Survey Research Operations

Monthly Project Report

Sponsored Data Collection Projects and Development Initiative

September 2024

Sponsored Data Collection Projects and Development Initiative Projects

(ANES 2024) American National Election Studies - 2024

(BFY) Baby's First Years

(BHM Library Project) Developing a Model of Black History Month Programming in Public Libraries

(CARE Military) Concussion Assessment, Research and Education (CARE) Consortium 2022 - Military

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

(CCS) Community College Survey

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

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

(Healthy Brain Project) Healthy Brain Project

(HRS 2022 Panel & Baselines) Health and Retirement Study 2022 Main Interviews

(HRS 2024) Health and Retirement Study 2024

(HRS2022-Screening) HRS 2022 - Screening

(LHMS 2023 Fall) Life History Mail Study Fall 2023

(LHMS 2023 Spring) Life History Mail Study Spring 2023

(MI CReSS (Year 3 & 4 & 5)) Michigan COVID-19 Recovery Surveillance Cohort Study

(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027

(MTF Early Panel Pilot) Monitoring the Future: A Cohort-Sequential Panel Study of Drug Use, Ages 19-65 - Administrative Supplement #1 (8/10th Grade Panel)

(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027

(NDWS) National Dementia Workforce Study

(PR-PSID) Puerto Rico Panel Study of Income Dynamics

(PSID 2025 OCU) PSID 2025 Online Contact Update

(PSID CDS 2023) PSID Childhood Development Supplement 2023

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

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

(PSID23) Panel Study of Income Dynamics Core 2023

(PSID25) Panel Study of Income Dynamics Core 2025

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

(SCA 2024) Surveys of Consumer Attitudes

(SCA Web) SCA Web

(SCIP 2024) Sustainability Cultural Indicators Project

(SRS 2021) Social Relations 2023

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

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

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

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

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

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

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

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

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

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

(TSME25 UI Testing Tool (423463)) TSME25 UI Testing Tool (423463)

Sponsored Projects Dashboard

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

Project Name	**(ANES 2024) American National Election Studies - 2024 (Some Concerns)**
Project Mode	Primary: Web Secondary: Face to Face Total of Modes: 3
Project Type	Sponsored Projects
Budget	**Direct Budget**: 4,507,806.00 **Indirect Budget:** 2,418,434.00 **Total Budget:** 6,926,240.00
Principal Investigator/Clients	Nicholas A. Valentino (University of Michigan)
	Shanto Iyengar (Stanford University)
	D. Sunshine Hillygus (Duke University)
Funding Agency	National Science Foundation (NSF)
IRB	***HUM#:*** HUM00226016 ***Period of Approval:*** Study is exempt
Project Team	***Project Lead:*** Andrew L Hupp
	Budget Analyst: William Lokers
	Production Manager: Theresa Camelo
	Senior Project Advisor: Grant D Benson
	Production Manager 1: Margaret Lavanger
	Production Manager 2: Lisa Van Havermaet
Proposal #	no data
Description	The mission of the American National Election Studies (ANES) is to inform explanations of election outcomes by providing data that support rich hypothesis testing, maximize methodological excellence, measure many variables, and promote comparisons across people, contexts, and time. The ANES serves this mission by providing researchers with a view of the political world through the eyes of ordinary citizens. SRO will be conducting the 2024 data collection.
SRO Project Period	07/2023 - 01/2025
Data Col Period	
Security Plan	NA

Milestones

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

Other Project Team Members	Erin McSpadden - Project Manager for the methods pilot Sharon Parker - Production Manager for the methods pilot Raphael Nishimura - Sampling (pilot and production) Paul Burton - Sampling and Reporting Makenna Harrison - Sampling and Reporting Grace DesJardins - Project Support 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 Shanie Empie - Login portal Hueichun Peng - Self-scheduler Tony Romanowski - Technical specifications and testing Andrew Piskorowski - ODS Kelly Chatain - MSMS specs and testing Elizabeth Ohryn - Testing, SSL support William Lokers - Video interviewing coordination in SSL and field support
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 (MSG)
QC Recording Tool	Camtasia
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post ($25/$40 Escalation to $100; $150 for in-person); Cash, prepaid ($5/$10); Cash, post (Pre-Election token amount)

Payment Method	Check through STrak RPay System; Check through other system (MSMS via RPay); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (MSMS via RPay); Imprest Cash Fund from ISR Business Office (MSMS via RPay)

Report Period	Sep, 2024 (ANES 2024)	Implementing
Risk Level	Some Concerns	

Monthly Updates	Current production/goal (%) - There are 18 days In-person: 750/1,200 (63%) - The PIs would like 1,000 interviews. We are 75% of the way to that goal. -Telephone 3 (of the 750) Web - Fresh: 1,950/2,400 (81%) Web - Panel: 2,036/2,136 (95%) Web - GSS: 848/900 (94%) Interventions Coming: A text message to limited access cases with a (located) phone number in the Washington DC PSU. (X% of cases are limited access in Washington DC). The research team asked for a text message to fresh web cases with a household that may have an 18-29 year old. Raphael has assembled the information from L2 data. The PIs improved an increase in the in-person incentive to $150. Previously approved and implemented: Telephone interviewing (they've recently allowed us to use phone whenever we need to). We previously increased the incentive from $50 to $100 on 10/3. A targeted Republican letter. A large batch went out for fresh web cases. Smaller batches have been going out on a flow basis for in-person cases. Raphael has been reporting the spread between Republican and Democratic completion is narrowing. Paper questionnaires are being mailed to fresh web cases on Monday. Those households have the option of completing a shorter paper version (for $50), or the longer web version (for $100). Those questionnaires are sent to Ann Arbor, and we will forward them to MSG for data capture. Training There was a training in the SSL on October 11 with 4 SSL interviewers and 1 student. The post-election video training is planned for October 28-30 for 10 interviewers and 5 TLs. The in-person post-election briefings (~3 hours) will be held with the field staff in one of three sessions planned for 11/7 and 11/8. Post-Election Systems Blaise programmers are addressing testing comments. We received some specs from the project staff later than expected. The MSMS protocol is being developed and tested (we are using the same project with an additional post-election interviewing task). SurveyTrak needs testing (with a Blaise instrument). We are beginning the assignment of Zoom links to cases and sending calendar invites to Rs. The project staff thinks the earliest we can begin post-election data collection is November 9 (a Saturday), with the latest being November 11. We currently have 96 video appointments before November 9. Before November 11 there are 140. Dan T. has developed a report that is assisting us with the dates and times of appointments to see if there are days/times the SSL may be overloaded. The field is in the process of identifying a few people who could help, both to cover and for other situations like late West Coast appointments. I've had a preliminary discussion with project staff about all of the appointments we have scheduled in general and the potential inefficiencies that might present for the field. To date, more than 60% of completed pre-election interviews have scheduled a video appointment. If that holds, 600+ of the 1,000 pre-election interviews would be tied up (i.e., unavailble to the field) for some time and the potential problem that presents (especially with the number of travelers we have).

Special Issues	

Cost as of Oct 18, 2024	*Total Cost to Date (direct + indirect):*	2,663,886.13
	Est Cost at Completion (E$AC):	7,542,794.26
	Total Budget:	6,926,240.00
	Variance (Total Budget minus- E$AC):	-616,554.26
	Reason for Variance:	Project staff has received word from the funding agency that additional funds are available. Project staff will be transferring funds to cover the overrun.

Projections as of Oct 18, 2024	*Dollars Projected for Month:*	1,098,592.09
	Actual Dollars Used:	644,067.78
	Variance (Projected minus Actual):	454,524.31
	Reason for Variance:	Unused projections were moved forward. MSG costs did not hit in September.

Measures		Units at Complete	RR	HPI
	Current Goal:	1,200	38%	10.5
	Goal at Completion:			
	Current Actual:	750	24.8%	14.93
	Estimate at Complete:			
	Variance:			

Other Measures	

Project Name	(BFY) Baby's First Years (On Track)		
Project Mode	Primary: Face to Face Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 6,576,681.00	**Indirect Budget:** 2,123,680.73	**Total Budget:** 8,700,361.73
Principal	Dr. Greg Duncan (University of California - Irvine)		
Investigator/Clients	Dr. Kimberly Noble (Teachers College Columbia University)		
	Dr. Katherine Magnuson (University of Wisconsin)		
Funding Agency	National Institute of Child Health and Human Development (NICHD)		
IRB	**HUM#:** HUM00137963		**Period of Approval:**
Project Team	**Project Lead:** Piotr Dworak		
	Budget Analyst: David Kellermeyer		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Margaret Lavanger		
	Production Manager 2:		
Proposal #	no data		

Description	University of Michigan Survey Research Center (U-M SRC) is contracted to recruit and interview participants for Baby's First Years -- a longitudinal randomized control trial study.
	
	The study's full name, listed on sub-contract documents, is Household Income and Child Development in Early Years. The study will draw on a convenience sample of mothers and their newborns in four US metropolitan areas: New York City; Omaha/Lincoln; New Orleans; and Minneapolis. One or two hospitals, listed in this application, will be used as recruiting sites in each area. The study uses a randomized control trial design in which low-income mothers and newborns will be randomly assigned to a treatment group that receives an unconditional income enhancement -- cash payments of $333 per month—an amount roughly comparable to a variety of income assistance policies in the U.S. and shown to be associated with meaningful improvements for poor children in prior studies—or to a control condition that receives $20 per month. In both groups, the payments will be made for the first 40 months of the child's life. To understand the impacts of added income on children's development, researchers will assess treatment/control group differences at ages 1, 2 and 3 on measures of cognitive, language, memory, self-regulation and socio-emotional development. Recruitment is scheduled to start in April of 2018, and each follow-up interview will be conducted 12 months later -- close in time to the child's 1st, 2nd, and 3rd birthday. The feasibility of the approach has been established in a one-year pilot conducted in 2014 at the New York Presbyterian Hospital/Columbia University Medical Center.
	
	The Principal Investigators are Dr. Greg Duncan from University of California Irvine (UCI), Dr. Kimberly Noble from Teacher's College Columbia University (TCCU), and Katherine Magnuson from University of Wisconsin-Madison (UWM). UCI (Dr. Duncan) and TCCU (Dr. Noble) are the institutions and signatories funding the U-M SRC subcontract from various sources including the National Institute for Child Health and Human Development (NICHD) and private foundations listed in this application. The study research team also includes co-investigators Lisa Gennetian (New York University), and Hiro Yoshikawa (New York University).
	
	SRO will be responsible for four interactions with the selected mothers/infants:
	• Baseline will occur immediately (within 24-48 hours) after birth, in the hospital;
	• Wave 1 will be a telephone interview with the mother when the child is 12 months old;
	• Wave 2 will be an in-person interview in the family's home that includes survey, developmental assessment, biomarker collection, and video recorded behavioral interaction when the child is 24 months old;
	• Wave 3 will be an in-person survey done while the mother and child are visiting a lab for other clinical tests when the child is 36 months old.
	
	Each data collection phase/wave will be a full 12 months, with Baseline starting in April 2018:
	
	Recruitment/Baseline: 04/01/2018 - 03/31/2019
	           Wave 1: 04/01/2019 - 03/31/2020
	           Wave 2: 04/01/2020 - 03/31/2021
	           Wave 3: 04/01/2021 - 03/31/2022		

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

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

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

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

Report Period	Sep, 2024 (BFY)	Implementing
Risk Level	On Track	
Monthly Updates	BFY Age 5- 8:	

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

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

Lab recruitment outcomes: So far, we have sent nearly half of 1,000 participants (n = 523) over to the lab representing 99% of eligible respondents (eligible given their age cohort).

SRO interviewers were trained on using the Wisconsin sample management system in a limited way - to recognize cases assigned to them for hard-to-reach follow up. They also reviewed and practiced administering the Age 6 Phone survey with hard-to-reach respondents. This word is expected to ramp up but only with a limited set of cases (est. 5 - 10% based on prior experience).

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 Oct 16, 2024	*Total Cost to Date (direct + indirect):*	7,808,353.13
	Est Cost at Completion (E$AC):	8,719,042.08
	Total Budget:	8,700,361.73
	Variance (Total Budget minus- E$AC):	-18,680.35
	Reason for Variance:	Total overrun was decreased by reducing staff hours but will need to monitor scope to prevent it from growing. We do have some funds allocated for travel which are not used at the level they were projected

and can be reduced to further reduce the overrun.

