.25 from April to June 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	<p>SRO will provide consultation, respondent locating activities and data collection for respondents in the longitudinal Concussion Assessment, Research and Education (CARE) study, with the goal of securing participation from 7,500 unique past-CARE study participants. Participants will complete the same set of study assessments at two time points over the five-year project period. The project follows collegiate athletes post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure. Specifically, SRO decentralized field interviewers will locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.</p> <p>This budget assumes an overall SRO involvement period of approximately 44 months over two waves. Wave 1 SRO involvement will begin in December 2021 with data collection taking place over approximately 12 months, beginning approximately May 2022. Wave 2 SRO involvement will begin in November 2023 with data collection taking place over approximately 12 months starting in May 2024.</p> <p>Currently, the total cost for the overall scope of work (based on the currently committed funding from all sources) is estimated at \$4,685,914. This includes \$3,718,978 direct and \$966,936 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders). As additional sources of funding are identified and those resources committed to SRO survey data collection activities, or inversely if a funder withdraws or reduces their level of funding to the project, the scope of work (e.g., the number of interviews to be collected) will increase or decrease respectively.</p> <p>The estimate of funding contributed by the Department of Defense through the MTEC RFP is \$2,277,689. This includes \$1,807,689 direct costs and \$470,000 indirect costs budgeted at the 26% indirect cost rate. The proposed period of support is September 1, 2021 through August 31, 2025.</p>												
SRO Project Period	10/2021 - 08/2026												
Data Col Period	03/2022 - 02/2026												
Security Plan	NA												
Milestones	<table border="0"> <tr> <td>Pre Production Start:</td><td>Pretest Start:</td></tr> <tr> <td>Pretest End:</td><td>Recruitment Start:</td></tr> <tr> <td>Staffing Complete:</td><td>GIT Start:</td></tr> <tr> <td>SS Train Start:</td><td>SS Train End:</td></tr> <tr> <td>DC Start:</td><td>DC End:</td></tr> </table>			Pre Production Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Complete:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
Pre Production Start:	Pretest Start:												
Pretest End:	Recruitment Start:												
Staffing Complete:	GIT Start:												
SS Train Start:	SS Train End:												
DC Start:	DC End:												
Other Project Team Members	Donnalee Grey-Farquharson, Barb Homburg, Hongyu Johnson, Keith Liebetreu, James Koopman, Ruyi Chen, David Acquaku, 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	June, 2024 (CARE SALTOS MTEC)	Implementing
Risk Level	On Track	
Monthly Updates	<p>1. Project Management:</p> <ul style="list-style-type: none">- SRO received and implemented the newly IRB approved text message templates.- SRO continues to coordinate with the PI team on handling international TOA disbursement.- SRO continues to work with the PI team. Datalys and QG to correct sample transferring errors.- SRO Prepared the PI monthly report of June. <p>2. DMSS:</p> <ul style="list-style-type: none">- Data manager continues to manually correct discrepancies in the reports due to miscommunication from QG. <p>3. CARE SMS system:</p> <ul style="list-style-type: none">- SRO received internal transferred sample of 562 cases in June.- SRO discovered that a few key variables were not displaying in the SMS after a recent push to production. We requested that QG prioritize the corrections.- SRO continues to manually correct sample intakes and outputs that are caused by QG without notifications. <p>4. Questionnaire Development</p> <ul style="list-style-type: none">- n/a <p>5. Production</p> <ul style="list-style-type: none">- We are making slow progress on the production. SRO is finding ways to boost productivity.-DCP3 Production stats: As of 06/30/2024 (Total Released samples = 19767<ul style="list-style-type: none">Total Completed lws = 2035<ul style="list-style-type: none">Web = 2011CATI = 24- Locating Team: continued to use social media platforms to find potential respondents. As of 06/30/2024,<ul style="list-style-type: none">- Respondents ever in Tracking =1276- Respondents ever in tracking found Alive = 916- Respondents Found Alive Completed = 114 <p>6. Hiring and Training</p> <ul style="list-style-type: none">- n/a	
Special Issues		
Cost as of Jun 30, 2024	Total Cost to Date (direct + indirect):	2,634,442.73
	Est Cost at Completion (E\$AC):	4,635,054.20
	Total Budget:	4,685,914.00
	Variance (Total Budget minus- E\$AC):	50,859.80
	Reason for Variance:	<p>The interviewer projections have been very accurate and close to actuals, so the Equipment Use recharge has been updated to reflect the projection for June. Also, some SRC staff hours have been allocated to support a new project starting August 2024 and ending January 2025. Finally, the interviewer rate is expected to change in August 2024, which will impact the underrun amount starting next month.</p> <p>**Note: In June 2024, we allocated \$52,516.66 to the Military project with the Civilian funds. This brings our cumulative spending on the project to \$122,070.25 from April to June 2024. The current spending on Military is reflected the underrun amount in Civilian funds.</p>
Projections as of Jun 30, 2024	Dollars Projected for Month:	156,358.79
	Actual Dollars Used:	146,691.86
	Variance (Projected minus Actual):	9,666.93
	Reason for Variance:	<p>We've observed that the interviewer projections have been very accurate and close to actuals. The Equipment Use recharge has been updated to reflect the projection for June as well. We will also expect the interviewer rate change which should take effect in August.2024. The adjustment will impact the underrun amount and will be made for next month onward.</p> <p>**Note: In June 2024, we allocated \$52,516.66 to the Military project with the Civilian funds. This brings our cumulative spending on the</p>

project to \$122,070.25 from April to June 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 (Some Concerns)		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 560,774.00	Indirect Budget: 84,115.00	Total Budget: 644,889.00
Principal	Hana Lahr (Teachers College, Columbia University)		
Investigator/Clients	Veronica Minaya (Teachers College, Columbia University)		
	Rachel Baker (University of Pennsylvania)		
Funding Agency	Ascendium Education Group		
IRB	HUM#: 00237400		Period of Approval:
Project Team	Project Lead: Jeffrey Albrecht Jr		
	Budget Analyst: Nicole Danielle Doherty		
	Production Manager: Ruth B Philippou		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1: Steven Sonoras		
	Production Manager 2:		
Proposal #	no data		
Description	The CCS seeks to understand factors that influence first year community college students in their program choice. We will survey a selection of students entering a community college for the first time in the fall of 2023 and then follow up with them in the second semester (Spring 2024) and their third semester (Fall 2024). The researchers will recruit 4 community colleges to participate.		
SRO Project Period	01/2023 - 03/2025		
Data Col Period	10/2023 - 11/2024		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 08/01/2024</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start: 10/16/2024</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End: 12/12/2024</div></div>		
Other Project Team Members	Marsha Skoman - Qualtrics Programmer Ed Green - Data Manager Hueichun Peng - Web SMS Programmer		
Other Project Name	How Community College Students Choose Programs of Study		
Sample Mgmt System	Web SMS		
Data Col Tool	Other (Qualtrics)		
Hardware	Desktop		
DE Software	NA		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Cash, prepaid (\$5); Cash, post (\$40); Other (Visa electronic gift cards, Amazon gift codes)		
Payment Method	Imprest Cash Fund from ISR Business Office; Other (VISA eGift cards from HSIP, Amazon gift codes from Teachers Coll)		

Report Period	June, 2024 (CCS)		Initiation
Risk Level	Some Concerns		
Monthly Updates	<div>Budget</div> <div>-Jeffrey worked with Karin to draft a ballpark, which proposals finalized and Jeffrey shared with the PIs. U-M has delivered four ballpark budgets.</div> <div>Project Support</div> <div>-Steven and Jeffrey have resumed weekly meetings.</div> <div>-The tech team is ready to set up for Wave 3.</div>		

IRB

-The PIs submitted their continuing review to the TC IRB in mid-July and are still waiting on a response. Thus, data collection and analyses are currently on hold. We will submit their approval documents to U-M IRB when we have them.

-The PIs are waiting for approval of the continuing review to submit the Wave 3 proposal.

Production Experiments

-The PIs want to send prenotification cards with prepayment to the Stayers and conduct an experiment to compare the effects with emails and text messages.

-The PIs are interested in reminder calling for both the Stayers and Leavers. To limit costs, they have proposed to take the same approach we took in Wave 2, i.e., randomly select half of the remaining samples on Day 25 (Stayers) and Day 32 (Leavers) of production to receive calls.

Special Issues	IRB			
	-The continuing review is holding up the Wave 3 proposal submission, which we planned to submit today. Thus, the project is at risk of delaying Wave 3 data collection.			
	Project Setup			
	-The PIs still have questions about the ballpark budgets, and we need their approval to begin Wave 3 setup, which is planned to begin this month.			
Cost as of Jul 17, 2024	Total Cost to Date (direct + indirect):			580,559.64
	Est Cost at Completion (E\$AC):			753,067.39
	Total Budget:			644,889.00
	Variance (Total Budget minus- E\$AC):			-108,178.39
	Reason for Variance:			The project variance is still due primarily to overspending in Wave 2. The PIs are currently reviewing the Wave 3 ballpark to decide what they can afford and plan to transfer funds when that has been settled. As of last month, there is \$64,329.36 left in the U-M award.
Projections as of Jul 17, 2024	Dollars Projected for Month:			9,300.38
	Actual Dollars Used:			17,882.92
	Variance (Projected minus Actual):			-8,582.54
	Reason for Variance:			This variance is the result of unexpected research and development fees (>\$5,000 higher than projected), which nearly doubled the monthly costs. We also paid another \$1,920 in respondent payments, which we were not expecting since data collection concluded in early May. Jeffrey will confirm that all respondent payments have been processed and paid for, so we can determine if there will be any charges in July.
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures	Goals will be determined once the Wave 3 sample is determined. We do not currently know how many respondents will be Stayers or Leavers and expect those groups to have different response rates.			

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	<p>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.</p> <p>SRO will provide support in the following areas: instrument programming and testing, sample management system programming and testing, and data delivery.</p>		
SRO Project Period	07/2024 - 03/2025		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	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	June, 2024 (CVFS-SCAN)		Initiation
Risk Level	On Track		
Monthly Updates	Technical Updates: Questionnaire: There will be a demographics questionnaire, a battery of cognitive tests, and an Informant questionnaire. The cognitive tests to be used have been decided but the list may be revised.		

Special Issues

Cost as of Jul 17, 2024	Total Cost to Date (direct + indirect):	17,551.60
	Est Cost at Completion (E\$AC):	300,884.02
	Total Budget:	571,548.00
	Variance (Total Budget minus- E\$AC):	270,663.98
	Reason for Variance:	Cost are currently projected through March 2025 but will be extended when SRO's role during data collection is more clearly defined.