Projections as of Oct 16, 2024	*Dollars Projected for Month:*			22,584.19
	Actual Dollars Used:			19,091.98
	Variance (Projected minus Actual):			3,492.21
	Reason for Variance:		Further analysis is needed but in Age 6 we are sending cases to lab earlier with respect to the focal child age and as such, we have already sent about 50% of the sample and our iwer follow up effort is reduced. However, in the upcoming months, SRO iwers will be asked to follow up with hard-to-reach cases and, in some cases, to complete phone surveys.	

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

Other Measures

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

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

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

Report Period	Sep, 2024 (BHM Library Project)		Implementing
Risk Level	Some Concerns		
Monthly Updates	We are in the midst of sending email invitations to the National Survey.		
Special Issues	Lookups by the team assembled by the PI remain a bit ungainly. Time consuming to re-format once these lists are completed and get the email invites out.		
Cost as of Oct 16, 2024	*Total Cost to Date (direct + indirect):*		129,712.54
	Est Cost at Completion (E$AC):		198,026.62
	Total Budget:		197,671.00
	Variance (Total Budget minus- E$AC):		-355.62
	Reason for Variance:	Minimal variance this month.	
Projections as of Oct 16, 2024	*Dollars Projected for Month:*		7,364.61
	Actual Dollars Used:		7,633.36

		Variance (Projected minus Actual):			-268.75

	Reason for Variance:	Minimal variance projected.		

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

Other Measures

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

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

This project has an overall SRO involvement period of 13 months, beginning March 2022, with data collection taking place over approximately 12 months starting mid-March 2022. SRO provides consultation, respondent locating activities and data collection for respondents in the uniformed services sample.

The goal is to secure participation from approximately 3,200 unique past-CARE study participants. Participants will complete a study assessment once over the 13-month project period.   SRO decentralized field interviewers locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct approximately 1,425 telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.

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

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

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

Report Period	Sep, 2024 (CARE Military)	Implementing
Risk Level	On Track	
Monthly Updates	September is the National Concussion Awareness Month. The CARE Consortium released the Fall Newsletter to	

respondents on 09/02/204. Four SRO project staff attended the 2024 CARE Investigator Conference in Chicago. We are planning to set new focus/priority to work on samples based on the reported research results from the conference. We continue to compensate respondents who residing overseas with Tango cards and implemented IRB approved email templates for contacting these respondents.

SRO continues to work on system issues with QG along with Datalys as well as SRO continues to fix locating reports.

SRO project team held a special meeting with the interviewers to review CP protocols due to changes in the CARE SMS.

Also, interviewers started a September Olympics theme challenge in September. As of 9/30/2024, the total completed Military cases (DCP2+DCP3) was 4096. In DCP3, total Released civilian samples =9669. Total Completed cases = 763 (Web=757, CATI = 6).

Special Issues			
Cost as of Sep 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 do not have new funding currently to support the military work. However, military work resumed in April 2024 with civilian funds. **Note: In September 2024, we allocated $54,359.12 to the Military project with the Civilian funds. This brings our cumulative spending on the military project to $288,429.02 from April to September 2024. The current spending on Military is reflected the underrun amount in Civilian funds.	
Projections as of Sep 30, 2024	*Dollars Projected for Month:*		0.00
	Actual Dollars Used:		52,516.66
	Variance (Projected minus Actual):		-52,516.66
	Reason for Variance:	Since we are using Civilian funds there are no projections for this account. **Note: In July 2024, we allocated $52,142.09 to the Military project with the Civilian funds. This brings our cumulative spending on the project to $174,202.37 from April to July 2024. The current spending on Military is reflected the underrun amount in Civilian funds.	

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

Other Measures

Project Name	(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022 (On Track)		
Project Mode	Primary: Telephone Secondary: Web Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 3,718,978.00	**Indirect Budget:** 966,936.00	**Total Budget:** 4,685,914.00
Principal Investigator/Clients	Dr. Steven Broglio (U of M Kinesiology)		
	Dr. Michael McCrea (Medical College of Wisconsin)		
	Dr. Thomas McAllister (Indiana University School of Medicine)		
Funding Agency			
IRB	*HUM#:* 00202691		*Period of Approval:* 7/23/2021 - open
Project Team	*Project Lead:* Donnalee Ann Grey-Farquharson		
	Budget Analyst: David Kellermeyer		
	Production Manager: Barbara Aghababian-Homburg		
	Senior Project Advisor: Barbara Lohr Ward		
	Production Manager 1: Hongyu Johnson		
	Production Manager 2: Keith Liebetreu		
Proposal #	no data		
Description	In 2014, the U.S. Department of Defense (DoD) and the National Collegiate Athletic Association (NCAA) established and funded the Concussion Assessment, Research and Education (CARE) Consortium to inform science, clinical care and public policy related to concussion and repetitive head impact exposure (HIE) in U.S. Military Service Academy (MSA) cadets and collegiate student-athletes. Since then, CARE has enrolled >50,000 MSA cadets/midshipmen and NCAA student-athletes from 30 participating collegiate institutions, representing 26 NCAA sports, and military training and other recreational activities. In addition, the CARE study has captured data on over 5,000 concussed cadets/midshipmen and athletes – the largest concussion database of its kind. This public-private study is designed to answer key knowledge gaps around clinical and neurobiological recovery, brain structure and function, and factors predicting outcomes in MSA members and NCAA student-athletes. This CARE/SALTOS Integrated (CSI) Study phase investigates the nature and causes of long-term effects of head impact exposure and concussion/mild traumatic brain injury (mTBI) in former NCAA student-athletes and military service members. The data collected in this phase will build on that collected in previous phases

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

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

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

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

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

Other Project Team Members	Donnalee Grey-Farquharson, Barb Homburg, Hongyu Johnson, Keith Liebetreu, James Koopman, Ruyi Chen, David Ackuaku, David Kellermeyer
Other Project Name	CARE CSI, CARE SALTOS
Sample Mgmt System	Other (non-SRO)

Data Col Tool	Other (non-SRO)
Hardware	Laptop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, R
Administration	UM Group (Kinesiology)
Payment Type	Check, post ($150.00)
Payment Method	Check through other system (UM)

Report Period	Sep, 2024 (CARE SALTOS MTEC)	Implementing
Risk Level	On Track	
Monthly Updates	September is the National Concussion Awareness Month. The CARE Consortium released the Fall Newsletter to respondents on 09/02/204. Four SRO project staff attended the 2024 CARE Investigator Conference in Chicago. We are planning to set new focus/priority to work on samples based on the reported research results from the conference. We continue to compensate respondents who residing overseas with Tango cards and implemented IRB approved email templates for contacting these respondents. SRO continues to work with QG and Datalys to address system issues. SRO project team held a special meeting with the interviewers to review CP protocols in response to the changes in the CARE SMS. Also, interviewers started a September Olympics theme challenge in September. As of 9/30/2024, the total completed civilian cases (DCP2+DCP3) was 5620. In DCP3, total Released civilian samples = 20019. Total Completed cases = 2314 (Web=2286, CATI = 28).	

Special Issues		
Cost as of Sep 30, 2024	***Total Cost to Date (direct + indirect):***	3,033,970.89
	Est Cost at Completion (E$AC):	4,635,630.61
	Total Budget:	4,685,914.00
	Variance (Total Budget minus- E$AC):	50,283.39
	Reason for Variance:	Although the new regular staff salary increased rates took effect in September, variance of underrun increased this month due to reduction of three key project staff hours in order to support another project. Projections will be adjusted. **Note: In September 2024, we allocated $54,359.12 to the Military project with the Civilian funds. This brings our cumulative spending on the military project to $288,429.02 from April to September 2024. The current spending on Military is reflected the underrun amount in Civilian funds.
Projections as of Sep 30, 2024	***Dollars Projected for Month:***	146,151.64
	Actual Dollars Used:	128,979.56
	Variance (Projected minus Actual):	17,172.08
	Reason for Variance:	Difference is due to reduced regular staff hours. projections will be adjusted.

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

Other Measures

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

Milestones		
Pre Production Start: 08/01/2024	*Pretest Start:*
Pretest End:	*Recruitment Start:* 09/17/2024
Staffing Complete:	*GIT Start:*
SS Train Start: 10/23/2024	*SS Train End:* 10/23/2024
DC Start: 10/14/2024	*DC End:* 12/08/2024

Other Project Team Members	Marsha Skoman - Qualtrics Programmer Ed Green - Data Manager Hueichun Peng - Web SMS Programmer
Other Project Name	How Community College Students Choose Programs of Study
Sample Mgmt System	Web SMS
Data Col Tool	Other (Qualtrics)
Hardware	Desktop
DE Software	NA
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group
Payment Type	Cash, prepaid ($5); Cash, post ($40); Other (Visa electronic gift cards, Amazon gift codes)
Payment Method	Imprest Cash Fund from ISR Business Office; Other (VISA eGift cards from HSIP, Amazon gift codes from Teachers Coll)

Report Period	Sep, 2024 (CCS)	Implementing
Risk Level	On Track	
Monthly Updates	Project Management -In September, Jeffrey worked with the team to coordinate survey testing and Web SMS setup. -Jeffrey set up a prod progress report in Google sheets for the PIs and also a Qualtrics report. -Steven coordinated with the business office to prepare TOAs and coordinated with PrintCopyMail to prepare for the invitation card mailing. Survey Setup -Marsha mostly completed the survey setup, including working with Steven and SpanTran to coordinate final Spanish translations. Web SMS Setup -Hueichun made progress on Web SMS setup, including setting up the email and text message communications and schedules.	

Data Management
-Ed and Jennie worked on the Wave 3 testing and prod preload. After the data error in Wave 2, Jeffrey and the DMs developed and implemented new testing procedures for Qualtrics DM work (no Qualtrics testing procedures had previously been developed at SRO).
-At the PDMG Senior Mgrs meeting on 10/17, Shonda noted that some TSG staff appear to be under-projected. As a reminder, for the CCS Wave 3 re-budget, significant effort was shifted from data management to respondent payments, because there are fewer needs for data management on the project. This has been accurately reflected in the CRS/RFT projections, but some tasks have taken a bit longer (by ~10 hours) for Ed (and Jennie) to complete than was projected.

IRB
-CCRC and U-M IRBs approved the Wave 3 proposal.

Special Issues	None. Data collection is off to a strong start. We have only reached half of the sample so far and have a 40% RR among those contacted after a single email/text (before receiving invitation cards or reminder calls).

Cost as of Oct 10, 2024	*Total Cost to Date (direct + indirect):*	631,141.67
	Est Cost at Completion (E$AC):	839,808.02
	Total Budget:	644,889.00
	Variance (Total Budget minus- E$AC):	-34,225.02
	Reason for Variance:	In September, Jeffrey and the Proposals Team worked with the PIs to arrive at a Wave 3 rescope agreement to account for the missing data in Wave 2. The new agreement includes ~$35,000 paid by Stephanie by the end of Wave 3, so we anticipate an overrun for the remainder of the project.
Projections as of Oct 10, 2024	*Dollars Projected for Month:*	26,442.34
	Actual Dollars Used:	20,516.31
	Variance (Projected minus Actual):	5,926.03
	Reason for Variance:	In September, Hueichun made progress programming Web SMS but was needed more urgently on other projects and so worked about half of the hours on CCS that were projected. Similarly, Marsha worked less than anticipated on survey setup and testing. R&D, vacation, and fringe benefits were about $3,000 (total) over-projected.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	700	15%	
	Goal at Completion:	2112	47%	
	Current Actual:	694	15%	
	Estimate at Complete:	2112	47%	
	Variance:	0	0	

Other Measures

Project Name	**(CVFS-SCAN) Chitwan Valley Family Study - Study on Cognition and Aging in Nepal (Some Concerns)**		
Project Mode	Primary: Face to Face Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 368,868.00	**Indirect Budget:** 206,571.00	**Total Budget:** 575,439.00
Principal	Dirgha Ghimire (Survey Research Center)		
Investigator/Clients	Carlos Mendes de Leon (Georgetown University School of Medicine)		
	Emily Briceno-ABreu, Co-PI (Michigan Medicine)		
Funding Agency	NIH		
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Maureen Joan O'Brien		
	Budget Analyst: Ryan Neice		
	Production Manager:		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	SRO is working cooperatively with the PIs and their research team as well as the Institue for Social and Environmental Research – Nepal – ISERN – to provide consultation, programming and support for data collection over 2 waves of interviewing. SRO will provide support in the following areas: instrument programming and testing, sample management system programming and testing, and data delivery.		
SRO Project Period	07/2024 - 03/2025		
Data Col Period			
Security Plan	NA		

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

Other Project Team Members	Technical Lead: Jennie Williams, TSG 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	Sep, 2024 (CVFS-SCAN)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Timeline: There are concerns with project timeline. As a result, just this week the Iwer training has been postponed by 3 weeks and the PIs decided to delay Day 2 of the interview (health status questionnaire and whole blood draw collection). Factors contributing to the delay in meeting deadlines include: • ISER-N was delayed in providing Blaise specs to SRO which delayed the start of programming. • The PIs added a Pretest (to test iw length) and a Focus group (to review translations) to pre-production that were not originally scoped. Although SRO is not involved in Pretest or the focus group, ISER-N staff has been focused	

on these activities and have not been testing as intended. The ISER-N team has assured SRO that they have identified a team that will focus only on CTT testing. Additionally, the ISER-N team has stated they are having trouble testing the instrument in English and would like to test in Nepali. SROs workflow starts with the instrument in English, then once tested, translations are added to Blaise for testing. As a result, the ISER-N team will test in English for flow, fills, and logic, and then translations will be added.
• SRO Blaise programming resources are very tight. Technical staff has reported being busy with other high priority projects and are not able to work projected CVFS-SCAN hours.   In addition, there has been difficulty in keeping up with the volume and complexity of programming this instrument.
• The questionnaire is much longer than originally scoped. It includes 22 cognitive assessments of which only 4 are common with HCAP. There are several additional sections of R questions that were not included in HCAP, as well as a Health Assessment and extensive blood draw protocols. The interview was planned to take place across 2 days or more if needed due to length. As stated above, the PIs have opted to delay Day 2 assessments and focus only on the R interview, cognitive assessments, and Inf iw at this point. We expect this will allow SRO staff to focus their effort and meet the new timeline deadlines.
We will continue to monitor timeline closely, as Pretest tasks in ISER-N are more behind schedule than originally communicated to SRO and could take attention away from testing and finalizing Blaise / systems. Pretest outcomes regarding iw lng will be valuable information, but there is not time to make major changes to the instrument beyond some cuts at this point. The project lead and technical lead are attending Iwer training in late Jan, 2025.
IRB: The Nepal IRB has granted approvals and is currently under review with Michigan IRB. Approval is expected soon. The PIs are answering IRB questions.

Technical updates: Surveytrak systems are being programmed using CIDI specs as a starting point. HCAP 2022 Surveytrak specs have been reviewed as well to help program the Informant line and associated tabs.

Hardware: ISER-N has run into some difficulty purchasing Iwer laptops due to the in flooding in Nepal. We expect they will still arrive within the desired timeline. Two lapotps identical to ISER-N Iwer laptops will ship to SRO for testing purposes.
Questionnaire/Blaise Programming: SRO is in possession of all Blaise specs at this points. The PIs decided that a Proxy may stand in and complete the Respondent interview, excluding the cognitive assessments, and that if a Proxy is used, there will be no attempt with the R interview. SRO has been working on programming the Blaise instrument for a few weeks now. We are beginning to test in CTT.

Translations: The instrument is being translated into Nepali by ISER-N staff. Once there is Michigan IRB approval and the questionnaire is translated, an ISER-N focus group will review the translations to ensure language is appropriate. Then, translations will be loaded to Blaise and testing will resume in Nepali. The process for loading translations to Blaise are being determined next week.

Training: We added a regular weekly Training meeting with ISER-N to our schedules. We will work through agenda, presentations, materials, etc.. for the Feb training.

Special Issues				
Cost as of Oct 16, 2024	*Total Cost to Date (direct + indirect):*			80,275.80
	Est Cost at Completion (E$AC):			281,359.38
	Total Budget:			575,439.00
	Variance (Total Budget minus- E$AC):			294,079.62
	Reason for Variance:	Costs are currently projected through March 2025 but will be extended once SRO's role during data collection is more clearly defined.		
Projections as of Oct 16, 2024	*Dollars Projected for Month:*			40,730.95
	Actual Dollars Used:			29,028.60
	Variance (Projected minus Actual):			11,702.35
	Reason for Variance:	The September underrun was mainly due to technical staff undercharging. Unused staff hours have been pushed forward.		

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

Other Measures

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

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

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

Report Period	Sep, 2024 (Health and Well Being in SE MI)	Implementing
Risk Level	Some Concerns	
Monthly Updates	D-AMP/Healthy Brain convenience sample is going well. The HPI for the convenience sample is just under 4 hours per main & informant interview combined – it was budgeted at 7.5 hours per interview combined. This, plus the fact that the Healthy Brain start-up was delayed, is leading to a projected underrun on Healthy Brain. We are currently projecting that we will expend the full D-AMP budget assuming interviewing continues into February 2025. At present we have interviewer hours projected through the week of February 22, which would imply interviewing through early February. However it is unclear if we will have enough sample to support interviewing through that date. As of October 18 we have 225 (goal 200) new sample completes, 270 (goal 400) convenience sample completes, and 101 (goal 200) panel completes. We are slightly ahead of schedule on convenience sample; we will likely meet the convenience sample goal before the December holiday break. The existing panel sample will not produce 200 completes, and the PIs have been advised of this. 37.8% of the

sample are cases that were either lost or were refusals/non-interviews in previous waves of the study (some have not participated since 1992). Our response rate with these cases is 5%, versus 42% with panel cases who have participated in a previous wave when asked to do so.

We are planning a release of additional panel sample (247 sample lines) to get closer to the goal of 200 completes, however we do not think that this will not keep the full team busy through February. We will begin reviewing non-final screened-in cases and non-final screening lines to see if we can increase the number of completed new-sample cases, and at the same time use the full D-AMP budget.

The study team approved an increase in the TOA for D-AMP existing panel cases from $100 to $200, and approved a method of taking a fully-telephone interview with cognition tasks. These changes are currently being reviewed by the IRB. We hope that these changes will help us get to or exceed our panel goal on D-AMP of at least 200 cases. There is no end-game TOA approved for new sample cases, or for this newest release of panel cases.

Interviewers and team leaders do not understand how to divide their time between D-AMP and Healthy Brain, which should be allocated 1/3 D-AMP and 2/3 Healthy Brain. We are working with our PMs to develop a method of balancing interviewer hours that will not require field team members to divide their time across the two projects. Currently we are turning shortcodes on and off in Tenrox in order to achieve balance between the two projects.

Special Issues	We have talked to the PIs about requesting a no-cost time extension for D-AMP, which ends 5/31/2025.		
	We are having a great deal of difficulty getting the field team to balance their charges between D-AMP and Healthy Brain. This is causing underruns in one project and overruns in the other.		

Cost as of Oct 17, 2024	***Total Cost to Date (direct + indirect):***		3,308,629.13
	Est Cost at Completion (E$AC):		3,756,871.47
	Total Budget:		3,758,127.00
	Variance (Total Budget minus- E$AC):		1,255.53
	Reason for Variance:	This is an insignificant variance. We expect the project to use the full budget for production.	
Projections as of Oct 17, 2024	***Dollars Projected for Month:***		44,763.68
	Actual Dollars Used:		44,025.13
	Variance (Projected minus Actual):		738.55
	Reason for Variance:	This is an insignificant variance for the month.	

		Units at Complete	**RR**	**HPI**
Measures	***Current Goal:***	200/400/200 design		9.0 new/ 9.0 panel
	Goal at Completion:	200/400/200 design		
	Current Actual:	226/273/101	39% scrnr; 43% main	7.7 new/13 panel
	Estimate at Complete:			
	Variance:			
Other Measures	Actuals are as of 10/20/2024. The budgeted HPI for the convenience sample was 6.5 HPI plus 1 HPI for the informant. We are running at 3.5 HPI for the convenience sample.			

Project Name	**(Healthy Brain Project) Healthy Brain Project (Some Concerns)**
Project Mode	Primary: Face to Face Total of Modes: 1
Project Type	Sponsored Projects
Budget	**Direct Budget**: 985,452.00 **Indirect Budget:** 551,854.00 **Total Budget:** 1,537,306.00
Principal	Kristine Ajrouch (Research Center for Group Dynamics, ISR)
Investigator/Clients	Toni Antonucchi (Life Course Development Program, SRC)
	Laura Zahodne (Life Course Development Program, SRC)
Funding Agency	
IRB	***HUM#:*** HUM00199306 ***Period of Approval:*** 9/5/2023 - 9/4/2024
Project Team	***Project Lead:*** Barbara Lohr Ward
	Budget Analyst: Christine Evanchek
	Production Manager: Veronica Connors-Burge
	Senior Project Advisor: Nicole G Kirgis
	Production Manager 1: Taghreid Lovell
	Production Manager 2: Ian Ogden
Proposal #	no data
Description	The participants in this study will be Arab American men and women aged 65+ as well as non-Arab men and women aged 65+ from the Social Relations Study (SRS) (HUM00187453) living in the metropolitan Detroit area who have participated in the Detroit Aging and Memory Project (D-AMP) (HUM00154638).

The proposed study is in response to PAR-19-070 and will test links between sociocultural experiences, brain aging, and cognitive health. The following specific aims will be accomplished by obtaining structural MRI and blood-based AD biomarker data in the Detroit-Aging and Memory Project (D-AMP). This funded parent study obtains high-quality ADRD phenotypes and genetic data on those aged 65+ from a representative sample of 600 Arab Americans, as well as panel participants (N=298) from the Social Relations Study (SRS), to compare to non-Arab Whites in the same geographic area. |
SRO Project Period	07/2024 - 05/2025
Data Col Period	07/2024 - 05/2025
Security Plan	NA

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

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

Report Period	Sep, 2024 (Healthy Brain Project)	Implementing
Risk Level	Some Concerns	
Monthly Updates	There are no significant changes to the Healthy Brain Study. We are still struggling to get the field team to understand how to charge their time across D-AMP and Healthy Brain. We are currently managing this by turning shortcodes off and on again. The current percentage of D-Amp participants who agree to be contacted for Healthy Brain is 67%. We are having a great deal of difficulty getting interviewers and team leaders to charge their time appropriately, even though interviewers are given an indication in SurveyTrak of how to charge their time. If we are unable to balance D-AMP and Healthy Brain field costs, D-AMP will run out of money to fund the interviews for the 33% who do not subscribe to the Healthy Brain project.	

Reminder: The Healthy Brain Project is being run concurrently with D-AMP, with the respondents being considered to be directly recruited by interviewers into the Healthy Brain Project. If, during the D-AMP interview, the respondent agrees to be contacted by the research team for the Healthy Brain Project, the case can be charged to Healthy Brain.

Special Issues	The imbalance in how interviewers and some Ann Arbor staff are charging their time has cause large variances in monthly projections between D-AMP and Healthy Brain. We are working to give all team members very specific instructions on how to charge their time. This is the reason for the "some concerns" flag.

Cost as of Oct 17, 2024	*Total Cost to Date (direct + indirect):*	526,113.33
	Est Cost at Completion (E$AC):	1,498,916.98
	Total Budget:	1,537,306.00
	Variance (Total Budget minus- E$AC):	38,389.02
	Reason for Variance:	The projected variance is due to the late start up of the Healthy Brain project (pushing more costs to D-AMP), and the low HPI on the D-AMP convenience sample.
Projections as of Oct 17, 2024	*Dollars Projected for Month:*	215,875.95
	Actual Dollars Used:	126,092.64
	Variance (Projected minus Actual):	89,783.31
	Reason for Variance:	This significant variance is due to interviewers and team leaders not charging their time appropriately between the D-AMP and Healthy Brain project, as well as some Ann Arbor staff not splitting their time appropriate (or not charging Healthy Brain at all). We are working on this issue with all staff members, including giving some people specific instruction on charging their time. In addition, some non-salary items are still being charged fully to D-AMP - we are working on this as well.