Projections as of Jul 17, 2024	Dollars Projected for Month:	33,486.48
	Actual Dollars Used:	17,203.22
	Variance (Projected minus Actual):	16,283.26
	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	<div> <div> Pre Production Start: 12/01/2022 Pretest End: Staffing Complete: 04/10/2023 SS Train Start: 05/18/2023 DC Start: 05/30/2023 </div> <div> Pretest Start: Recruitment Start: 02/01/2023 GIT Start: 05/16/2023 SS Train End: 05/25/2023 DC End: 12/31/2024 </div> </div>		
Other Project Team Members	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	June, 2024 (Health and Well Being in SE MI)		Implementing
Risk Level	Some Concerns		
Monthly Updates	<p>On July 1st we paused screening for D-AMP new sample lines as we had spawned enough to reach the 200 target.</p> <p>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. As of July 26 and including all data back to July 2nd, we are at 59% who agree to participate.</p>		

Convenience sample intake started on July 2nd as well and to date have processed 63 lines.

Training was completed in June for those screeners that had trained in April and continue to do well. Cost were split between D-AMP and Healthy Brain.

An additional training is confirmed in September for 7-10 bilingual IWERS and will split costs as well but primarily for Healthy Brain.

Current Staffing for both SRS and D-AMP/HB projects:
31 main IWERS of which 11 are bilingual
12 screener only IWERS

Priority:
- 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.

INF interviewing is currently at a 76.6% RR of those that have identified an INF. There are currently 60 D-AMP completes that have not identified INF lines

Special Issues

Cost as of Jul 23, 2024	Total Cost to Date (direct + indirect):	3,175,774.86
	Est Cost at Completion (E\$AC):	3,692,139.28
	Total Budget:	3,758,127.00
	Variance (Total Budget minus- E\$AC):	65,987.72
	Reason for Variance:	Expected to be close but will know more with the Healthy Brain approval and understanding of how many Rs will actually say yes to HB questions

Projections as of Jul 23, 2024	Dollars Projected for Month:	317,411.37
	Actual Dollars Used:	66,461.49
	Variance (Projected minus Actual):	250,949.88
	Reason for Variance:	Both direct and indirect cost came in under. No hosting charge, under in Respondent payment, and salary dollars Backed out D-AMP hours and moved to Healthy Brain project Sharing costs with Healthy Brain project

Measures		Units at Complete	RR	HPI
	Current Goal:	200/400/200 design		
	Goal at Completion:	200/400/200 design		
	Current Actual:	211/15/62	39% scnr; 28% main	
	Estimate at Complete:			
	Variance:			

Other Measures

Actuals are as of 7/25/2024:
211 new sample cases (goal 200), 62 panel cases (goal 200), 15 convenience sample cases (goal 400)
Healthy Brain further research - 59% Yes / 41% No

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

Report Period	June, 2024 (HRS 2022 Panel & Baselines)		Implementing
Risk Level	Some Concerns		
Monthly Updates	<p>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.</p> <p>2. Baseline production remained steady the past month and the % of baseline attempted each week in staffed areas continues to increase. Interviewers continue to work less hours than projected for baselines - field managers are working with interviewers who are not meeting expectations.</p> <p>3. Interviewer training wrapped up June 7 with 68 staff. Discussions and search for location for a fall training began. New hires spent the first few weeks focusing on screening in order to generate baseline sample. As new baseline sample is generated, the field staff's shift will prioritize working baseline sample over screening.</p> <p>4. Baseline endgame sample was released to interviewers who needed sample waiting the release 7 screener sample. Release 7 screener precontact mailing was mailed on 6/26. 719 of the release 7 lines were released in six PSUs due to low sample and a planned travel trip at that time.</p> <p>5. Of the 7,447 baseline cases that have ever been flagged priority, 1,663 (22%) have completed an interview. Newly generated baselines from screening continue to be flagged on a weekly basis.</p> <p>6. 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. 7,324 baseline respondents have been mailed the end game letter, of which 697 (9%) have completed the interview. New cases are flagged for end game weekly.</p> <p>7. 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 end of July/early August.</p> <p>8. SurveyTrak and Blaise programming started for sub-sampling the minority older cohorts (MOC) in screener releases 7+.</p> <p>*The "measures" table reflects Panel and Baseline combined as of 7/6/24. Breakdown of Panel and Baseline counts and rates in Other Measures Field.</p>		
Special Issues	<ul style="list-style-type: none"> - Did not meet the Panel response rate goal of 74% even with the additional five months of field time and responsive design strategies due to interviewer count and balancing effort with new cohort screening/baseline iws. - Slow progress with baseline interviewing. - Multiple Blaise issues that have impacted STrak and MSMS throughout data collection. - 2022 New Cohort data collection projected to end in May 2025 in order to meet goal. - Competing project team demands with HRS 2022 and HRS 2024 simultaneous data collections as well as multiple trainings planned for both in spring and fall 2024. - High field staff attrition rate. Burden on staff with additional recruitment and training efforts while managing production. 		
Cost as of Jul 17, 2024	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 Jul 17, 2024	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
	Current Goal:	18,756	53%
	Goal at Completion:	22,215	44%
	Current Actual:	18,757	53%
	Estimate at Complete:	20,912	42%
	Variance:	1,303	2%
Other Measures	<p>Panel: Revised RR Goal: 68% (original goal 74%), Final RR: 68% (Panel end date 9/2/23)</p> <p>2022 Baselines generated from screener: Goal: 6,003 iws; Current: 3,819 iws from 13,399 baselines spawned from screener as of 7/11/24. Current RR: 28.8%%</p> <p>2019 EGenX baselines: Goal RR: 70%, Current RR: 74.4% (497 iws)</p>		

Project Name	(HRS 2024) Health and Retirement Study 2024 (On Track)		
Project Mode	Primary: Mixed Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	Direct Budget: 15,792,284.00	Indirect Budget: 5,685,224.00	Total Budget: 21,477,508.00
Principal Investigator/Clients	David Weir (ISR-SRC)		
Funding Agency			
IRB	HUM#: HUM000611128		Period of Approval: 6/7/2023-6/6/2024
Project Team	Project Lead: Evanthia Leissou		
	Budget Analyst: Richard Warren Krause		
	Production Manager: Andrea Sims		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Derek Dubuque		
	Production Manager 2: Jennifer C Arrieta		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.		
SRO Project Period	05/2023 - 08/2025		
Data Col Period	05/2024 - 05/2025		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 05/15/2023</div><div>Pretest End: 02/18/2024</div><div>Staffing Complete: 03/15/2024</div><div>SS Train Start: 04/23/2024</div><div>DC Start: 05/13/2024</div></div> <div><div>Pretest Start: 01/29/2024</div><div>Recruitment Start: 12/19/2023</div><div>GIT Start: 04/22/2024</div><div>SS Train End: 04/29/2024</div><div>DC End: 05/31/2025</div></div>		
Other Project Team Members	Alex Warju (Production Manager), Gary Hein (Project Manager), Erin McSpadden (Project Manager), Daniah Buageila (Project Manager), Janet McBride (Project Assistant), Paul Burton (Stats/Sampling), Vanessa Clarke (Project Assistant), Jeannie Baker (Project Manager), Melissa Luker (Project Assistant), Anthony Romanowski (Project Manager), Megan Hromco (Project Assistant), Austin De Spirito (Project Assistant), Cindy Huang (Budget Analyst)		
	Tech Team: Karl Dinkelmann, Jeff Smith, Jim Rodgers, Laura Yoder, Marsha Skoman, Ashwin Dey, Pam Swanson, David Bolt, Deb Wilson, Jennie Williams, Rose Zybdel, Stephanie Windisch, Holly Ackerman, Shane Empie, Kelly Chatain, Brianna Sabol, Kelly Lieske, Asia Paige		
Other Project Name	HRS 2024 Panel		
Sample Mgmt System	SurveyTrak; MSMS		
Data Col Tool	Blaise 5; SAQ		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Blaise 5 Coding Application); External vendor (DataForce)		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	NA		
Payment Type	Check, prepaid (\$100 (Interview)); Check, post (\$50 (WBD), \$20 (SAQ), \$20 (SSA)); Cash, post (\$20 (SAQ))		
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office		

Report Period	June, 2024 (HRS 2024)		Implementing
Risk Level	On Track		
Monthly Updates	-HRS 2024 activities continued with cost projections, technical specifications, technical development, testing,		

precontact mailing preparations, and pre-pay check processing.

- Testing was on hold for Web Panel (web self iw and MSMS). Start of Web Panel TBD pending a fix to a new Blaise bug in 5.14 reported to CBS in June (Note: a potential fix was delivered to SRO in early July).
- 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)
- HRS Data Processing Team delivered three additional preload update files with fixes for 20,442 non-final cases. For non-final sample active in the field, interviewers again had to reschedule appointments and delay scheduling new appointments to ensure the preload was fixed and released back to the field.
- Production has been going well, despite the preload updates. Interviewers have exceeded hours and interview goals 3 out of the 4 weeks in June. The one week where they were below goal was due to the need to reschedule appointments & not schedule new appointments for the preload updates.

Measures in table below are as of 7/6/24.

Special Issues	-Project team resource concerns for HRS 2024 and HRS 2022 with simultaneous production periods and multiple trainings. -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 Jul 17, 2024	Total Cost to Date (direct + indirect):		4,141,963.82	
	Est Cost at Completion (E\$AC):		21,033,812.81	
	Total Budget:		21,477,508.00	
	Variance (Total Budget minus- E\$AC):		443,695.19	
	Reason for Variance:	Projections in CRS are for pre-production and pretest data collection. Will update the total budget now that the 6 year renewal proposal funds are awarded (received in Mid-May). Variance since last month is due to delay in the new award. We have been instructed to continue to charge the pre-production account codes until the new award comes in which was mid-May. The team is working to move pre-production costs from February 1, 2024 and on to the new account codes set up mid-May and will work on adding future projections to CRS.		
Projections as of Jul 17, 2024	Dollars Projected for Month:		2,052,012.54	
	Actual Dollars Used:		533,580.35	
	Variance (Projected minus Actual):		1,518,432.19	
	Reason for Variance:	Variance primarily due to April and May 2024 CAPI/CATI billings that had not previously billed correctly, hosting and travel costs had not hit as projected, and unused iwer hours due to a week delay to start of data collection.		
Measures		Units at Complete	RR	HPI
	Current Goal:	1,629	7.8%	8.0
	Goal at Completion:	17,341	70%	9.3
	Current Actual:	1,959	9.3%	6.8
	Estimate at Complete:	17,341	70%	9.3
	Variance:	0	0	0
Other Measures				

Project Name	(HRS2022-Screening) HRS 2022 - Screening (On Track)		
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 21,264,149.00	Indirect Budget: 7,655,093.00	Total Budget: 28,919,242.00
Principal	David Weir (SRC)		
Investigator/Clients	Helen Levy (SRC)		
	Ken Langa (SRC)		
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Evanthia Leissou		
	Budget Analyst: Richard Warren Krause		
	Production Manager:		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Andrew L Hupp		
	Production Manager 2: Theresa Camelo		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample.		
SRO Project Period	02/2021 - 08/2024		
Data Col Period	03/2022 - 06/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: 04/19/2022 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	SurveyTrak; MSMS; Other ((Blaise) Case Management App (CMA))		
Data Col Tool	Blaise 5		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Blaise 5 web instrument); N/A		
QC Recording Tool	Camtasia; N/A		
Incentive	Yes, R; Yes, INF		
Administration	SRO Group		
Payment Type	Check, post; Cash, prepaid (\$2); Cash, post		
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office		

Report Period	June, 2024 (HRS2022-Screening)		Implementing
Risk Level	On Track		
Monthly Updates	<p>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. Any non-finalized endgame cases (from Reps 1-4) that were re-released were recently re-finalized.</p> <p>We have released 11,086 cases to the endgame protocol. 1,060 cases (9.6%) of cases have completed a screener. 95 cases (9.0%) completed via the web, and 965 (91.0%) of cases completed in-person. Flagging of endgame cases will resume on 7/29. There are ~1,800 cases that will be flagged for endgame.</p>		

Replicates 3 and 4 have been sorted. Paul will be doing QC checks on those. Sorting on replicate 5 is underway. One replicate (6) remains to be sorted.