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

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

Project Name	(HRS 2022 Panel & Baselines) Health and Retirement Study 2022 Main Interviews (Some Concerns)		
Project Mode	Primary: Mixed Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 13,982,815.00	**Indirect Budget:** 5,033,815.00	**Total Budget:** 19,016,630.00
Principal	David Weir (ISR-SRC)		
Investigator/Clients			
Funding Agency			
IRB	*HUM#:* HUM000611128		*Period of Approval:* 6/7/2023-6/6/2024
Project Team	*Project Lead:* Evanthia Leissou		
	Budget Analyst: David Kellermeyer		
	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 - 06/2025		
Security Plan	NA		

Milestones	*Pre Production Start:* 01/01/2021	*Pretest Start:* 11/01/2021
	Pretest End: 11/23/2021	*Recruitment Start:* 08/01/2021
	Staffing Complete: 01/15/2022	*GIT Start:* 02/21/2021
	SS Train Start: 02/23/2022	*SS Train End:* 03/03/2022
	DC Start: 03/07/2022	*DC End:* 06/21/2025

Other Project Team Members	Derek Dubuque (Production Manager), Alex Warju (Production Manager), Milagros Hierro (Production 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), Cindy Huang (Budget Analyst), Andria Goedert (Project Assistant),

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

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

Report Period	Sep, 2024 (HRS 2022 Panel & Baselines)	Implementing
Risk Level	Some Concerns	
Monthly Updates	1. The project team has been working on baseline production monitoring, cost monitoring, sample management, logging, weekly mailings and scanning(SSA and SAQ), payment and letter request processing, and implementing	

the baseline endgame protocols.

2. Baseline production improved in September with interviewers working more hours and completing more baseline interviews than projected. Interviewers averaged 49 baseline iws/week. The % of baseline attempted each week in staffed areas continued to increase.

3. The MOC goal of 2,000 interviews was reached. MOC sample, excluding appointments, were pulled from the field to ensure EGenX baselines became the priority.

4. Strategies to boost production during September
- Offering proxy option for 2nd R in household,
- Re-releasing 756 additional EGenX cases
- Endgame experiment
- Prioritizing baselines vs screening at the PSU level

5. Interviewer training was conducted in Grand Rapids 9/25-10/2 for 54 interviewers.

6. Design planning began for converting the baseline interview into web mode to be used in the following scenarios:
   - Offer web to R2 after R1 has completed the full baseline iw by FTF/TEL
   - As pat an endgame protocol, offer web mode to both R1 and R2 in households where no one has completed the interview.
   - As an initial mode for a small random sub-sample of freshly web screened households, offer web mode first with use of FTF as part of a non-response follow-up.

*The "measures" table reflects Panel and Baseline combined as of 10/12/24. Breakdown of Panel and Baseline counts and rates in Other Measures Field.

Special Issues	Concerns about feasibility of reaching the EGenX baseline goal.

Cost as of Oct 16, 2024	*Total Cost to Date (direct + indirect):*	18,081,154.95
	Est Cost at Completion (E$AC):	18,078,230.95
	Total Budget:	19,016,630.00
	Variance (Total Budget minus- E$AC):	938,399.05
	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 Oct 16, 2024	*Dollars Projected for Month:*	-2,720.00
	Actual Dollars Used:	-4,195.84
	Variance (Projected minus Actual):	1,475.84
	Reason for Variance:	Variance due to fewer voids hitting the project in September than projected.

Measures		Units at Complete	RR	HPI
	Current Goal:	19,344	52%	12.2
	Goal at Completion:	22,215	44%	8.3
	Current Actual:	19,364	53%	12.2
	Estimate at Complete:	20,912	42%	9.8
	Variance:	1,303	2%	1.5

Other Measures	Panel: Revised RR Goal: 68% (original goal 74%), Final RR: 68% (Panel end date 9/2/23) MOC: Goal: 2,000 iws, Current: 2,041, RR: 36.3% EGenX generated from screener: Goal: 4,003 iws; Current: 2,385 iws from 9,164 lines spawned. RR: 26.3% 2019 EGenX baselines: Goal: 468 iws (70% RR), Current: 497 iws (74.4% RR)

Project Name	**(HRS 2024) Health and Retirement Study 2024 (Some Concerns)**		
Project Mode	Primary: Mixed Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 15,792,284.00	**Indirect Budget:** 5,685,224.00	**Total Budget:** 21,477,508.00
Principal Investigator/Clients	David Weir (ISR-SRC)		
Funding Agency			
IRB	*HUM#:* HUM000611128		*Period of Approval:* 6/7/2023-6/6/2024
Project Team	*Project Lead:* Evanthia Leissou		
	Budget Analyst: Richard Warren Krause		
	Production Manager: Andrea Sims		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Derek Dubuque		
	Production Manager 2: Jennifer C Arrieta		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.		
SRO Project Period	05/2023 - 08/2025		
Data Col Period	05/2024 - 05/2025		
Security Plan	NA		

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

Other Project Team Members	Alex Warju (Production Manager), Andrea Sims (Production Manager), Derek Dubuque (Production Manager), Gary Hein (Project Manager), Erin McSpadden (Project Manager), Daniah Buageila (Project Manager), Janet McBride (Project Assistant), Paul Burton (Stats/Sampling), Vanessa Clarke (Project Assistant), Jeannie Baker (Project Manager), Dedra Campbell (Project Manager), Chelsea Graham (Project Manager), Melissa Luker (Project Assistant), Anthony Romanowski (Project Manager), Megan Hromco (Project Assistant), Cindy Huang (Budget Analyst)

Tech Team: Karl Dinkelmann, Jeff Smith, Jim Rodgers, Laura Yoder, Marsha Skoman, Ashwin Dey, Pam Swanson, David Bolt, Deb Wilson, Jennie Williams, Rose Zybdel, Stephanie Windisch, Holly Ackerman, Shane Empie, Kelly Chatain, Brianna Sabol, Kelly Lieske, Asia Paige |
Other Project Name	HRS 2024 Panel
Sample Mgmt System	SurveyTrak; MSMS
Data Col Tool	Blaise 5; SAQ
Hardware	Laptop; [UM cell] Phone; Paper and Pencil
DE Software	Other (Blaise 5 Coding Application); External vendor (DataForce)
QC Recording Tool	Camtasia
Incentive	Yes, R; Yes, INF
Administration	NA
Payment Type	Check, prepaid ($100 (Interview)); Check, post ($50 (WBD), $20 (SAQ), $20 (SSA)); Cash, post ($20 (SAQ))
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office

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Report Period	Sep, 2024 (HRS 2024)	Implementing
Risk Level	Some Concerns	
Monthly Updates	-HRS 2024 activities continued with cost projections, technical specifications, technical development, testing, precontact mailing preparations, and pre-pay check processing.
-Web panel production was on hold pending IRB review of the Prescription Drug/Lab Results linkage protocol.
-We received a test version of DM3 with the Prescription Drug/Lab Results linkage programming included in September. SurveyTrak was programmed to push two new preload variables into Blaise that are needed for DM3. This DM was not released to the field in September due to the IRB review of the Prescription Drug/Lab Results	

linkage protocol amendment.
- Data managers worked with the HRS data processing team to resolve the discrepancies the SRO data managers identified in the sample and preload files for the final 1,650 cases that were delivered to SRO in September. As of end of September, issues were still being identified and addressed. There is concern this sample won't be ready to release immediately after the October training but there is still sufficient sample from the spring sample delivery that will be prepared for release after October training.
-Training and recruitment planning continued in preparation for an October 2024 training of ~100 interviewers.
-Production has been going well. Interviewers have exceeded hours and interview goals for the first two weeks of September. The last two weeks were below interview goal due to a large sample release that required interviewer effort to be spent on reviewing profiles/scheduling appointments and Hurricane Helene.
-Planning for implementation of prioritization and limited effort protocols began.

Measures in table below are as of 10/18/24.

Special Issues	-Projections are to the proposal budget, which had a significant cut from the original budget submitted for the 6-year renewal. We estimate when the funds run out we will be ~960 interviews short of the 70% RR goal.	
Cost as of Oct 18, 2024	**Total Cost to Date (direct + indirect):**	7,260,010.71
	Est Cost at Completion (E$AC):	21,477,768.34
	Total Budget:	21,477,508.00
	Variance (Total Budget minus- E$AC):	-260.34
	Reason for Variance: Minimal variance.	
Projections as of Oct 18, 2024	**Dollars Projected for Month:**	1,768,713.02
	Actual Dollars Used:	917,970.73
	Variance (Projected minus Actual):	850,742.29
	Reason for Variance: Variance is primarily due to the not yet having received the April training invoice from the hotel and advertising costs that have not yet hit. Future projections have been updated.	

Measures		Units at Complete	RR	HPI
	Current Goal:	5383	23.8%	7.0
	Goal at Completion:	15,842	70%	9.3
	Current Actual:	5252	23.2%	9.1
	Estimate at Complete:	15,842	70%	9.3
	Variance:	0	0	0

Other Measures

Project Name	**(HRS2022-Screening) HRS 2022 - Screening (Some Concerns)**		
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 21,264,149.00	**Indirect Budget:** 7,655,093.00	**Total Budget:** 28,919,242.00
Principal	David Weir (SRC)		
Investigator/Clients	Helen Levy (SRC)		
	Ken Langa (SRC)		
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Evanthia Leissou		
	Budget Analyst: Richard Warren Krause		
	Production Manager:		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Andrew L Hupp		
	Production Manager 2: Theresa Camelo		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample.		
SRO Project Period	02/2021 - 08/2024		
Data Col Period	03/2022 - 06/2024		
Security Plan	NA		

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

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

Report Period	Sep, 2024 (HRS2022-Screening)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Screening continues at a steady pace. For a few weeks we were below our production goal. We've since gotten back on track and exceeded both production and effort (hours) goals on screening. Release 8 has been released to the web and the field as necessary. The 6-week web period is almost over. We have released 15,229 cases to the endgame protocol. 1,264 cases (8.3%) of cases have completed a screener. 133 cases (10.5%) completed via the web, and 1,131 (89.50%) of cases completed in-person. Flagging of endgame cases has continues. Replicates 5 and 6 are mostly sorted. Paul will do QC checks on those (this will be release 9).	
Special Issues		
Cost as of Oct 18, 2024	*Total Cost to Date (direct + indirect):*	27,264,551.02

Est Cost at Completion (E$AC):			34,958,862.86
Total Budget:			28,919,242.00
Variance (Total Budget minus- E$AC):			-6,039,620.86
Reason for Variance:	Projections have been entered through March 2025 (projection of when we would meet the baseline production goal).		
Projections as of Oct 18, 2024 **Dollars Projected for Month:**			1,217,253.69
Actual Dollars Used:			796,435.25
Variance (Projected minus Actual):			420,818.44
Reason for Variance:	Variance due to projections for training that did not hit. 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:	5,765/3,891	44.2%	2.90
	Estimate at Complete:			
	Variance:			

Other Measures

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

Milestones	**_Pre Production Start:_** 09/01/2023	**_Pretest Start:_**
	Pretest End:	**_Recruitment Start:_**
	Staffing Complete:	**_GIT Start:_**
	SS Train Start:	**_SS Train End:_**
	DC Start: 10/05/2023	**_DC End:_** 02/29/2024

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

Report Period	Sep, 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	N/A	
Cost as of Oct 16, 2024	**_Total Cost to Date (direct + indirect):_**	336,933.93
	Est Cost at Completion (E$AC):	262,847.93

	Total Budget:			505,359.00
	Variance (Total Budget minus- E$AC):			242,511.07
	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 Oct 16, 2024	**Dollars Projected for Month:**			0.00
	Actual Dollars Used:			93.58
	Variance (Projected minus Actual):			-93.58
	Reason for Variance:			

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	2063	54%	N/A
	Goal at Completion:	2063	54%	N/A
	Current Actual:	671	17%	N/A
	Estimate at Complete:	671	17%	N/A
	Variance:	1392	37%	N/A
Other Measures	N/A			

Project Name	**(LHMS 2023 Spring) Life History Mail Study Spring 2023 (On Track)**		
Project Mode	Primary: Mail Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 293,540.00	**Indirect Budget:** 164,382.00	**Total Budget:** 457,922.00
Principal	David Weir (SRC)		
Investigator/Clients	Jaqui Smith (SRC)		
Funding Agency	NIH		
IRB	*HUM#:* HUM00106904		*Period of Approval:* 11/4/2022-11/3/2023
Project Team	*Project Lead:* Gary Hein		
	Budget Analyst: Cindy Tsao		
	Production Manager: William Keating		
	Senior Project Advisor: Evanthia Leissou		
	Production Manager 1:		
	Production Manager 2: William Keating		
Proposal #	no data		
Description	The HRS Life History Mail Survey (LHMS) is part of the Health and Retirement Study. The goal of LHMS is to collect retrospective life histories of HRS participants to address multidisciplinary need for information about events, residential location, and education over the entire life course. Information like this allows researchers to understand how individuals' pasts shape their health and economic situations today. A paper questionnaire will be mailed to a sample of approximately 2,288 HRS Respondents. From this sample, approximately 1,242 completed surveys are expected (54% response rate). For the reminder protocol, 495 respondents have been designated to receive a reminder by postcard. The remaining 1,793 respondents will receive reminders by phone to complete the questionnaire. When a respondent is reached by phone, SRO will attempt to complete the 60-minute interview by telephone. Thank you postcards will be mailed to respondents who return a completed questionnaire.		
SRO Project Period	04/2023 - 12/2023		
Data Col Period	06/2023 - 09/2023		
Security Plan	NA		

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

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

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

Cost as of Oct 16, 2024	Total Cost to Date (direct + indirect):		231,762.64
	Est Cost at Completion (E$AC):		236,457.76
	Total Budget:		457,922.00
	Variance (Total Budget minus- E$AC):		221,464.24
	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 Oct 16, 2024	Dollars Projected for Month:		6,245.17
	Actual Dollars Used:		2,358.31
	Variance (Projected minus Actual):		3,886.86
	Reason for Variance:	Variance due to delay in coding. The data was delivered mid-July to SRO but HRS 2022 coding became a higher priority.	