Special Issues

Cost as of Jul 17, 2024	Total Cost to Date (direct + indirect):	25,267,717.29
	Est Cost at Completion (E\$AC):	35,186,092.20
	Total Budget:	28,919,242.00
	Variance (Total Budget minus- E\$AC):	-6,266,850.20
	Reason for Variance:	Projections have been entered through March 2025 (projection of when we would meet the baseline production goal).
Projections as of Jul 17, 2024	Dollars Projected for Month:	1,439,005.37
	Actual Dollars Used:	658,328.19
	Variance (Projected minus Actual):	780,677.18
	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:	5,013/3,940	44.5%	2.86
	Estimate at Complete:			
	Variance:			

Other Measures

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

Payment Method	Other (TBD)			

Report Period	June, 2024 (IHDS3)		Implementing	
Risk Level	On Track			
Monthly Updates	Worked mostly on processing A14 Community project that is wrapping up soon and automating generating and releasing migrant preloads every Friday. We continue to finish up data recoveries, still have about 20 left to go.			
Special Issues	Wave 3 funding balance ended at -\$18,833.61 direct and indirect costs (-\$12,072.53 Direct))			
Cost as of Jul 17, 2024	Total Cost to Date (direct + indirect):		118,959.47	
	Est Cost at Completion (E\$AC):		134,128.82	
	Total Budget:		134,259.00	
	Variance (Total Budget minus- E\$AC):		130.18	
	Reason for Variance:		TOTAL Budget is \$134,259.00 . Not carrying forward certain amount of hours due additional funds that may be needed during closeout.	
Projections as of Jul 17, 2024	Dollars Projected for Month:		7,053.66	
	Actual Dollars Used:		5,591.24	
	Variance (Projected minus Actual):		1,462.42	
	Reason for Variance:		Overall variance will minimal.	
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

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

Report Period	June, 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 Jul 17, 2024	Total Cost to Date (direct + indirect):	332,647.72		
	Est Cost at Completion (E\$AC):	260,567.72		
	Total Budget:	505,359.00		
	Variance (Total Budget minus- E\$AC):	244,791.28		
	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 Jul 17, 2024	Dollars Projected for Month:	0.00		
	Actual Dollars Used:	54.62		
	Variance (Projected minus Actual):	-54.62		
	Reason for Variance:	One half-hour 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	<p>The HRS Life History Mail Survey (LHMS) is part of the Health and Retirement Study. The goal of LHMS is to collect retrospective life histories of HRS participants to address multidisciplinary need for information about events, residential location, and education over the entire life course. Information like this allows researchers to understand how individuals' pasts shape their health and economic situations today.</p> <p>A paper questionnaire will be mailed to a sample of approximately 2,288 HRS Respondents. From this sample, approximately 1,242 completed surveys are expected (54% response rate). For the reminder protocol, 495 respondents have been designated to receive a reminder by postcard. The remaining 1,793 respondents will receive reminders by phone to complete the questionnaire. When a respondent is reached by phone, SRO will attempt to complete the 60-minute interview by telephone. Thank you postcards will be mailed to respondents who return a completed questionnaire.</p>		
SRO Project Period	04/2023 - 12/2023		
Data Col Period	06/2023 - 09/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 04/01/2023 Pretest End: Staffing Complete: SS Train Start: 07/11/2023 DC Start: 06/20/2023 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: 07/11/2023 DC End: 09/26/2023 </div> </div>		
Other Project Team Members	Gary Hein: Project Lead Cindy Tsao: Budget Analyst Vanessa Clarke: Project Assistant Carolyn Viera Martinez: Coding Lead		
Other Project Name	LHMS Spring		
Sample Mgmt System	SMS		
Data Col Tool	SAQ; Other (Blaise SMS)		
Hardware	Desktop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Check, prepaid (\$25)		
Payment Method	Check through STRak RPay System		
=====			
Report Period	June, 2024 (LHMS 2023 Spring)		Implementing
Risk Level	On Track		
Monthly Updates	June Activities and Notable Events for Spring and Fall:		

- 1- SAQs received and logged
- 2- Progress reports prepared and delivered to PIs
- 3- SAQs shipped to DataForce for scanning
- 4- Scanned SAQs and Fall data deliveries delivered to HRS
- 5- Crosswalk for data delivery prepared by project managers
- 6- Thank you post cards generated and mailed
- 7- SRO team members attended monthly check-in meeting with HRS Staff
- 8- Monthly budget projection meeting with financial analyst
- 9- Coding performed by HRS coding staff

Special Issues	Finance wants to bill current/future fall activities to the spring shortcode			
Cost as of Jul 22, 2024	Total Cost to Date (direct + indirect):	261,730.71		
	Est Cost at Completion (E\$AC):	241,672.41		
	Total Budget:	457,922.00		
	Variance (Total Budget minus- E\$AC):	216,249.59		
	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 Jul 22, 2024	Dollars Projected for Month:	-31,353.67		
	Actual Dollars Used:	3,012.95		
	Variance (Projected minus Actual):	-34,366.62		
	Reason for Variance:	Coding hours overprojected. Projected check voids did not hit.		
Measures		Units at Complete	RR	HPI
	Current Goal:	1053	54%	N/A
	Goal at Completion:	1053	54%	N/A
	Current Actual:	358	18%	N/A
	Estimate at Complete:	358	18%	N/A
	Variance:	695	36%	N/A
Other Measures	N/A			

Project Name	(MI CReSS (Year 3 & 4)) Michigan COVID-19 Recovery Surveillance Cohort Study (On Track)		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 792,443.00	Indirect Budget: 206,037.00	Total Budget: 998,480.00
Principal Investigator/Clients	Nancy Fleischer (U-M School of Public Health (SPH))		
Funding Agency	MDHHS - Releases 1 - 8		
IRB	HUM#: HUM00234617	Period of Approval: 6/15/2023-6/14/2028	
Project Team	Project Lead: Timothy Prand		
	Budget Analyst: William Lokers		
	Production Manager: Lisa J Carn		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Narine Verdiyan		
	Production Manager 2:		
Proposal #	no data		
Description	<p>MI CReSS is a partnership between the University of Michigan School of Public Health (SPH) and the Michigan Department of Health and Human Services. It is a public health surveillance study to learn about Michiganders' experiences with COVID-19 using a representative sample of confirmed cases within the state. Using survey data, they plan to document sociodemographic inequities in COVID-19 testing, treatment, and recovery.</p> <p>SRO's involvement includes the administration of a Follow-up survey for respondents that completed a Baseline survey with the SPH team. Based on the sample information provided, we will be re-contacting approximately 3,995 respondents who have already completed (or are estimated) to complete the Baseline survey to administer the Follow-up survey.</p> <p>The Follow-up survey is estimated to be 45 minutes in length, and Respondents will be encouraged to complete the survey by web. However, SRO Interviewers will contact non-responders and conduct the interview over the telephone if the Respondents do not want to complete the survey on the web. HUM00181068 - Year 3 IRB Exempt - Budget:\$841,375 Total used:\$649,836 HUM00234617 - Year 4 - IRB approved - Budget:\$477,681</p>		
SRO Project Period	08/2021 - 09/2023		
Data Col Period	01/2022 - 07/2023		
Security Plan	NA		
Milestones	<div><div><div>Pre Production Start:</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start: 07/28/2023</div><div>DC Start: 09/14/2023</div></div><div><div>Pretest Start:</div><div>Recruitment Start: 06/01/2023</div><div>GIT Start:</div><div>SS Train End: 07/29/2023</div><div>DC End: 02/28/2025</div></div></div>		
Other Project Team Members	Bill Lokers: Financial Analyst Megan Hromco: Production Assistant Hueichun Peng: Technical Lead / WSMS db Programmer Peter Sparks: CAI Programmer (Blaise 5) Cheng Zhou: Web Component, ADT, Reports LihShwu Ke: DBA Architecture & Data Security Sarah Broumand: Data Manager Deb Wilson: Help Desk		
Other Project Name			
Sample Mgmt System	Web SMS		
Data Col Tool	Blaise 5		
Hardware	Laptop; Desktop		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Other (HSIP VISA Gift Card)		
Payment Method	NA		