Measures		Units at Complete	RR	HPI
	Current Goal:	1053	54%	N/A
	Goal at Completion:	1053	54%	N/A
	Current Actual:	358	18%	N/A
	Estimate at Complete:	358	18%	N/A
	Variance:	695	36%	N/A
Other Measures	N/A			

Project Name	**(MI CReSS (Year 3 & 4 & 5)) Michigan COVID-19 Recovery Surveillance Cohort Study (On Track)**
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects
Budget	**Direct Budget**: 792,443.00 **Indirect Budget:** 206,037.00 **Total Budget:** 998,480.00
Principal Investigator/Clients	Nancy Fleischer (U-M School of Public Health (SPH))
Funding Agency	MDHHS - Releases 1 - 8
IRB	***HUM#:*** HUM00234617 **Period of Approval:** 6/15/2023-6/14/2028
Project Team	***Project Lead:*** Timothy Prand
	Budget Analyst: William Lokers
	Production Manager: Lisa J Carn
	Senior Project Advisor: Nicole G Kirgis
	Production Manager 1: Narine Verdiyan
	Production Manager 2:
Proposal #	no data
Description	MI CReSS is a partnership between the University of Michigan School of Public Health (SPH) and the Michigan Department of Health and Human Services. It is a public health surveillance study to learn about Michiganders' experiences with COVID-19 using a representative sample of confirmed cases within the state. Using survey data, they plan to document sociodemographic inequities in COVID-19 testing, treatment, and recovery.
	SRO's involvement includes the administration of a Follow-up survey for respondents that completed a Baseline survey with the SPH team. Based on the sample information provided, we will be re-contacting approximately 3,995 respondents who have already completed (or are estimated) to complete the Baseline survey to administer the Follow-up survey.
	The Follow-up survey is estimated to be 45 minutes in length, and Respondents will be encouraged to complete the survey by web. However, SRO Interviewers will contact non-responders and conduct the interview over the telephone if the Respondents do not want to complete the survey on the web.
	HUM00181068 - Year 3 IRB Exempt - Budget:$841,375 Total used:$649,836
	HUM00234617 - Year 4 - IRB approved - Budget:$477,681
SRO Project Period	08/2021 - 09/2023
Data Col Period	01/2022 - 07/2023
Security Plan	NA

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

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

Report Period	Sep, 2024 (MI CReSS (Year 3 & 4 & 5))	Implementing

Risk Level	On Track

Monthly Updates	Cohort 2
	 - Release 1-8 is complete.
	 - Releases 9-16 launched 4/23/2024 for English and Spanish, 5/15 for Arabic
	     - REL 9 to 14 reminder calling ended
	     - REL 15 reminder calling ends Oct 28 but has already reached a 76% RR
	     - REL 16 reminder calling goes until Nov 18th and currently has a 75% RR
	
	Project debrief is scheduled for Nov 21st
	
	For REL 9 to 16 - 196 completes completed after the TOA increase from $25 to $50

Special Issues	

Cost as of Oct 16, 2024	**Total Cost to Date (direct + indirect):**		822,863.98
	Est Cost at Completion (E$AC):		822,863.98
	Total Budget:		998,480.00
	Variance (Total Budget minus- E$AC):		175,616.02
	Reason for Variance:	Carry Forward from FO1 included and fewer hours spent on the project than projected. This will carry forward to Year 5 F02 and MICReSS Community Surveys	
Projections as of Oct 16, 2024	**Dollars Projected for Month:**		71,291.81
	Actual Dollars Used:		76,260.96
	Variance (Projected minus Actual):		-4,969.15
	Reason for Variance:	This month overrun was due to the timing of respondent payments.	

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	3600	77%	3
	Goal at Completion:	3650	80%	6
	Current Actual:	3600	76.8%	6.0
	Estimate at Complete:	3650	77%	6.5
	Variance:	0	-5%	.5
Other Measures	Targeting 80% of eligible Rs that completed the Main survey to complete the MoCA section in CATI. We are currently at 90% of those who are eligible and agreed to participate. MoCA is currently .69 HPI			

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

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

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

Report Period	Sep, 2024 (MTF Base Year 2022_27)	Implementing
Risk Level	On Track	
Monthly Updates	September 2024
- Five SRO interviewers attended a short training before they began taking steps to recruit first year (new) schools	

for MTF 2025 data collection. Each interviewer was assigned four schools as a starting point. To date all is going well.
- Some early pre production work has begun for the coming year of data collection (beginning early February 2025 with trainings in December this year for TLs and January for Study Proctors (SRO interviewers).

Special Issues

Cost as of Oct 16, 2024	*Total Cost to Date (direct + indirect):*	2,916,402.34
	Est Cost at Completion (E$AC):	7,141,280.64
	Total Budget:	9,778,060.00
	Variance (Total Budget minus- E$AC):	2,636,779.36
	Reason for Variance:	Projections for Funding period 2022 – 2027 (latest client report has been uploaded to MPR) Current projections result in an under spend for the five year grant period. The projected costs are based on completion of 325 schools in years 2024 – 2027 (we were projecting costs for 400 schools) and all in-person. Illume charges have been removed from projections from 2024 onwards. A portion of the hours for work involved in transitioning MTF surveys to Qualtrics are being charged to the Illume recharge account. Primary reason for the under spend and plans for SRO funding: Projections for the five year period are based on current scope of work and the adapted protocol (introduced in 2021). The budget prepared for the proposal was based on the pre-pandemic design. The adapted protocol brings savings in the following categories: interviewer hours, travel, shipping and staff time (specifically hours required for loading and preparing tablets for shipping). For the past few years the number of schools recruited and passed to SRO has been lower than the number used for this budget (n=390). In response, MTF (SRC) have reduced our funding for the first two years. We have received (from MTF) $1,843,080 (Y1) and $1,143,890 (Y2) a total reduction of $815,581. Going forward, the current plan is to fund Year 3 and 4 based on the budgeted amount - if there is significant underspending MTF will reduce SRO's Year 5 award. SRO Finance group feels that we should continue to report/monitor using the original budgeted amount because this is not an official reduction in budget. We are keeping the client (via Nick Prieur) informed of actual and projected spend through a monthly cost report.

Projections as of Oct 16, 2024	*Dollars Projected for Month:*	85,071.67
	Actual Dollars Used:	40,827.45
	Variance (Projected minus Actual):	44,244.22
	Reason for Variance:	Not as many IWER hours were charged in September as projected - this is the first time SRO interviewers have helped recruit schools and hours needed/travel costs and number of schools they would be assigned were all unknowns. We will use the cost data from this year to project more accurately for 2026 recruitment work.

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

Project Name	(MTF Early Panel Pilot) Monitoring the Future: A Cohort-Sequential Panel Study of Drug Use, Ages 19-65 - Administrative Supplement #1 (8/10th Grade Panel) (On Track)		
Project Mode	Primary: Web		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 184,954.00	**Indirect Budget:** 103,575.00	**Total Budget:** 288,529.00
Principal Investigator/Clients	Megan Patrick (ISR, SRC)		
Funding Agency			
IRB	*HUM#:* 00244359		*Period of Approval:*
Project Team	*Project Lead:* Donnalee Ann Grey-Farquharson		
	Budget Analyst: Dean E Stevens		
	Production Manager:		
	Senior Project Advisor: Rebecca Gatward		
	Production Manager 1: Hongyu Johnson		
	Production Manager 2:		
Proposal #	no data		
Description	MTF Early Panel study is a study that will survey drug use in 9th and 11th graders who were 8th and 10th graders in 2023 wave baseline recruited samples. SRO will launch the 2024 and 2025 Web survey data collections with an estimated sample size of 600 cases per wave of data collection. Although originally proposed, no reminder calling will be carried out on the early panel sample. This budget assumes an overall SRO involvement period of 20 months commencing in March 2024 with the data collections taking place during a 4-month period (for each wave), beginning in May 2024 (for Wave 1) and May 2025 (for Wave 2).		
SRO Project Period	07/2023 - 12/2025		
Data Col Period	04/2024 - 08/2025		
Security Plan	NA		

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

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

Report Period	Sep, 2024 (MTF Early Panel Pilot)	Implementing
Risk Level	On Track	
Monthly Updates	We had minimum activities during September. The total completes is 26 cases, we received 13 parental consents; of those, one survey is in progress and 12 cases have not started the surveys.	

Special Issues		
Cost as of Sep 30, 2024	*Total Cost to Date (direct + indirect):*	112,019.70
	Est Cost at Completion (E$AC):	270,146.06

	Total Budget:		288,529.00
	Variance (Total Budget minus- E$AC):		18,382.94
	Reason for Variance:	The underrun has reduced since August due to regular staff salary new rates took effect in September as well as staff reduced hours to support another project that will be from August through March 2025. We will make adjustments in the next few months.	
Projections as of Sep 30, 2024	Dollars Projected for Month:		12,814.90
	Actual Dollars Used:		12,045.97
	Variance (Projected minus Actual):		768.93
	Reason for Variance:	The actual spending amount is very close to the projected amount.	

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

Project Name	(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027 (On Track)		
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 2,496,935.00	**Indirect Budget:** 1,398,282.00	**Total Budget:** 3,895,217.00
Principal Investigator/Clients	Megan Patrick (UM-SRC)		
Funding Agency			
IRB	**HUM#:** 00217920		**Period of Approval:**
Project Team	**Project Lead:** Donnalee Ann Grey-Farquharson		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lloyd Fate Hemingway		
	Senior Project Advisor: Rebecca Gatward		
	Production Manager 1:		
	Production Manager 2: Hongyu Johnson		
Proposal #	no data		
Description	Since 1975 the MTF survey has measured drug and alcohol use and related attitudes among adolescent students nationwide. A nationally representative sample of survey participants report their drug use behaviors across three time periods: lifetime, past year, and past month. The survey is funded by the NIDA, a component of the National Institutes of Health (NIH), and conducted by the University of Michigan. MTF has two linked projects, MTF Main surveys students in schools, and MTF Panel surveys adults across the lifespan. MTF Panel conducts data collection between April and October each year. In 2024 MTF moved from DatStat.Illume web surveys to Qualtrics. Each year over 20,000 participants are invited to complete a survey with push-to-web followed by paper survey modes. Invitations are mailed in April. Non-response calling begins in May and runs through August. Several hard copy and email reminders are sent throughout the data collection window. Both the separately funded Winter Location calling effort and Non-Response follow-up calling will be integrated with the standard MTF activities. Panel participants are sent study newsletters each year in December. Participants whose newsletter is returned undeliverable by the USPS are sent for location calling Mid-January through February.		
SRO Project Period	01/2022 - 03/2027		
Data Col Period	04/2022 - 10/2026		
Security Plan	NA		

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

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

Report Period	Sep, 2024 (MTF Panel 2022-27)	Implementing
Risk Level	On Track	
Monthly Updates	We had minimal activities during September. We updated the schedules in WebSMS for extending the data collection until Oct 25, 2024. As of 9/30/2024, we had RR of 45.62%.	
Special Issues		
Cost as of Sep 30, 2024	*Total Cost to Date (direct + indirect):*	1,939,758.99

	Est Cost at Completion (E$AC):			4,064,131.40
	Total Budget:			3,895,217.00
	Variance (Total Budget minus- E$AC):			-168,914.40
	Reason for Variance:	Staff salary increased rates took effect in September and increased the overrun slightly. MTF Staff is aware of the deficit - this information is included the monthly report they receive from SRO.		
Projections as of Sep 30, 2024	**Dollars Projected for Month:**			48,573.57
	Actual Dollars Used:			30,089.30
	Variance (Projected minus Actual):			18,484.27
	Reason for Variance:	Hours charged were lower than projected.		

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

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

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

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

Report Period	Sep, 2024 (NDWS)	Implementing
Risk Level	Some Concerns	
Monthly Updates	September activities: * In addition to launching nursing home, assisted living (RTI) , and home care surveys (DLH), RTI sent initial mailed invitation to the community clinicians web survey. Initial mailing yielded closed to 500 completes and the SRO team analyzed the first n ~ 100 for internal validity and dataset formats. All checks passed and the clinicians	

data collection will continue with a series of email and mailed reminders.
* Four weeks after the launch of data collection, the yields for the nursing home, assisted living, and home care administrator surveys are meager. RTI recruited only 2 of 200 AL and 3 of 200 NH facilities and DLH so far has not recruited any HC facilities despite the energetic outreach protocol. Issues encountered are lack of interest, pick-up hangups, and AL facilities not eligible / not caring for patients living with dementia.
* To aid contact strategies, SRO started exploring additional ways of getting more information about the facilities (i.e. facility tracing) using Dun and Bradstreet or Compustat. This seems to be a new component critical to add in the context of establishment surveys.
* Members of NDWS team who are experienced with approaching AL, NH, and HC organizations for research purposes recognize the same difficulties and are not surprised by the low yields. At the same time, there is a concern that higher production level will be expected by NIA and should be expected from the data collection partners. To address NDWS team concerns about low yields, SRO and PIs are facilitating partner's response to those concerns. We are securing additional information and data to diagnose the issues and brainstorm immediate and long-term protocol adaptations to increase production.
* We are gearing up for end of Y1 and Y2 IRB submissions which will include some of the protocol adaptations and best strategies for Y2 data collection (March - August 2025).
* We started receiving production and continue refining the consolidated Google Sheet report shared with the NDWS team. We continue working with our data collection partners to build a reporting suite to provide weekly reports and dashboards to the broader team.
* Year 2 sample frame development is proceeding as planned. Most of AL facility list development has been completed and we are finalizing work on HC (sample for NH and CC being provided by our partner Mathematica). Our approach to building facility list home care agencies, including working with the PIs and experts on studying health care workforce to help us with approaches to identifying home care agencies.
* The design of Year 2 surveys and associated cognitive interviews are on schedule and will kick-off early in October.

Special Issues	Concerns about the pace of data collection are being discussed within the NDWS team and are being reported by PIs to NIA.	
Cost as of Oct 01, 2024	*Total Cost to Date (direct + indirect):*	558,047.46
	Est Cost at Completion (E$AC):	4,878,415.73
	Total Budget:	6,750,973.00
	Variance (Total Budget minus- E$AC):	1,872,557.27
	Reason for Variance:	
Projections as of Oct 01, 2024	*Dollars Projected for Month:*	132,448.42
	Actual Dollars Used:	81,598.92
	Variance (Projected minus Actual):	50,849.50
	Reason for Variance:	

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

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

Milestones			
Pre Production Start: 10/01/2021		*Pretest Start:* 02/05/2024	
Pretest End: 03/11/2024		*Recruitment Start:*	
Staffing Complete:		*GIT Start:* 01/30/2024	
SS Train Start: 01/31/2024		*SS Train End:* 02/02/2024	
DC Start:		*DC End:*	

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

Report Period	Sep, 2024 (PR-PSID)	Implementing
Risk Level	Some Concerns	
Monthly Updates	SRO continued to make progress on pretest data out. SRO will need guidance from PSID data processing staff on next steps. SRO provided PIs with draft five-year budget for the Americorps funding. SRO and PIs discussed the CS and Questionnaire modifications that will be needed for the baseline wave of PR-PSID. PIs will review all of the Core25 modifications to confirm whether they should also be incorporated into the PR-PSID instrument.	

Blaise programming has not started yet -- awaiting response from PIs regarding Blaise modifications.

Sampling work has not yet begun -- PR-PSID sample selection will occur in October.

Special Issues	Same as last month -- overrun and uncertainty around PCP work scope which is new to SRO.	
Cost as of Oct 08, 2024	*Total Cost to Date (direct + indirect):*	617,129.31
	Est Cost at Completion (E$AC):	1,511,199.12
	Total Budget:	1,292,585.00
	Variance (Total Budget minus- E$AC):	-218,614.12
	Reason for Variance:	Cost Report values are not final -- projections have not yet been updated.
Projections as of Oct 08, 2024	*Dollars Projected for Month:*	9,238.72
	Actual Dollars Used:	5,992.26
	Variance (Projected minus Actual):	3,246.46
	Reason for Variance:	DMSS hours for samplings projected for September were not charged. Hours will be pushed forward.

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

Other Measures

Total Cost to Date (direct + indirect):	617,129.31
Est Cost at Completion (E$AC):	1,511,199.12
Total Budget:	1,292,585.00

Project Name	**(PSID 2025 OCU) PSID 2025 Online Contact Update (On Track)**
Project Mode	Primary: Web Secondary: Mail Total of Modes: 2
Project Type	Sponsored Projects
Budget	**Direct Budget**: 52,360.00 **Indirect Budget:** 29,326.00 **Total Budget:** 81,686.00
Principal	Katherine McGonagle (PSID)
Investigator/Clients	Noura Insolera (PSID)
Funding Agency	NSF
IRB	**HUM#:** HUM00062417 **Period of Approval:**
Project Team	**Project Lead:** Camila Kendall
	Budget Analyst: Ivanna Iavorska-Em
	Production Manager:
	Senior Project Advisor: Stephanie A Chardoul
	Production Manager 1:
	Production Manager 2:
Proposal #	no data
Description	SRO will update the Blaise and MSMS specifications from 2022 and program and test a Blaise 5 web instrument and web portal with authentication that allows PSID and TAS respondents to confirm or update their contact information via an online survey. SRO will provide PSID authenticated links so that they can merge QR codes that will be embedded in a mailing sent to the respondents. SRO will also program and send the respondents up to three email reminders with an authenticated link. This project is under the PSID Core IRB.
SRO Project Period	04/2024 - 05/2025
Data Col Period	07/2024 - 12/2024
Security Plan	NA

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

Other Project Team Members	Shonda Kruger-Ndiaye -- PSID Suite Lead Rachel Orlowski -- PSID Survey Director Daric Throne -- MSMS Spec Lead James Rodgers -- MSMS Lead Karl Dinkelmann -- Blaise Lead Jeffrey Smith -- TSG Lead Jude Perillo -- Blaise Programmer Darnell Christian -- MSMS Set Up Programmer Edward Green -- Data Manager Rose Zdybel -- Data Management Support Laura Yoder -- Archiving Ivanna Iavorska-Em -- Financial Analyst
Other Project Name	
Sample Mgmt System	MSMS
Data Col Tool	Blaise 5
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, R
Administration	ISR Group (PSID)
Payment Type	Check, post ($10); Other (electronic, post--JP Morgan)
Payment Method	NA

Report Period	Sep, 2024 (PSID 2025 OCU)	Implementing
Risk Level	On Track	
Monthly Updates	PSID Provided the batch 2 (n=1784) preload on 9/7. SRO prepared the preload the loaded the sample on 9/13. All of the batch 2 cards were mailed on 9/18. Confirmed date for first email reminder -- October 9th. 899 Web completes as of 10/1.	

Special Issues

Cost as of Oct 09, 2024	*Total Cost to Date (direct + indirect):*		63,763.14
	Est Cost at Completion (E$AC):		81,214.40
	Total Budget:		81,686.00
	Variance (Total Budget minus- E$AC):		471.60
	Reason for Variance:	Cost report values are not final -- projections have not been updated yet	
Projections as of Oct 09, 2024	*Dollars Projected for Month:*		7,254.27
	Actual Dollars Used:		5,655.45
	Variance (Projected minus Actual):		1,598.82
	Reason for Variance:	Actuals for management were lower than projected.	

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

Other Measures

Project Name	**(PSID CDS 2023) PSID Childhood Development Supplement 2023 (On Track)**
Project Mode	Primary: Mixed Secondary: Face to Face Total of Modes: 4
Project Type	Sponsored Projects
Budget	**Direct Budget**: 3,050,535.57 **Indirect Budget:** 1,705,467.00 **Total Budget:** 4,756,002.57
Principal Investigator/Clients	Narayan Sastry (SRC)
Funding Agency	
IRB	*HUM#:* HUM00166316 *Period of Approval:*
Project Team	*Project Lead:* Piotr Dworak
	Budget Analyst: Ivanna Iavorska-Em
	Production Manager: Sarah Crane
	Senior Project Advisor: Stephanie A Chardoul
	Production Manager 1:
	Production Manager 2:
Proposal #	no data
Description	A 2023 wave of the Childhood Development Supplement (CDS) is going to be conducted in two phases. Phase 1: from September 2023 – May 2024 and Phase 2: from June 2024 - January 2025. The sample for CDS is comprised of the PSID-eligible children (ages 0 -17) from the Core 2023 families we interview and their primary caregivers. Approximately 3,700 families will be included, with some Core families containing several CDS children. As part of the CDS Phase 1, families are asked to complete phone coverscreen and PCG interviews followed by mixed Adolescent 12 - 17 phone/web interview (including an IVR component in phone mode). In Phase 2 families will be visited in person (where possible) and asked to complete Child 8 - 11 interviews (via Video if out of area), provide physical measurements, educational assessments, saliva collection, time diaries, school and birth record linkage forms. CDS interviewing will be conducted by a mix of SSL and Field interviewers. Coverscreen and PCG interviews will be handled by SurveyTrak and Blaise 4.8, Adolescent interviews will be handled by MSMS and Blaise 5.
SRO Project Period	08/2022 - 01/2025
Data Col Period	09/2023 - 01/2025
Security Plan	NA

Milestones		
Pre Production Start: 10/01/2022		*Pretest Start:* 04/24/2023
Pretest End: 05/14/2023		*Recruitment Start:* 07/01/2023
Staffing Complete: 09/01/2023		*GIT Start:* 12/12/1999
SS Train Start: 01/18/2024		*SS Train End:* 01/22/2024
DC Start: 01/22/2024		*DC End:* 10/27/2024

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

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

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

CDS Phase 1 data collection is in week 38. We completed Coverscreen and PCG interviews (on October 13) and are now focusing on maximizing Adolescent response rate (scheduled to end on October 27th with a one-week extension for the Phone Only treatment group).

Our current goals and progress:
-- CS: ended on 9-8 completing 2,556 interviews and achieving 80.1% response rate.
-- PCG: ended on 10-13 completing 2304 interviews and achieving 90.4% response rate.
-- Adolescent: completed 1108 interviews and need another 50 to achieve similar response rate to CDS-21.

Data Collection Staff:
Our iwer staff has been consolidated but we have retained 30 personnel of whom 19 also work on Phase 2.

Special Issues			
Cost as of Oct 16, 2024	*Total Cost to Date (direct + indirect):*		3,603,053.66
	Est Cost at Completion (E$AC):		3,992,888.86
	Total Budget:		4,756,002.57
	Variance (Total Budget minus- E$AC):		763,113.71
	Reason for Variance:	Projections have been updated through the end of the project and we expect the current underrun to hold.	
Projections as of Oct 16, 2024	*Dollars Projected for Month:*		224,585.39
	Actual Dollars Used:		260,815.34
	Variance (Projected minus Actual):		-36,229.95
	Reason for Variance:	We were able to secure more iwer hours to finish PCG and Adolescent data collection.	