Report Period	June, 2024 (MI CReSS (Year 3 & 4))			Implementing
Risk Level	On Track			
Monthly Updates	<p>Cohort 2</p> <ul style="list-style-type: none">- Release 1-8 is complete- Releases 9-16 launched 4/23/2024 for English and Spanish, 5/15 for Arabic<ul style="list-style-type: none">- Releases 9 - 15 are now in field- Still working on a solution for our Arabic IWER need. We only have 6 sample lines left for all of Releases 9-16- 2 Bilingual IWERs have agreed to attempt to contact Arabic cases when things are slower.- ORIO, Locating sent and email to a non-confirmed email which resulted in a complete by the wrong/incorrect R. As part of the survey, date of birth and the address are exposed as part of the confirmation/update processes. The ORIO was submitted and acknowledges by the IRB and have taken steps to prevent this from happening again.- ToA Issue, as part of our endgame process we increase the ToA from \$25 to \$50 and is handled 1 sample release at a time. When Release 9 hit that transition, all releases ToAs were updated to \$50 instead of just REL 9... This resulted in 1 R seeing the \$50 ToA that should not have. ToAs where changed back within a couple of hours.- Arabic ToA issue, The Arabic IWER did not follow the ToA dollar amount within the survey and instead thought we had upped the ToA to \$50 and presented that amount to the R. When the R received their ToA they were upset that they only got the \$25 ToA and called the IWER directly. We honored the \$50 ToA. <p>Continuing to investigate minor bugs which don't impact the survey but does require some manual manipulation to get resultcodes/statuses correct. We don't believe this is a Blaise upgrade issue but we did not see any prior to the upgrade. Peter is on it!</p> <p>Expecting \$150,000 underrun through Sept 30 and will need a carryforward to Year 5 which will finish out the MICReSS project.</p>			
Special Issues				
Cost as of Jul 19, 2024	Total Cost to Date (direct + indirect):			610,510.25
	Est Cost at Completion (E\$AC):			844,077.44
	Total Budget:			998,480.00
	Variance (Total Budget minus- E\$AC):			154,402.56
	Reason for Variance:			Carry Forward from FO1 included and fewer hours being put on the project.
Projections as of Jul 19, 2024	Dollars Projected for Month:			72,440.97
	Actual Dollars Used:			71,849.25
	Variance (Projected minus Actual):			591.72
	Reason for Variance:			Pretty close to what was projected.
Measures		Units at Complete	RR	HPI
	Current Goal:	3000	67%	3
	Goal at Completion:	3650	80%	6
	Current Actual:	2904	66%	6.31
	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. MoCA is currently .71 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	<p>Since 1975 the MTF survey has measured drug and alcohol use and related attitudes among adolescent students nationwide. A nationally representative sample of survey participants report their drug use behaviors across three time periods: lifetime, past year, and past month. The survey is funded by the NIDA, a component of the National Institutes of Health (NIH), and conducted by the University of Michigan.</p> <p>It is based on two interconnected series of surveys using nationally representative samples:</p> <p>(a) self-administered annual in-school surveys of 8th, 10th, and 12th graders (~45,000) in 400 schools. Proctors (SRO interviewers) coordinate and administer the data collection in schools (either FTF or remotely without visiting the schools).</p> <p>(b) panels of high school graduates aged 19-30, 35, 40,45, 50, 55, and 60 (now primarily surveyed by web). Panel members aged 19-30 are invited to participate every other year/asked to complete a web survey and the older sample members are sent questionnaires (mail and web) at five-year interval. The MTF panel study has three parts - early in the year a newsletter is mailed to panel members. If the newsletter is returned (undelivered) locating effort targets these panel members and others who have not participated for X years. The web panel launches (web) in spring and in around June a telephone non-response effort begins for those invited to participate. The panel members are recruited from the 12th graders who participate in the base year study.</p> <p>Press releases and published results can be found here.. http://www.monitoringthefuture.org/</p>												
SRO Project Period	04/2022 - 03/2027												
Data Col Period	04/2022 - 03/2027												
Security Plan	Yes												
Milestones	<table border="0"> <tr> <td>Pre Production Start:</td><td>Pretest Start:</td></tr> <tr> <td>Pretest End:</td><td>Recruitment Start:</td></tr> <tr> <td>Staffing Complete:</td><td>GIT Start:</td></tr> <tr> <td>SS Train Start:</td><td>SS Train End:</td></tr> <tr> <td>DC Start:</td><td>DC End:</td></tr> </table>			Pre Production Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Complete:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
Pre Production Start:	Pretest Start:												
Pretest End:	Recruitment Start:												
Staffing Complete:	GIT Start:												
SS Train Start:	SS Train End:												
DC Start:	DC End:												
Other Project Team Members	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	June, 2024 (MTF Base Year 2022_27)	Implementing
Risk Level	On Track	
Monthly Updates	<p>June 2024</p> <p>The final school survey visit took place on 5/6.</p> <p>286 schools participated, 101 8th grade, 97 10th grade and 88 12th grade schools.</p> <p>The MTF SRC team passed 313 schools to SRO for us to;</p> <ul style="list-style-type: none"> -proceed with the survey protocol, -assist in gathering the basic details which are included on the School Information Form (SIF) or -help make contact with hard to reach schools. <p>Of these schools, 47 did not participate and were coded as a 9001 (REF). A list of these schools and reason (when known) was provided in the weekly Production Report sent by Peggy.</p> <p>Across the 286 participating schools, 26,287 students completed the survey, an overall response rate of 84%. As always, response varied by grade, the younger students were more likely to respond (88%) than 12th graders (78%).</p> <p>A similar number of schools (n=11) were completed using the remote protocol as last year (in these schools the Study Proctor does not proctor the survey in-person).</p> <p>Across all schools, the majority opted for students to complete the survey during a scheduled class in their classrooms (70%). In the remaining schools, students gathered in a hall or gym to complete the survey at one time all together.</p> <p>The average number of hours to complete a school survey this year is 21.1hrs (very close to the average in 2023). Interviewers travelled 63,564 miles (average of 222 per school) and 2,208 hours were charged by interviewers for travelling. The majority of schools required an overnight trip and 57 required air travel.</p> <p>This year, there were some changes to the survey protocol which made staff assignments more complicated (FTF visits to schools and the use of 'log-in' cards to collect contact details from 12th grade students).</p> <p>The major change was the changing data collection software. Many thanks again to Hueichun for leading the team and working so hard to make this a seamless change.</p> <p>Since the final schools survey visit was made, Ed has delivered the final data, the last few Study Proctors have completed a debrief form and almost all interviewers have returned their equipment. We will have a brief pause before a few interviewers (around 4/5) will begin assisting with school recruitment by visiting schools in-person (from early September). Peggy and I will be reviewing feedback from interviewers and adding to our list of 'Suggestions for MTF 2025'. A conference call, which focused just on the new protocol to collect contact details from 12th grade students, took place earlier in May. The MTF-SRC team are using this feedback to adjust the protocol for next year.</p> <p>Thanks to the full MTF team for their hard work during this data collection period.</p>	

Special Issues		
Cost as of Jul 17, 2024	Total Cost to Date (direct + indirect):	2,829,306.70
	Est Cost at Completion (E\$AC):	7,174,153.10
	Total Budget:	9,778,060.00
	Variance (Total Budget minus- E\$AC):	2,603,906.90
	Reason for Variance:	<p>Projections for Funding period 2022 – 2027 (latest client report has been uploaded to MPR)</p> <p>Current projections result in an under spend for the five year grant period. The projected costs are based on completion of 325 schools in years 2024 – 2027 (we were projecting costs for 400 schools) and all in-person. Illume charges have been removed from projections from 2024 onwards. A portion of the hours for work involved in transitioning MTF surveys to Qualtrics are being charged to the Illume recharge account.</p> <p>Primary reason for the under spend and plans for SRO funding: Projections for the five year period are based on current scope of work and the adapted protocol (introduced in 2021). The budget prepared for the proposal was based on the pre-pandemic design. The adapted protocol brings savings in the following categories: interviewer hours, travel, shipping and staff time (specifically hours required for loading and preparing tablets for shipping). For the past few years the number of schools recruited and passed to SRO has been lower than the number used for this budget (n=390).</p> <p>In response, MTF (SRC) have reduced our funding for the first two years. We have received (from MTF) \$1,843,080 (Y1) and \$1,143,890 (Y2) a total reduction of \$815,581. Going forward, the current plan is to fund Year 3 and 4 based on the budgeted amount - if there is significant underspending MTF will reduce SRO's Year 5 award. SRO Finance group feels that we should continue to report/monitor using the original budgeted amount because this is not an official reduction in budget. We are keeping the client (via Nick Prieur) informed of actual and projected spend through a monthly cost report.</p>

Projections as of Jul 17, 2024	Dollars Projected for Month:	119,750.73
	Actual Dollars Used:	71,896.21
	Variance (Projected minus Actual):	47,854.52
	Reason for Variance:	Over projected interviewer hours (some survey administrations were cancelled at the last moment) and 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	<p>After the MTF research team delivers survey specifications for each of the 2 waves of data collection, SRO will program the instruments and conduct integration testing with the sample management system. When testing is complete, SRO will launch the 2024 and 2025 Web survey data collections with an estimated sample size of 600 cases per wave of data collection. The Principal Investigator will identify the sample and deliver contact information including e-mail address to SRO. SRO will conduct reminder calling with an estimated 300 cases for each wave of data collection.</p> <p>This budget assumes an overall SRO involvement period of 20 months commencing in March 2024 with the data collections taking place during a 4-month period (for each wave), beginning in May 2024 (for Wave 1) and May 2025 (for Wave 2).</p>		
SRO Project Period	12/2023 - 12/2025		
Data Col Period	04/2024 - 08/2025		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Rebecca Gatward (SPA), Donnalee Grey-Farquharson (Lead), Hueichun Peng, Shaowei Sun, Hongyu Johnson, Brad Goodwin, Edward Green		
Other Project Name			
Sample Mgmt System	Web SMS		
Data Col Tool	Other (Qualtrics)		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	ISR Group (MTF Staff)		
Payment Type	Other (Tango Card)		
Payment Method	Other (Post (by MTF Staff))		

Report Period	June, 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 06/30/2024:

- Total completes=25

- Received 14 parental consents (1 in progress of survey, 13 are not started yet)

Special Issues

Cost as of Jun 30, 2024	Total Cost to Date (direct + indirect):	76,288.41
	Est Cost at Completion (E\$AC):	287,700.33
	Total Budget:	288,529.00
	Variance (Total Budget minus- E\$AC):	828.67
	Reason for Variance:	The variance is a result of all SRO MTF team members with a Survey Specialist or Survey Director title have received a market rate salary adjustment, retroactive to February 2024. This has a huge impact on the projections/budget.

Projections as of Jun 30, 2024	Dollars Projected for Month:	15,367.88
	Actual Dollars Used:	12,831.99
	Variance (Projected minus Actual):	2,535.89
	Reason for Variance:	All key staff used less hours than we projected in June.

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

Other Measures

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

- WebSMS running for production
- RCLS set up for NR production

3. Data Collection

-Production Stats: as of 006/30/2024: Accumulated Total=7801 (RR=40.18%)

4. Winter Location

- N/A

5. NR Production/Calling

- Continue to call identified respondents

6. RLM

- identified an technical issue and working to resolve it.