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

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

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

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

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

Report Period	Sep, 2024 (PSID CDS23 Phase 2)	Implementing
Risk Level	On Track	
Monthly Updates	Field interviewer trainings held on 9/16 (CDS Phase 2 Overview) and 9/26 (CDS Phase 2 SurveyTrak & Field Procedures). SRO worked with PSID payment staff to identify the PCGs that have been paid $400 or more during 2024 across the PSID suite of projects. SRO identified the maximum amount that the PCGs could be paid during CDS phase 2, and came up with list of PCGs that are at risk of being paid between $400-$600 during 2024 if all of the CDS Phase 2 payments (including payments for minor's saliva) are issued to the PCG. 54 cases were identified in batch 1 sample, and 17 cases in batch 2 sample. A plan was developed to ensure that CDS phase 2 payments for children's saliva are issued to the minor, so that the payments do not count towards these PCG's total. CDS Managers and PI met with the business office to discuss these payment cases and the plan CDS had developed. Next steps -- Business office will speak with HSIP office on CDS's behalf and confirm that we can refrain from collecting SSNs as long as we can ensure that the PCG will not be paid over $600. These cases are		

being held until we hear back from the business office.

Funding became available in the Tango account on 9/20. Project tested & signed off on the Qualtrics/Tango integration on 9/26. Rel 1 (n=172) prenotification letters were sent out on 9/27. First batch email/texts sent on 9/30.

Rel 1 Kits were assembled 10/1-10/3. IWER outreach began on 10/4. Sample will be released on weekly basis, until all of the batch 1 and 2 sample has been released.

Logging training held on 9/30. Loggers are the same Survey Techs that are staffed on assembly. Logging shifts began on 10/10.

Special Issues				
Cost as of Oct 14, 2024	***Total Cost to Date (direct + indirect):***			339,655.20
	Est Cost at Completion (E$AC):			1,649,157.20
	Total Budget:			2,524,678.00
	Variance (Total Budget minus- E$AC):			875,520.80
	Reason for Variance:	Projections have not been updated yet.		
Projections as of Oct 14, 2024	***Dollars Projected for Month:***			247,303.41
	Actual Dollars Used:			141,987.12
	Variance (Projected minus Actual):			105,316.29
	Reason for Variance:	Underrun mainly due to postage, laboratory supplies, and survey tech time projected in September that will hit in Oct. Projections will be moved forward.		

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

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

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

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

Report Period	Sep, 2024 (PSID TAS 2023)	Closing
Risk Level	On Track	
Monthly Updates	September Project Updates The project team continues to follow up with a few cases where a token of appreciation is sent but mailing token returned as undeliverable. TSG staff completed the final project project archiving. Occupation and Industry coding complete and delivered to the PI study team. Delivery took place 1-month ahead of schedule.	

Special Issues

Cost as of Oct 16, 2024	*Total Cost to Date (direct + indirect):*	1,360,850.08
	Est Cost at Completion (E$AC):	1,365,534.63
	Total Budget:	1,457,428.00
	Variance (Total Budget minus- E$AC):	91,893.37
	Reason for Variance:	The biggest driver of this reduction is due to fewer hours needed across tech and management categories.
Projections as of Oct 16, 2024	*Dollars Projected for Month:*	11,202.00
	Actual Dollars Used:	10,210.39
	Variance (Projected minus Actual):	991.61
	Reason for Variance:	The biggest driver of this decrease was due to less hours worked for the SSI and Project Associate Management categories.

Measures		Units at Complete	RR	HPI
	Current Goal:	2449	89%	3.6
	Goal at Completion:		89%	
	Current Actual:	2449	89%	3.5
	Estimate at Complete:	2449	89%	3.6
	Variance:			

Other Measures

Project Name	**(PSID23) Panel Study of Income Dynamics Core 2023 (On Track)**		
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 6,235,802.00	**Indirect Budget:** 0.00	**Total Budget:** 6,235,802.00
Principal	Katherine McGonagle (UM-SRC-PSID)		
Investigator/Clients	Narayan Sastry (UM-SRC-PSID)		
	Esther Friedman (UM-SRC-PSID)		
Funding Agency			
IRB	***HUM#:*** HUM00062417		***Period of Approval:*** 3/22/22-3/21/24
Project Team	***Project Lead:*** Rachel Anne Orlowski		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager: Stacy Quisenberry		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Daric Thorne		
	Production Manager 2: Shonda R Kruger-Ndiaye		
Proposal #	no data		
Description	The Panel Study of Income Dynamics (PSID--also known to Respondents as the Family Economics Study or FES) is a longitudinal survey of several thousand individuals and their families, carried out since 1968 and conducted every two years. The sample is comprised of respondents from the 4,800 original families as well as new (immigrant) sample added in 1997/1999 and 2017/2019. The total 2023 sample size will be approx. 11,200, with approx. 9,650 completed interviews expected. Most of the information collected is about family composition and changes (marriages, divorces, births, deaths, people moving in and out); income sources and amounts; employment and pensions; and wealth. There are also questions about housing; education; vehicles; health; fertility; COVID-19; and money spent on food, healthcare, and school. The main focus is on how these family composition and financial factors interact with each other and how they change over time. The survey will be administered via web and telephone, with the expectation that more surveys will be completed via web than telephone (which will be a first for the study). During the 2023 wave, saliva samples will be collected for the first time on PSID Core. The Core interview must be completed to be eligible for saliva collection. Saliva sample participants that are eligible for collection during Core are adults related to Child Development Supplement (CDS) children but do not live with them. Interviewers will be trained on both the interview and saliva collection protocols. Both data collection efforts will be managed in the same MSMS project. The 2023 waves of CDS and the Transition into Adulthood (TAS) will follow PSID Core data collection. CDS and TAS eligibility is dependent upon completion of PSID Core.		
SRO Project Period	03/2022 - 09/2024		
Data Col Period	03/2023 - 04/2024		
Security Plan	NA		

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

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

Report Period	Sep, 2024 (PSID23)	Implementing
Risk Level	On Track	
Monthly Updates	Summary of September 2024 Activities Saliva Collection On 9/4, continued discussion with PIs, PSID staff, and SRO staff (including DMSS) regarding sample eligibility, data definitions, and protocol decisions. SRO recoded cases based on this discussion and redelivered data in mid-September Preparing to close the project at SRO--including inventorying supplies.	
Special Issues	Saliva data collection (including FTF visits) started later than originally planned. Saliva RR short of budgeted target (44%).	

Cost as of Oct 09, 2024	*Total Cost to Date (direct + indirect):*	5,677,770.83
	Est Cost at Completion (E$AC):	5,680,269.47
	Total Budget:	6,235,802.00
	Variance (Total Budget minus- E$AC):	555,532.53
	Reason for Variance:	OCTOBER 2024 PROJECTION UPDATES HAVE NOT BEEN MADE YET. 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 Oct 09, 2024	*Dollars Projected for Month:*	12,719.14
	Actual Dollars Used:	12,358.67
	Variance (Projected minus Actual):	360.47
	Reason for Variance:	OCTOBER 2024 PROJECTION UPDATES HAVE NOT BEEN MADE YET. Note: Unable to separate Core IDC costs from Contact Update IDC costs. Cost values only reflect Direct Costs.

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

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

Project Name	**(PSID25) Panel Study of Income Dynamics Core 2025 (On Track)**		
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 5,003,388.00	**Indirect Budget:** 2,801,897.00	**Total Budget:** 7,805,285.00
Principal	Tom Crossley (UM-SRC-PSID)		
Investigator/Clients	Katherine McGonagle (UM-SRC-PSID)		
	Narayan Sastry (UM-SRC-PSID)		
Funding Agency	NSF, NIA, NICHD		
IRB	**HUM#:** HUM00062417		**Period of Approval:**
Project Team	**Project Lead:** Rachel Anne Orlowski		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager: Stacy Quisenberry		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Maureen Joan O'Brien		
	Production Manager 2: Daric Thorne		
Proposal #	no data		
Description	The Panel Study of Income Dynamics (PSID--also known to Respondents as the Family Economics Study or FES) is a longitudinal survey of several thousand individuals and their families, carried out since 1968 and conducted every two years. The sample is comprised of respondents from the 4,800 original families as well as new (immigrant) sample added in 1997/1999 and 2017/2019. The total 2025 sample size will be approx. 11,200, with approx. 10,000 completed interviews expected. Most of the information collected is about family composition and changes (marriages, divorces, births, deaths, people moving in and out); income sources and amounts; employment and pensions; and wealth. There are also questions about housing; education; vehicles; health; fertility; COVID-19; and money spent on food, healthcare, and school. The main focus is on how these family composition and financial factors interact with each other and how they change over time. The survey will be administered via web and telephone, with the expectation that more surveys will be completed via web than telephone. Talk about ancillary studies here. The 2023 waves of CDS and the Transition into Adulthood (TAS) will follow PSID Core data collection. CDS and TAS eligibility is dependent upon completion of PSID Core.		
SRO Project Period	03/2024 - 09/2026		
Data Col Period	03/2025 - 03/2025		
Security Plan	NA		

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

Other Project Team Members	TSG Tech Leads - Jim Rodgers, Jeff Smith, & Karl Dinkelmann; Data Manager - Brad Goodwin & Ed Green; 68ID Site Programmer - Ashwin Dey; Blaise Programmer - Jude Perillo; MSMS Programmers - Pam Swanson & Darnell Christian; Help Desk - David Bolt & Kyle Goodman; Tech Support - Sarah Broumand & Jaime Koopman; Production Support: Lorraine Bird; Project Support - Saujanya Acharya, Janet McBride, & Xiomara Lorenzo-Guerra; Reporting, Mapping, & Sample Assignment - Ji Qi & Wen Chang
Other Project Name	FES, Family Economic Study, PSID Core 2025
Sample Mgmt System	MSMS; Project specific system (68ID Site)
Data Col Tool	Blaise 5
Hardware	Laptop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	Camtasia
Incentive	Yes, R; Yes, Other (Locator, Proxy)
Administration	ISR Group (PSID)
Payment Type	Check, post (Varies); Cash, post (Varies); Other (electronic, post--JP Morgan)
Payment Method	Check through other system (PSID will handle check & e-payment via RAPS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (PSID will handle check & e-payment via RAPS)

Report Period	Sep, 2024 (PSID25)	Implementing
Risk Level	On Track	
Monthly Updates	Summary of September 2024 Activities:	

PI Updates:
SRO and PSID continued to work on finalizing the 2025 sample release schedule.

IRB:
On 9/3, a PSID Core and CDS respondent contacted RCT and the IRB. The R previously contact RCT and the IRB expressing uncertainty about what Health Sciences and Behavioral Sciences is. SRO has reached out to this R previously. The recent concerns are about how the study has negatively impacted their life and how they may have participated without consenting. The IRB spoke to the R on 9/3. On 9/16, Core and CDS provided the IRB with documentation that consent protocols were followed. The R wanted to speaked with Narayan, so Narayan and CCP (Maureen) made numerous attempts to reach the R but were unsuccessful.

Technical Updates:

MSMS -
Management staff worked on refining and specifying new workflows that were not part of Pretest.

Blaise -
Pretest interviewers were instructed to enter F2 notes, so we could perform a more extensive test of FPS. FPS collected during Pretest appeared as expected. The mobile web template needed to be updated during Pretest Production. PSID staff focused on small device and FPS testing while awaiting changes from Pretest. On 9/17, Spanish CTT kicked off -- focusing first on CATI then web. On 9/30, SRO and PSID staff met to discuss Tango card Blaise integration -- learning from MTF's Qualtrics experience; the PIs later decided to postpone experimentation until after Core launches.

68-ID Site -
TSG changed programming and oversight assignments in order to get 68ID Site development back on schedule.

Reports -
TSG revised a couple of standard reports that were not working as expected for Pretest. The tech team released Pretest PQT. DMSS worked on requested revisions to project-specific reports.

Pretest Production:
Pretest Prod Data Test concluded by 9/6. The Pretest Production period was 9/16 - 10/6. The goal was to administer 90-100 interviews from 117 potential respondents. This Pretest included splitoff interviews and a web special offer for the first time.

Recruitment:
Using the new sample release schedule for 2025 Production, managers estimated the interviewer effort needed across the production period. DCO worked on on staff postings.

Training:
Pretest Production Training was held September 9th, 10th, 12th, and 13th, with HOPS on Wednesday, September 11.
There will be three Core Production Trainings. The first two trainings' dates have been proposed and approved. T1 will begin on 2/24/25, and T2 will begin on 4/14. T1 and T2 trainings will be ½ days, weekdays only. Both T1 and T2 trainings will include technical systems training, family listing, and the Core interview. T1 will include 3-4 Iwers and 7-8 TLs, and T2 will include approximately 35 Iwers. Both trainings will include OSers only. The T3 training dates are still under review. T3 likely will be in-person and include NHs. Systems training will come first, and family listing/interviewer training will likely be held at a later date via Zoom. The team is working toward finalizing the February training agenda and has identified topics for training videos.