Special Issues

Cost as of Jun 30, 2024	Total Cost to Date (direct + indirect):	1,669,445.99
	Est Cost at Completion (E\$AC):	4,046,273.85
	Total Budget:	3,895,217.00
	Variance (Total Budget minus- E\$AC):	-151,056.85
	Reason for Variance:	The total project amount includes MTF Web Illume, 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 huge impact on the projections and budget. In addition, we are expecting the interviewer rate to change in August 2024. We will make adjustments in July and onwards.
Projections as of Jun 30, 2024	Dollars Projected for Month:	104,893.83
	Actual Dollars Used:	118,390.14
	Variance (Projected minus Actual):	-13,496.31
	Reason for Variance:	The negative variance was caused by a lot higher Survey Tech (I & II) hours used during the NR calling project production period. The overrun amount will be adjusted 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	(NDWS) National Dementia Workforce Study (On Track)		
Project Mode	Primary: Not Available		
Project Type	Sponsored Projects		
Budget	Direct Budget: 4,327,548.00	Indirect Budget: 2,423,425.00	Total Budget: 6,750,973.00
Principal	Donovan Maust (Michigan Medicine)		
Investigator/Clients	Joanne Spetz (University of California, San Francisco)		
	James Wagner (University of Michigan - Survey Research Center)		
Funding Agency	NIA		
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Margaret Lee Hudson		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Piotr Dworak		
	Production Manager 2: Lisa S Holland		
Proposal #	no data		
Description	<p>The National Dementia Workforce Study (NDWS) will be launched by a national team of experts in clinical care of persons living with dementia, survey research, and health workforce research. The goal of the NDWS data infrastructure is to allow researchers and policymakers to ask and answer scientific questions to help build the workforce of clinicians and other professional care providers required by the growing population of persons living with dementia in the U.S. The Core of NDWS will be four surveys that reflect key elements of the professional dementia care workforce in the U.S.: Community Clinicians, Nursing Home Staff, Home Care Staff, and Assisted Living Staff. In addition to these surveys, the NDWS team will develop a variety of additional data sources that can be linked with the surveys in order to maximize the scientific potential of the surveys. The project's activities will be conducted through five Cores: 1) Administrative; 2) Screening and Survey Instrument; 3) Administrative Data Transfer, Masking, Access, and Ethics; 4) Data Collection, Linkages, Cleaning, and Sharing; and 5) Research Studies. The overall aims are to: 1) Launch a family of four nationally representative professional dementia workforce surveys covering the key care delivery settings in the U.S.; 2) Through the National Dementia Workforce Study, build a data infrastructure surrounding the dementia workforce surveys that allows researchers to generate critical insights into the professional dementia care workforce and associated outcomes for PLWD; and 3) Develop and expand the community of researchers focused on the professional dementia care workforce overall and that use the National Dementia Workforce Study data infrastructure.</p> <p>SRO's work is associate with Cores 2 and 4.</p>		
SRO Project Period	10/2023 - 09/2028		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	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	June, 2024 (NDWS)		Planning

Risk Level	On Track			
Monthly Updates	<p>June activities:</p> <ul style="list-style-type: none"> * Major focus of pre-production activities included working with our data collection partners (RTI & DLH) and NDWS staff to prepare protocols and materials for the data collection IRB submission. * Work continued on programming specifications for the 7 survey instruments, as well as codebooks, and a survey crosswalk to manage the content across the 7 instruments, which have overlap. * Continued discussion on the best way to send survey invitations from research partners, whether we wanted to (operational considerations) and could (technically) send from umich.edu or if sending from @rti.org and @dlhcorp.com was adequate. * Continued working through rostering and consent processes for different portions of the data collection (e.g., facility agreement to participate, administrator & staff consent to participate) and how it will be documented. * Began conversations with our data collection partners about reporting & dashboards. * Preparing an SRO instrument testing plan and team for when the 7 surveys are ready for testing. We need to be ready for a quick turnaround on feedback. 			
Special Issues				
Cost as of Jul 17, 2024	Total Cost to Date (direct + indirect):	421,446.78		
	Est Cost at Completion (E\$AC):	4,170,760.60		
	Total Budget:	6,750,973.00		
	Variance (Total Budget minus- E\$AC):	2,580,212.40		
	Reason for Variance:			
Projections as of Jul 17, 2024	Dollars Projected for Month:	75,206.90		
	Actual Dollars Used:	50,020.04		
	Variance (Projected minus Actual):	25,186.86		
	Reason for Variance:	Had assumed we would begin testing in June		
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 Investigator/Clients	Narayan Sastry (University of Michigan) Elizabeth Fussel (Brown University)		
Funding Agency	NICHD, with supplemental funding being sought from NIA		
IRB	HUM#: HUM00197300		Period of Approval: 4/5/2022-3/22/24
Project Team	Project Lead: Camila Kendall		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Camila Kendall		
	Production Manager 2:		
Proposal #	no data		
Description	SRO will work with the PIs and a local survey firm in Puerto Rico, Estudios Técnicos (ETI), to develop a sample frame, sample design, questionnaire and data collection protocols for both pilot data collection (in 2022) and baseline data collection (in 2023). DMSS will provide assistance with sample design and implementation, responsive design, panel maintenance issues, and creation of sample weights. SRO will update the PSID-21 Spanish instrument for use specifically in PR. SRO will assist with the preparation of training materials for Listing training, Pretest and Main Data collection and will travel to PR to be on-site for these trainings. SRO will define reports for production and quality control monitoring that will be programmed through the SurveyTrak system, and train the research team on using these reports. All data will be collected by ETI's interviewers in PR and will be encrypted and transmitted daily via SurveyTrak to a secure SRC server. SRO will also assist with data processing.		
SRO Project Period	01/2022 - 12/2023		
Data Col Period			
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 10/01/2021 Pretest End: 03/11/2024 Staffing Complete: SS Train Start: 01/31/2024 DC Start:</div><div>Pretest Start: 02/05/2024 Recruitment Start: GIT Start: 01/30/2024 SS Train End: 02/02/2024 DC End:</div></div>		
Other Project Team Members	Shonda Kruger-Ndiaye & Camila Kendall -- Co-Project Leads Raphael Nishimura -- Sampling Tech Team: Marsha Skoman (Tech Lead & STrak Programmer), Jude Purillo (Lead Blaise Programmer), Kelly Lieske (Programming Support), Valyn Dall (Data Manager), Jennie Williams (Data Management Support), Emmanuel Ellis (Help Desk), Cheng Zhou (Database setup), Lihshwu Ke (Database set up) Spanish Testing and Project Support: Liliana Grueber, Alondra Ortiz-Ortiz, Mabel Hernandez Duran (PSID Temp)		
Other Project Name			
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop		
DE Software	N/A		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	Other (ETI (Puerto Rican Survey Firm))		
Payment Type	Check, post (Varies by study phase); Cash, post (Varies by study phase)		
Payment Method	Other (Via ETI Systems)		

Report Period	June, 2024 (PR-PSID)		Implementing
Risk Level	Some Concerns		
Monthly Updates	SRO met with PIs and DMSS resource to discuss PR-PSID pretest data extraction and data processing. Data processing for PR-PSID will not follow the typical PSID Core model -- it will be simplified. SRO was able to		

successfully extract the data into the Blaise relational databases, and will begin reorganizing the data next month.

PIs are pursuing additional funding from Americorp (via contract funding). SRO explained that the contract funding mechanism would add significant complexity to the SRO budget. SRO is also exploring whether funding would come with FISMA requirements.

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 Jul 24, 2024	Total Cost to Date (direct + indirect):	604,104.56		
	Est Cost at Completion (E\$AC):	1,488,533.96		
	Total Budget:	1,292,585.00		
	Variance (Total Budget minus- E\$AC):	-195,948.96		
	Reason for Variance:	Projected cost to complete decreased by ~\$2.7K between May & June reports.		
Projections as of Jul 24, 2024	Dollars Projected for Month:	2,032.63		
	Actual Dollars Used:	-647.86		
	Variance (Projected minus Actual):	2,680.49		
	Reason for Variance:	Variance due to fringe rate fluctuation		
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 (Some Concerns)		
Project Mode	Primary: Web	Secondary: Mail	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 52,360.00	Indirect Budget: 29,326.00	Total Budget: 81,686.00
Principal	Katherine McGonagle (PSID)		
Investigator/Clients	Noura Insolera (PSID)		
Funding Agency	NSF		
IRB	HUM#: HUM00062417		Period of Approval:
Project Team	Project Lead: Camila Kendall Budget Analyst: Ivanna Iavorska-Em Production Manager: Senior Project Advisor: Stephanie A Chardoul Production Manager 1: Production Manager 2:		
Proposal #	no data		
Description	SRO will update the Blaise and MSMS specifications from 2022 and program and test a Blaise 5 web instrument and web portal with authentication that allows PSID and TAS respondents to confirm or update their contact information via an online survey. SRO will provide PSID authenticated links so that they can merge QR codes that will be embedded in a mailing sent to the respondents. SRO will also program and send the respondents up to three email reminders with an authenticated link. This project is under the PSID Core IRB.		
SRO Project Period	04/2024 - 05/2025		
Data Col Period	07/2024 - 12/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Shonda Kruger-Ndiaye -- PSID Suite Lead Rachel 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	June, 2024 (PSID 2025 OCU)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Blaise and MSMS programming began in June. The first MSMS integration project was built using system files from		

last wave, which was problematic. The project needed to set up a second integration project with the correct files, before config testing could begin. The config test for the integration project took longer than expected -- there was an issue pulling the session data back into MSMS. It took approximately 4 days to resolve the issues with the config test.

Integration testing began on 6/12 -- Minimal Blaise and MSMS bugs were identified and quickly resolved. Integrating testing data was delivered to PSID on 6/21. PSID requested minimal changes (relabeling some variables), which will be implemented in the Prod Data test environment.

IRB amendment was prepared and submitted.

Data manager has needed more support than projected. Added projections for DM support in July.

Special Issues	Projecting an overrun -- Data management and MSMS programming actuals are higher than projections.		
Cost as of Jul 23, 2024	Total Cost to Date (direct + indirect):		40,558.74
	Est Cost at Completion (E\$AC):		87,031.07
	Total Budget:		81,686.00
	Variance (Total Budget minus- E\$AC):		-5,345.07
	Reason for Variance:	Actuals for MSMS programming and Data Management have been higher than projected.	
Projections as of Jul 23, 2024	Dollars Projected for Month:		17,397.55
	Actual Dollars Used:		25,731.05
	Variance (Projected minus Actual):		-8,333.50
	Reason for Variance:	MSMS set up programming took significantly longer than expected. MSMS programming charges from April and May did not hit the project until June (shortcodes were not available until May).	

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

Report Period	June, 2024 (PSID CDS 2023)		Implementing
Risk Level	On Track		
Monthly Updates	<p>CDS data collection in in week 27 of the planned 36 to finish Phase1. Phase 2 (Saliva collection) starts in September 2024.</p> <p>Our current goals and progress: -- CS: completed 2,349, 73%. We need 200 CS completed in the next 5 weeks to achieve min acceptable 80% RR. -- PCG: completed 1931 of the planned 2162 (assuming 80% CS and 95% PCG completion). PCG interviews are</p>		

going well with 81% of active sample completed same as 81% in 2021 (comparison with 2019 more difficult due to changes in protocol).

-- Adolescent: completed 909 of the planned 1014 (assuming 80% CS, 95% PCG, and 85% PCG consent rate). Adolescent completion this wave benefits from the new Web mode -- 72% 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%)

-- 42 interviewers

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

-- Expect more consolidation in July and the Fall (ANES and HRS)

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:

Phase 2 preparations continue with the study protocol finalized and moving forward with programming and implementation. Recent activities include ST specking, finalizing staff list, and sample release schedule. The scope includes staffing 20 - 25 OS interviewers, mail-out/back saliva protocol with 30% of families visited to aid cooperation.

Timeline

Advance notification 9-13--Modes TBD

Training 9-17 (4 - 8 hours)

First saliva kits (incl. advance token) sent 9-20

Tech development

No instrument

SurveyTrak & Weblog

Mapping application

Maybe Qualtrics and Tango ??

OLIVE for Ver/no plans for Eval

Special Issues

Cost as of Jul 19, 2024	Total Cost to Date (direct + indirect):	2,747,707.29
	Est Cost at Completion (E\$AC):	5,946,407.90
	Total Budget:	7,280,680.57
	Variance (Total Budget minus- E\$AC):	1,334,272.67
	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 Jul 19, 2024	Dollars Projected for Month:	630,551.00
	Actual Dollars Used:	353,687.54
	Variance (Projected minus Actual):	276,863.46
	Reason for Variance:	Moving forward, monthly projections have been adjusted to be more accurate and stop monthly underruns.

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

Other Measures

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

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

Report Period	June, 2024 (PSID TAS 2023)		Closing
Risk Level	On Track		
Monthly Updates	June Project Updates Data collection: - Data collection officially ended on 6/1 with the web portal closing on 6/3. The project ended with 2,449 total iws,		

which includes 2407 Web and 42 CATI. Two additional iws occurred during sample closeout. These interviews were done over the phone due to the web portal being closed.

-TAS ended with a successful 89% response rate, which includes 41 accepted partial iws..

Technical

- MSMS May update (June 4) impacted TAS close out due to the inability to move cases to a Review state. By the time the issue was identified and resolved on June 18 causing a delay in finalizing TAS cases by adding 7 days to this process.

- Project team is focusing efforts on project close out being completed the first week of July.

Management:

A variety of debriefs occurred with a focus on 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 due by Sept 2024.

Special Issues

Cost as of Jul 19, 2024	Total Cost to Date (direct + indirect):	1,328,236.95
	Est Cost at Completion (E\$AC):	1,371,875.43
	Total Budget:	1,457,428.00
	Variance (Total Budget minus- E\$AC):	85,552.57
	Reason for Variance:	The biggest driver of this reduction is due to fewer hours needed across all tech, management, and survey tech categories.
Projections as of Jul 19, 2024	Dollars Projected for Month:	79,899.07
	Actual Dollars Used:	79,204.22
	Variance (Projected minus Actual):	694.85
	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 Investigator/Clients	Katherine McGonagle (UM-SRC-PSID)		
	Narayan Sastry (UM-SRC-PSID)		
	Esther Friedman (UM-SRC-PSID)		
Funding Agency			
IRB	HUM#: HUM00062417		Period of Approval: 3/22/22-3/21/24
Project Team	Project Lead: Rachel Anne Orlowski		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager: Stacy Quisenberry		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Daric Thorne		
	Production Manager 2: Shonda R Kruger-Ndiaye		
Proposal #	no data		
Description	<p>The Panel Study of Income Dynamics (PSID--also known to Respondents as the Family Economics Study or FES) is a longitudinal survey of several thousand individuals and their families, carried out since 1968 and conducted every two years. The sample is comprised of respondents from the 4,800 original families as well as new (immigrant) sample added in 1997/1999 and 2017/2019. The total 2023 sample size will be approx. 11,200, with approx. 9,650 completed interviews expected. Most of the information collected is about family composition and changes (marriages, divorces, births, deaths, people moving in and out); income sources and amounts; employment and pensions; and wealth. There are also questions about housing; education; vehicles; health; fertility; COVID-19; and money spent on food, healthcare, and school. The main focus is on how these family composition and financial factors interact with each other and how they change over time. The survey will be administered via web and telephone, with the expectation that more surveys will be completed via web than telephone (which will be a first for the study).</p> <p>During the 2023 wave, saliva samples will be collected for the first time on PSID Core. The Core interview must be completed to be eligible for saliva collection. Saliva sample participants that are eligible for collection during Core are adults related to Child Development Supplement (CDS) children but do not live with them. Interviewers will be trained on both the interview and saliva collection protocols. Both data collection efforts will be managed in the same MSMS project.</p> <p>The 2023 waves of CDS and the Transition into Adulthood (TAS) will follow PSID Core data collection. CDS and TAS eligibility is dependent upon completion of PSID Core.</p>		
SRO Project Period	03/2022 - 09/2024		
Data Col Period	03/2023 - 04/2024		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 03/01/2022</div><div>Pretest Start: 10/11/2022</div><div>Pretest End: 10/31/2022</div><div>Recruitment Start: 09/19/2022</div><div>Staffing Complete: 04/21/2023</div><div>GIT Start: 06/05/2023</div><div>SS Train Start: 03/08/2023</div><div>SS Train End: 06/11/2023</div><div>DC Start: 03/23/2023</div><div>DC End: 04/30/2024</div></div>		
Other Project Team Members	TSG Tech Leads - Jim Rodgers, Jeff Smith, & Karl Dinkelmann; Data Manager - Brad Goodwin & Ed Green; 68ID Site Programmer - Ashwin Dey; Blaise Programmer - Jude Perillo; MSMS Programmers - Pam Swanson & Darnell Christian; Self Scheduler Programmer - Peter Sparks; Help Desk - David Bolt, Andrea Pierce, & Deb Wilson; Production Tech Support - Sarah Broumand; Testing Coordinator - Camila Kendall; SSL Production Manager: Carolyn Vieira-Martinez; DCO Production Manager: Lorraine Bird; Saliva Project Manager: Mark Nathin; Project/Production Support - Saujanya Acharya, Mat Luna, Janet McBride, & Xiomara Lorenzo-Guerra; Reporting, Mapping, & Sample Assignment - Ji Qi & Wen Chang		
Other Project Name	PSID Core 2023		
Sample Mgmt System	MSMS		
Data Col Tool	Blaise 5		
Hardware	Laptop; [UM cell] Phone		
DE Software	N/A		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, Other (Locator, Proxy)		

Administration	ISR Group (PSID)			
Payment Type	Check, post (Varies); Cash, post (Varies); Other (electronic, post--JP Morgan)			
Payment Method	Check through other system (PSID will handle check & e-payment via RAPS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (PSID will handle check & e-payment via RAPS)			

Report Period	June, 2024 (PSID23)		Implementing	
Risk Level	On Track			
Monthly Updates	Summary of June 2024 Activities			
	Interview On 6/5, redelivered FPS data for 4 CATI SIDs with corrupted audit trail data.			
	Saliva Collection Finalized coding of family units and participants that were released for data collection. Preparing to close the project.			
Special Issues	Saliva data collection (including FTF visits) started later than originally planned. Saliva RR short of budgeted target (44%).			
Cost as of Jun 20, 2024	Total Cost to Date (direct + indirect):		5,640,967.61	
	Est Cost at Completion (E\$AC):		5,673,701.46	
	Total Budget:		6,235,802.00	
	Variance (Total Budget minus- E\$AC):		562,100.54	
	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 Jun 20, 2024	Dollars Projected for Month:		26,874.35	
	Actual Dollars Used:		16,636.41	
	Variance (Projected minus Actual):		10,237.94	
	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 Investigator/Clients	Tom Crossley (UM-SRC-PSID) 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	<p>The Panel Study of Income Dynamics (PSID--also known to Respondents as the Family Economics Study or FES) is a longitudinal survey of several thousand individuals and their families, carried out since 1968 and conducted every two years. The sample is comprised of respondents from the 4,800 original families as well as new (immigrant) sample added in 1997/1999 and 2017/2019. The total 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.</p> <p>Talk about ancillary studies here.</p> <p>The 2023 waves of CDS and the Transition into Adulthood (TAS) will follow PSID Core data collection. CDS and TAS eligibility is dependent upon completion of PSID Core.</p>		
SRO Project Period	03/2024 - 09/2026		
Data Col Period	03/2025 - 03/2025		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 03/01/2024</div><div>Pretest End: 10/06/2024</div><div>Staffing Complete:</div><div>SS Train Start: 02/17/2025</div><div>DC Start: 03/03/2025</div></div> <div><div>Pretest Start: 09/16/2024</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End: 02/28/2025</div><div>DC End: 12/31/2025</div></div>		
Other Project Team Members	TSG Tech Leads - Jim Rodgers, Jeff Smith, & Karl Dinkelmann; Data Manager - Brad Goodwin & Ed Green; 68ID Site Programmer - Ashwin Dey; Blaise Programmer - Jude Perillo; MSMS Programmers - Pam Swanson & Darnell Christian; 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	June, 2024 (PSID25)		Implementing	
Risk Level	On Track			
Monthly Updates	<p>Summary of June 2024 Activities</p> <p>PI Updates/Decisions: Discussed alternative approaches to capturing isVisited data, instead of relying on FPS data. Confirmed intervention plan, including not conducting any experiments in PSID25.</p> <p>Technical development: MSMS - Reviewed in detail Sample Attributes Definitions (SAD) file to determine which Blaise pulls we truly needed on the sample line. It was determined that most pulls listed were expected and needed, though some discussion is ongoing about what needs to be in DCA versus 68-ID site, and what impacts on DCA loading that might have (if any). Reviewed and made significant improvements to spec'd interface based on field feedback to Sampleline Grid in DCA. User management features to be delayed until late July/early August release. DCA testing was delayed due to project being delayed - the project expected to be released in early July.</p> <p>Blaise - Development continued, including discussions and spec'ing RE: implementation of re-authorization processes for R's re-entering the web instrument. Working through updates given by PSID study staff, most specifications were delivered.</p> <p>Preload builder: Testing continued, with refinement of the preload builder questionnaire and processes for loading sample lines in Pretest Prod. Added splitoffs for the first time in Preload Builder to test changes to the splitoff interview during Pretest.</p> <p>68-ID - Delays due to HRS priorities prevented 68-ID development work until June 19th.</p> <p>Training: Preload Builder Training is scheduled for August 5 and 6th. The agenda is finalized. The recruitment questionnaire and welcome memo are on track to be finalized and mailed to interviewers on 7/31. Slides and scripts are mostly finalized, requiring only small edits and review. The Pretest Training is scheduled for September 9th, 10th, 12th, and 13th, with a break scheduled for Wednesday, Sept 11th. Training content and the agenda have been finalized. There will be ~12 on-staffers at this Zoom training. The team is working to update training materials including slides, scripts, 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.</p>			
Special Issues				
Cost as of Jul 23, 2024	Total Cost to Date (direct + indirect):			255,091.07
	Est Cost at Completion (E\$AC):			8,215,896.98
	Total Budget:			7,805,285.00
	Variance (Total Budget minus- E\$AC):			-410,611.98
	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 Jul 23, 2024	Dollars Projected for Month:			118,285.29
	Actual Dollars Used:			99,614.61
	Variance (Projected minus Actual):			18,670.68
	Reason for Variance:			Minor variance from what was projected across salary categories. 68ID Site and MSMS Int Project experienced some delays in implementation, deferring hours, most of which we expect to appear in July.
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:	9,994	89%	4.73
	Current Actual:			
	Estimate at Complete:	9,994	89%	4.73
	Variance:			
Other Measures	'Current goals' will be populated as production goals are finalized. 'Estimated' goals at completion will be updated as production is underway.			

Project Name	(SAND COVID Follow-Up) Study of Adolescent to Adult Neural Development (SAND) COVID-19 Follow-up Study (On Track)		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 141,021.00	Indirect Budget: 78,973.00	Total Budget: 219,994.00
Principal	Colter Mitchell (U-M, SRC)		
Investigator/Clients	Helen Meier (U-M, SRC)		
Funding Agency			
IRB	HUM#: 00246902		Period of Approval:
Project Team	Project Lead: Elizabeth Ohryn Budget Analyst: Dean E Stevens Production Manager: Lisa J Carn Senior Project Advisor: Shonda R Kruger-Ndiaye Production Manager 1: Narine Verdiyan Production Manager 2:		
Proposal #	no data		
Description	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 Accurant.		
SRO Project Period	05/2024 - 11/2024		
Data Col Period	08/2024 - 10/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 05/01/2024 Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 10/30/2024 </div> </div>		
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	June, 2024 (SAND COVID Follow-Up)	Planning
Risk Level	On Track	
Monthly Updates	June 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 July production launch. Data Management SRO has had an iterative process with the PI team to spec out and obtain the correct respondent information for both the young adults (YA) and their primary caregiver (PCG) that will be invited to complete the web interview. Technical Using a prior SRO project as the base of programming, Blaise SMS is being specced out for non-response calling that will include text messaging using QR codes.	

Management Team

Final edits to respondent communications took place. This includes adjustments to email and text language along with adding authenticated links to the project's web survey in Qualtrics. The PI team will then submit the final communications, data management plan, and final questionnaire to the IRB by the end of June.

Once programmed by the PI team, the SRO team will have an opportunity to review the survey in Qualtrics.

Data Collection

Staffing of interviewers and team leaders is now completed. The project has eight interviewers and four team leaders assigned to SAND. Team leader training will take place the first full week of July with interviewer training on Aug 1.

Special Issues	Final sample estimates and data collection measures are TBD.			
Cost as of Jul 17, 2024	Total Cost to Date (direct + indirect):	9,776.89		
	Est Cost at Completion (E\$AC):	163,803.86		
	Total Budget:	219,994.00		
	Variance (Total Budget minus- E\$AC):	56,190.14		
	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 Jul 17, 2024	Dollars Projected for Month:	23,525.76		
	Actual Dollars Used:	9,776.89		
	Variance (Projected minus Actual):	13,748.87		
	Reason for Variance:	Hours for all categories 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	<p>The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations.</p> <p>The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 600 interviews.</p>		
SRO Project Period	01/2024 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: 01/02/2024 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 06/30/2024 </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	SMS		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; Desktop; [UM cell] Phone		
DE Software	NA		
QC Recording Tool	DRI-CXM		
Incentive	Not used		
Administration	N/A		
Payment Type	N/A		
Payment Method	N/A		
=====			
Report Period	June, 2024 (SCA 2024)		Initiation
Risk Level	On Track		
Monthly Updates	<p>SCA June 2024 began as scheduled on Wednesday 5/22/2024, and ended on Monday 6/24/2024.</p> <p>SCA completed 601 interviews in June 2024 (321/180/100), 1 interview above the goal of 600 (320/180/100).</p> <p>The cumulative HPI for the month was 3.42, which represents a slight decrease (-0.13) from the May 2024 study month.</p>		

Special Issues

Cost as of Jul 17, 2024	Total Cost to Date (direct + indirect):	671,649.80
	Est Cost at Completion (E\$AC):	684,168.55
	Total Budget:	696,383.00
	Variance (Total Budget minus- E\$AC):	12,214.45
	Reason for Variance:	Lower than projected hours and costs for interviewers in June was the primary factor for the underrun increase. Further, the decrease in the study month HPI was an ancillary factor in lowering cost.

Projections as of Jul 17, 2024	Dollars Projected for Month:	108,726.18
	Actual Dollars Used:	88,991.80
	Variance (Projected minus Actual):	19,734.38
	Reason for Variance:	We do not anticipate substantial costs going forward. Projections include closing out tasks and remaining projections include costs directly attributable to hours incurred in June.

Measures		Units at Complete	RR	HPI
	Current Goal:	600		3.2
	Goal at Completion:	600		3.2
	Current Actual:	601		3.42
	Estimate at Complete:	601		3.42
	Variance:	+1		+0.22

Other Measures

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

Report Period	June, 2024 (SRS 2021)		Implementing
Risk Level	On Track		
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. On June 23rd we paused screening as we had enough main line spawned to reach the 1100 goal. In July, we assessed the budget and re-opened screening as we believe we have the budget to get to 1200 new sample		

completes along with the 244 panel cases. We also pushed back the projected field end date to the end of September. We may be able to get more than the 1200 but set a conservative estimate to begin with.

Priority now is completing the panel and then we will assess if we can't add any additional new sample completes and extend field through October.

Current Staffing for SRS/D-AMP/HB projects:
31 main IWERS of which 11 are bilingual
12 screener only IWERS

Special Issues				
Cost as of Jul 23, 2024	Total Cost to Date (direct + indirect):			4,171,609.55
	Est Cost at Completion (E\$AC):			5,797,338.76
	Total Budget:			5,876,610.11
	Variance (Total Budget minus- E\$AC):			79,271.35
	Reason for Variance:			We expect the project to use the full funding amount.
Projections as of Jul 23, 2024	Dollars Projected for Month:			472,141.10
	Actual Dollars Used:			258,722.11
	Variance (Projected minus Actual):			213,418.99
	Reason for Variance:			Significantly fewer hours spent on the project in June. Screening was paused at the end of June (23rd)
Measures		Units at Complete	RR	HPI
	Current Goal:	1200 new/244 panel		
	Goal at Completion:	1200 new, 244 panel		
	Current Actual:	1134 new /80 panel	32% scr/48% main	
	Estimate at Complete:			
	Variance:			
Other Measures		Production is shown as of 7/25/2024.		

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 Investigator/Clients	James Wagner (University of Michigan) Robert Ursano (Uniformed Services University of the Health Scienc) Murray Stein / Ron Kessler (University of California San Diego / Harvard)		
Funding Agency	Department of Defense		
IRB	HUM#: HUM00180765	Period of Approval: 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	<p>This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.</p> <p>For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data.</p> <p>To date, we have completed 2 waves of STARRS-LS interviewing. During Wave 1, we attempted to contact 50,000 individuals and completed approximately 14,500 full interviews. All Wave 1 participants that completed a full Wave 1 interview were asked to participate in Wave 2. Waves 3 and 4, which are covered in this application, will include the full STARRS-LS Wave 2 sample, regardless of whether they completed the interview.</p> <p>In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys).</p>		
SRO Project Period	05/2020 - 02/2025		
Data Col Period	11/2022 - 04/2024		
Security Plan	Yes		
Milestones	<div> <div> Pre Production Start: 04/01/2024 Pretest End: Staffing Complete: SS Train Start: DC Start: 11/11/2024 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 05/03/2026 </div> </div>		
Other Project Team Members	Ryan Yoder, Keith Liebetreu, Becky Loomis, Steven Sonoras, Andrew Piskorowski, Rose Zdybel, Ji Qi, Makenna Harrison, Lamont Manley, Lisa Van Havermaet, Stephanie Windisch, Youhong Liu, Peter Sparks. Pam Swanson, Jim Rodgers, Marcus Blough, Nick Hinkle-DeGroot, Pete Westhead		
Other Project Name	STARRS-LS Continuation		
Sample Mgmt System	MSMS		
Data Col Tool	Blaise 5		
Hardware	Laptop; Desktop; [UM cell] Phone		

DE Software	N/A
QC Recording Tool	Other (Blaise CARI)
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post (\$50-\$100)
Payment Method	Check through other system (MSMS)
<hr/>	
Report Period	June, 2024 (STARRS-LS Waves 3, 4, 5) Implementing
Risk Level	On Track
Monthly Updates	<p>Project Management and Planning:</p> <ul style="list-style-type: none"> ? We sent weekly production updates to the PIs, and reported on progress on the call with the Army/M&RA. ? Meredith created the agenda/notes and facilitated the weekly meeting with the STARRS project managers. ? In the June 11 PI meeting, we discussed implementing an incentive experiment in the first few replicates of Wave 5, offering the current amounts to a random half and the proposed higher amounts to the other random half. ? Budget/Funding: <ul style="list-style-type: none"> o We continued steps to convert the Wave 5 ballpark into a formal proposal package. ? IRB: <ul style="list-style-type: none"> o The Wave 5 IRB protocol was reviewed in the June 20 full board meeting. They sent a small number of contingencies that we will address before they can issue an approval. o We submitted an ORIO for recontacting a Wave 3 withdrawal case in Wave 4. ? While working on Wave 4 sample reconciliation, we discovered that a respondent who asked to withdraw from the study in Wave 3 was recontacted in Wave 4. This respondent had completed the Wave 3 survey, then cited wanting to withdraw because the survey caused them distress. A technical error led to them being recontacted in Wave 4. In an interesting turn of events, this respondent completed the Wave 4 survey. However, we should not have recontacted this person in the first place, so reported it as an ORIO. <p>Enclave and User Support:</p> <ul style="list-style-type: none"> ? Annual IA security review: Vulnerability scans and updated documents were sent to M&RA/AAG; U-M received the signed information assurance letter for the 2023 review from AAG on July 1. ? Annual NDI Data Request: U-M completed preparation of the submission file 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: <ul style="list-style-type: none"> o DUA (for COVID data sharing) with Jordan Smoller at Mass General Brigham: ? We awaited finalization of the DUA ? We learned that approved Army-approved administrative data will no longer be sent (the demographics will come from survey data). County and state will still be provided, so the enhanced system security/access language that we added to the DUA and transfer memo are still merited. ? Biomarker group request for assistance: <ul style="list-style-type: none"> o We continued to assist Dr. Stein with a request for genomic and survey variables to be sent to a Yale researcher. <p>Public Use Data:</p> <ul style="list-style-type: none"> ? Biosample flags, administrative variables: <ul style="list-style-type: none"> o On June 28, ICPSR reported that the release of the biosample flags and admin data will be delayed a couple of weeks in part due to ICPSR transitioning to a new system for generating study codebooks. At this time, our external release date is still projected for July 2024. ? Inventory document: <ul style="list-style-type: none"> 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. o The inventory document timeline has followed biosample flags/admin by a month, so while our internal target for completion will be later by a couple of weeks, the external release is still August 2024 at this time. ? We awaited decisions from the Army/GSC on producing the genetic and bioassay files for public use and placing data in the NIH National Data Archive and Public use release for GWAS. <p>Wave 4 Post-Production:</p> <ul style="list-style-type: none"> ? Preliminary Wave 4 survey data was loaded to the Enclave on June 7. ? We continued work on sample reconciliation which will allow us to produce the Wave 4 final outcomes dataset and sample flowchart. ? The team continued work on occupation/industry and open-ended response coding. <p>Wave 5 Pre-Production:</p> <ul style="list-style-type: none"> ? The bulk of programming specifications for the Wave 5 survey were completed and survey programming began. ? Significant portions of technical specifications for the sample management system were completed and programming began. ? The team continued work on Wave 5 sample prep. ? We worked to define QC systems, and procedures for interview verification and quality control. ? We continued work on report development including reports for monitoring the respondent incentive experiment to take place in the first few replicates of Wave 5.
Special Issues	No changes this month to the areas of risk and mitigation strategies.

Cost as of May 31, 2024	Total Cost to Date (direct + indirect):	11,203,296.07
	Est Cost at Completion (E\$AC):	13,667,784.05
	Total Budget:	13,730,116.00
	Variance (Total Budget minus- E\$AC):	62,331.95
	Reason for Variance:	General underspending across salary groups.

Projections as of May 31, 2024	Dollars Projected for Month:	259,273.99
	Actual Dollars Used:	184,192.80
	Variance (Projected minus Actual):	75,081.19











































Reason for Variance: \$22K of the underspending was the new server that was projected in May, but the JE to move that cost from contingency to STARRS will not be processed until June. The rest of the underspending was in management, main data collection and post collection processing salary – a bolus of coding hours projected for May have not hit yet, so were moved forward.

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
<i>TSME24 DCO System Support (483248)</i>	Initiatives	Implementing	Vivienne Y Outlaw						
<i>TSME24 MSMS performance work (425267)</i>	Initiatives	Implementing	Jim Rodgers						
<i>TSME24 QC Systems (483249)</i>	Initiatives	Implementing	Sarah Elisa Broumand						
<i>TSME24 SRO System Maintenance - General (483910)</i>	Initiatives	Implementing	Jeffrey L Smith						
<i>TSME24 SSL Autoscheduler interface development (42)</i>	Initiatives	Implementing	Debbie Seale						
<i>TSME24 STrak: Migration to SQL Anywhere V17 (</i>	Initiatives	Initiation	Lawrence Daher						
<i>TSME25 SRO System Maintenance - General (483910)</i>	Initiatives	Implementing	Jeffrey L Smith						

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

Report Period	June, 2024 (TSME24 DCO System		Implementing
Risk Level	Some Concerns		
Monthly Updates	- Worked with Sarah, Grant and Vivienne on the protocol of PIPPA import (from ODS) to Fred - Worked on the logic of Fred functions when PIPPA scores are imported - Investigated the Team Dynamics (TDX) technical environment - Investigated the TDX API library and workflow Web Service to check the feasibility - Batch upload iwers' photos into Fred		
Special Issues			
Cost as of Jul 17, 2024	Total Cost to Date (direct + indirect):		46,426.58
	Est Cost at Completion (E\$AC):		46,426.58
	Total Budget:		35,000.00
	Variance (Total Budget minus- E\$AC):		-11,426.58
	Reason for Variance: support of DCO systems including implementation of new applicant		

Projections as of Jul 17, 2024		Dollars Projected for Month:		4,217.29
		Actual Dollars Used:		6,922.73
		Variance (Projected minus Actual):		2,705.44
Reason for Variance:				
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

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

Report Period	June, 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):	52,084.14	
	Est Cost at Completion (E\$AC):	96,410.75	
	Total Budget:	100,000.00	
	Variance (Total Budget minus- E\$AC):	3,589.25	
	Reason for Variance:	Capacity may not be available	
Projections as of	Dollars Projected for Month:	14,775.54	
	Actual Dollars Used:	10,106.73	

Variance (Projected minus Actual):

4,668.81

Reason for Variance:

Less capacity available than expected

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

Other Measures

Project Name	(TSME24 QC Systems (483249)) TSME24 QC Systems (483249) (On Track)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 49,500.00	Indirect Budget: 0.00	Total Budget: 49,500.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Sarah Elisa Broumand		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	To be defined		
SRO Project Period	07/2023 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
=====			
Report Period	June, 2024 (TSME24 QC Systems)		Implementing
Risk Level	On Track		
Monthly Updates	Due to the early finish of this task, team started working on finishing items that were backlogged such as adding the new Evaluator Observations to the training module in Olive. On the report front, worked on report changes requested by QC Implementation team.		
Special Issues			
Cost as of Jul 17, 2024	Total Cost to Date (direct + indirect):		45,704.51
	Est Cost at Completion (E\$AC):		45,704.51
	Total Budget:		49,500.00
	Variance (Total Budget minus- E\$AC):		3,795.49
	Reason for Variance:		Programmer did not take as much time as he had estimated.
Projections as of Jul 17, 2024	Dollars Projected for Month:		9,734.70

Actual Dollars Used: 8,995.24

Variance (Projected minus Actual): 739.46

Reason for Variance: Programmer did not take as much time as he had estimated.

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

Other Measures

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

Report Period	June, 2024 (TSME24 SRO System		Implementing
Risk Level	On Track		
Monthly Updates	<ul style="list-style-type: none"> Follow-up on ST Admin features poll Regression test plan template for SurveyTrak Generic data dictionary for new DB schema Updates on SurveyTrak build Data merge process for IW and MAI for ANES Updates to ST Admin 25 Creation of a generic data dictionary Fixed build issue for SurveyTrak 11 Updated Patch PBD sent to the field Data merge for IW and MAI (ANES) Bug fix for ST Employee Data Merge Enhancement for DB Extractor in ST 11 Review of WebTrak with Holly for ANES Meetings: including a meeting for ColdFusion rollout Updated RCLS and SQLA17 		

Special Issues		<p>I am writing to inform you about the budget status for our maintenance account. We were originally allocated a budget of \$20,000 for the current fiscal period. However, due to essential expenditures related to both the ongoing Surveytrak maintenance and the pending Surveytrak25 release for MTF 25, we have exceeded the allocated amount. To date, our total expenditure stands at \$38,694, resulting in an overage of \$18,694. I would like to highlight that we did not utilize all allocated funds for our SQL Anywhere migration as initially planned. This allowed us to reallocate part of those funds to cover our immediate and imperative needs for Surveytrak25 maintenance, prioritizing the system's current functionality and future readiness. To prevent future budget overages and improve our financial management processes, we will be implementing a new protocol. Going forward, we will send detailed updates to FIN Ops prior to charging the account. This will allow us to ensure we remain within budget and make any necessary adjustments in advance. This year has been exceptionally busy for our team, particularly for Marsha, who took the initiative to lead most, if not all, maintenance efforts for Surveytrak, ST International, Surveytrak25, and all supporting applications. Her dedication and hard work have been instrumental in ensuring the smooth operation and future-readiness of these systems.</p>		
Cost as of Jul 26, 2024	Total Cost to Date (direct + indirect):			38,694.00
	Est Cost at Completion (E\$AC):			38,694.00
	Total Budget:			20,000.00
	Variance (Total Budget minus- E\$AC):			-18,694.00
	Reason for Variance:			
Projections as of Jul 26, 2024	Dollars Projected for Month:			1,607.00
	Actual Dollars Used:			4,937.00
	Variance (Projected minus Actual):			-3,330.00
	Reason for Variance:	See below		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

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

Report Period	June, 2024 (TSME24 SSL Autoscheduler		Implementing
Risk Level	Some Concerns		
Monthly Updates	No further work was completed in June - still waiting on some implementation from May to free the workaround of seeing previous versions without having to download and save.		
Special Issues			
Cost as of May 14, 2024	Total Cost to Date (direct + indirect):	0.00	
	Est Cost at Completion (E\$AC):	0.00	
	Total Budget:	1.00	
	Variance (Total Budget minus- E\$AC):	0.00	

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

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

Report Period	June, 2024 (TSME24 STrak: Migration to		Initiation
Risk Level	On Track		
Monthly Updates	Production, reporting and SSL database servers created. Finishing touches, reports, scheduled tasks, update of SurveyTrak applications, etc. will take place as needed.		
Special Issues			
Cost as of Jul 17, 2024	Total Cost to Date (direct + indirect):		23,914.89
	Est Cost at Completion (E\$AC):		23,914.89
	Total Budget:		30,000.00
	Variance (Total Budget minus- E\$AC):		6,085.11
	Reason for Variance:		none
Projections as of Jul 17, 2024	Dollars Projected for Month:		3,733.20

Actual Dollars Used: 2,723.37

Variance (Projected minus Actual): 1,009.83

Reason for Variance: none

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

Other Measures

Project Name	(TSME25 SRO System Maintenance - General (483910)) TSME25 SRO System Maintenance - General (483910) (On Track)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 20,000.00	Indirect Budget: 0.00	Total Budget: 20,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Jeffrey L. Smith Budget Analyst: Ivanna Iavorska-Em Production Manager: Senior Project Advisor: Production Manager 1: Production Manager 2:		
Proposal #	no data		
Description	Support for TSG systems		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	June, 2024 (TSME25 SRO System		Implementing
Risk Level	On Track		
Monthly Updates	<ul style="list-style-type: none"> • Follow-up on ST Admin features poll • Regression test plan template for SurveyTrak • Generic data dictionary for new DB schema • Updates on SurveyTrak build • Data merge process for IW and MAI • Updates to ST Admin 25 • Creation of a generic data dictionary • Fixed build issue for SurveyTrak 11 • Updated Patch PBD sent to the field • Data merge for IW and MAI (ANES) • Bug fix for ST Employee Data Merge • Enhancement for DB Extractor in ST 11 • Review of WebTrak with Holly for ANES • Meeting for ColdFusion rollout • Updated RCLS and SQLA17 		

Special Issues				
Cost as of	Total Cost to Date (direct + indirect):			20,000.00
	Est Cost at Completion (E\$AC):			20,000.00
	Total Budget:			20,000.00
	Variance (Total Budget minus- E\$AC):			0.00
	Reason for Variance:			see below
Projections as of	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				