Special Issues		
Cost as of Oct 16, 2024	**Total Cost to Date (direct + indirect):**	666,648.80
	Est Cost at Completion (E$AC):	8,223,852.33
	Total Budget:	7,805,285.00
	Variance (Total Budget minus- E$AC):	-418,567.33
	Reason for Variance:	OCTOBER 2024 PROJECTION UPDATES HAVE NOT BEEN MADE YET. Nearly all of the overrun is explained by projecting at a higher rate than budgeted for interviewers and survey specialists/directors. Designing data collection and training differently than budgeted -- currently estimating the impact on interviewer hours, expected to lower the interviewer effort needed. Looking for ways to streamline effort, including by expanding technical capabilities.
Projections as of Oct 16, 2024	**Dollars Projected for Month:**	182,333.27
	Actual Dollars Used:	143,574.67
	Variance (Projected minus Actual):	38,758.60
	Reason for Variance:	OCTOBER 2024 PROJECTION UPDATES HAVE NOT BEEN MADE YET.

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.

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:			

Project Name	(SAND COVID Follow-Up) Study of Adolescent to Adult Neural Development (SAND) COVID-19 Follow-up Study (On Track)		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 141,021.00	**Indirect Budget:** 78,973.00	**Total Budget:** 219,994.00
Principal	Colter Mitchell (U-M, SRC)		
Investigator/Clients	Helen Meier (U-M, SRC)		
Funding Agency			
IRB	*HUM#:* 00246902		*Period of Approval:*
Project Team	*Project Lead:* Elizabeth Ohryn		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lisa J Carn		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1: Narine Verdiyan		
	Production Manager 2:		
Proposal #	no data		
Description	The Study of Adolescent to Adult Neural Development (SAND) COVID follow-up study is a supplement of the Future of Families Child Wellbeing Study (FFCWS). FFCWS is a longitudinal research project that follows a cohort of nearly 5,000 children born in large U.S. cities in either 1998 or 2000. The study focuses on the influence of social and economic conditions in tandem with the capabilities of parents, the well-being of children, and the policies affecting disadvantaged families. SAND Neuroimaging is a supplement study to the FFCWS. The purpose of SAND Neuroimaging is to learn more about how childhood environments shape brain development and behavior from adolescence into young adulthood. Once child participants reached age 15, the study conducted MRIs and behavioral and psychological assessments. Neuroimaging takes place at regular intervals into adulthood. These assessments help in correlating brain development with cognitive abilities, emotional regulation, social skills, and other important functions.

As a result of the COVID-19 pandemic, and because in-person neuroimaging was no longer an option, the FFCWS launched another study, SAND COVID-19, in 2020. The aim of this study is to gather information on familial pairs of young adults (YA) and their parent/primary caregivers (PCG) on how the COVID-19 pandemic impacted their families, households, and communities.

Now, four years later, this project is conducting another wave called SAND COVID-19 Follow-up, to which SRO is contributing. This project seeks to gather self-administered Qualtrics interviews from young adult and former caregiver respondents. SRO's role is in encouraging respondents' web completions via a contact protocol including email, text, and phone reminders. If needed, we may take several additional steps to locate our sample individuals including in-depth and batch locating using a paid service such as Accurint. | | |
SRO Project Period	05/2024 - 11/2024		
Data Col Period	08/2024 - 10/2024		
Security Plan	NA		

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

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

Report Period	Sep, 2024 (SAND COVID Follow-Up)	Initiation
Risk Level	On Track	

Monthly Updates	September Update
	Data Collection
	- Production has slowed since the strong start in August. While the project ended the month with a solid 895 interviews and a 36% response rate the average weekly completes for this month are tracking at 57 a week compared to 153 in August.
	- This month's interventions included finishing up with the first non-response call, a batch sent email, iwer sent text messages, and a second call. The largest peaks of production are when emails and text messages are sent.
	- The project continues to have a large locating load with 27% of all sample in locating. Locators are focused on database searches and preload documents provided by the study team. Interviewers are helping the locating effort by following up with generated locating leads. The project team continues to monitor the best methods for locating.
	- There is currently no interviewer attrition.
	Data Management / Technical
	- Templates and data pulls needed to create and send batch emails.
	- Blaise scripts are being run to help id progress for non-response calling and locating. These outputs are put into an txt file that can be added to an Excel for easier review, sorting, and filtering.
	- The development of the project FPR remains in process.
	Management Team
	- Considerations for updates to the study protocols are needed in response of the project's response rate. While the initial SRO proposal and study plan were based on a capped outreach effort to Rs. The PI team is interested in SRO suggested adjustments to help boost completes.
Special Issues	Expired Survey Links: In mid-September, the project began experiencing an influx of Rs indicating their web link has expired. The Study Staff completed an additional review and found that the survey link expired after 6 weeks when a case was suspended. This expiration was adjusted so that links are not suspended at any point until the survey is no longer active.
	Tango and Payments: SAND COVID continues to receive outreach from Rs who have either not received their payment link or need a new one. The PI staff works on re-submissions with Tango and SRO communicates with R to R concerns about receiving their TOA.

Cost as of Oct 16, 2024	Total Cost to Date (direct + indirect):	138,732.90
	Est Cost at Completion (E$AC):	2,193,989.20
	Total Budget:	219,994.00
	Variance (Total Budget minus- E$AC):	4.80
	Reason for Variance:	Actual costs are expected to match closely to the estimated cost to complete.

Projections as of Oct 16, 2024	Dollars Projected for Month:	64,299.78
	Actual Dollars Used:	56,990.73
	Variance (Projected minus Actual):	7,309.05
	Reason for Variance:	Fewer interviewer hours worked in the prior month than projected.

Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:	895	36%	
	Estimate at Complete:			
	Variance:			

Other Measures

Project Name	**(SCA 2024) Surveys of Consumer Attitudes (On Track)**		
Project Mode	Primary: Mail Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 696,383.00	**Indirect Budget**: 0.00	**Total Budget:** 696,383.00
Principal			
Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* William Keating		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lisa J Carn		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations. The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 600 interviews.		
SRO Project Period	01/2024 - 06/2024		
Data Col Period			
Security Plan	NA		

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

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

Report Period	Sep, 2024 (SCA 2024)	Closing
Risk Level	On Track	
Monthly Updates	All SRO work on this project has concluded except for final archiving activities, planned to occur in October 2024.	
Special Issues		
Cost as of Oct 16, 2024	*Total Cost to Date (direct + indirect):*	679,625.12
	Est Cost at Completion (E$AC):	680,128.76
	Total Budget:	696,383.00
	Variance (Total Budget minus- E$AC):	16,254.24
	Reason for Variance:	The overall variance for the project decreased from the August to September calendar months. The decrease was caused by archiving activities, a total of six hours, hitting during the September calendar month. The hours were not projected during the September study

month.

Projections as of Oct 16, 2024	Dollars Projected for Month:		0.00
	Actual Dollars Used:		862.08
	Variance (Projected minus Actual):		-862.08
	Reason for Variance:	The variance for the September calendar month can be attributed to the same archiving activities and hours that impacted the overall variance for the cost of the project. Six hours were utilized to archive some of the project reporting systems used during production.	

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

Other Measures

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

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

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

Report Period	Sep, 2024 (SCA Web)	Closing
Risk Level	On Track	
Monthly Updates	The coding team completed 1,162 cases during September 2024. 116 of those cases were recoded for IRR purposes. IRR fell within expected ranges across the project.	
Special Issues		
Cost as of Oct 18, 2024	*Total Cost to Date (direct + indirect):*	6,954.68
	Est Cost at Completion (E$AC):	52,994.44
	Total Budget:	50,730.00

	Variance (Total Budget minus- E$AC):			2,264.44
	Reason for Variance:	Projections were increased for programmers in July 2024, but actual hours during September 2024 were lower than anticipated for one of the analysts and senior programmers staffed on the project.		
Projections as of Oct 18, 2024	*Dollars Projected for Month:*			10,597.84
	Actual Dollars Used:			6,954.68
	Variance (Projected minus Actual):			3,643.16
	Reason for Variance:	Less hours worked than projected. Specifically, less time from Dave Dybicki due to his impending retirement.		

Measures

		Units at Complete	**RR**	**HPI**
	Current Goal:	N/A	N/A	N/A
	Goal at Completion:	N/A	N/A	N/A
	Current Actual:	N/A	N/A	N/A
	Estimate at Complete:			
	Variance:			

Other Measures

Project Name	**(SCIP 2024) Sustainability Cultural Indicators Project (On Track)**
Project Mode	Primary: Web Total of Modes: 1
Project Type	Sponsored Projects
Budget	**Direct Budget**: 137,834.00 **Indirect Budget:** 0.00 **Total Budget:** 137,834.00
Principal	John Callewaert, Co-PI (SRC, College of Engineering)
Investigator/Clients	Robert Marans, Co-PI (SRC)
	Noah Webster, Co-PI (SRC)
Funding Agency	U-M
IRB	***HUM#:*** HUM00260230 ***Period of Approval:***
Project Team	***Project Lead:*** Donnalee Ann Grey-Farquharson
	Budget Analyst: David Kellermeyer
	Production Manager:
	Senior Project Advisor: Shonda R Kruger-Ndiaye
	Production Manager 1: James Koopman
	Production Manager 2: Hongyu Johnson
Proposal #	no data
Description	SCIP 2024 is the 7th wave of the project since its inception in 2012. The SCIP (Sustainability Cultural Indicators Project) is a multi-year project designed to measure and track the culture of sustainability, originally on the U-M Ann Arbor campus. In Fall 2021, SCIP expanded to include the U-M Flint and U-M Dearborn campuses, making Fall 2021 the most recent wave of the project. For the 2024 data collection, SRO will continue to use Qualtrics software for the web survey instrument. The basic sampling and methodological design of the project will be similar to that of the 2021 wave. For all three campuses the sample will include freshmen, sophomore, juniors, seniors and graduate students, as well as faculty and staff. In addition, for the Ann Arbor campus there is the addition of a panel with the re-interview of freshmen from 2021, who are now seniors in the fall of 2024. Milestones: Kickoff meeting (SRO) - 8/12/2024 Pretest - 9/11, 9/12 Pre-invitation Email from Chancellors - 10/3/2024 Pre-invitation Email from President Ono - 10/7 Production Launch - 10/7/2024 Email Invitation Letter - 10/9/2024 Reminder 1 - 10/16, 10/17, 10/17 Reminder 2 - 10/30, 10/31,10/31 Reminder 3 - 11/6, 11/7, 11/7 Final Reminder - 11/20, 11/21, 11/21 Production End - 12/9/2024
SRO Project Period	08/2024 - 03/2025
Data Col Period	10/2024 - 12/2024
Security Plan	NA

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

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

Payment Type	Other (Tango cards)
Payment Method	Other (Electronic gift cards via email)

Report Period	Sep, 2024 (SCIP 2024)	Implementing
Risk Level	On Track	
Monthly Updates	The project submitted materials to IRB and were approved on schedule. We successfully conducted a pretest by volunteers within the SRC community. As a result, there will not be any changes needed in the surveys for the production. The project team staff continued to finalize Qualtrics surveys and reports for production. In addition, we finalized the samples from all three campuses and in the process of preparing replicates for launching the data collection. We also confirmed with the President's Office and the Chancellors' Offices (Flint and Dearborn) regarding the release of communication to the campuses. We have kept close communication with the PIs on modification of the key dates.	

Special Issues		
Cost as of Sep 30, 2024	*Total Cost to Date (direct + indirect):*	30,752.42
	Est Cost at Completion (E$AC):	142,202.72
	Total Budget:	137,834.00
	Variance (Total Budget minus- E$AC):	-4,368.72
	Reason for Variance:	We added the $11,000 guaranteed incentive that is not in the budget to the projection. The new regular staff salary took effect in September as well as allocated more hours to the programmers for the groundwork of Tango API for production. We will continue to make adjustments in the next months. (Working with FA to figure out specific line items, beyond respondent payment, that may have contributed to the overrun.)
Projections as of Sep 30, 2024	*Dollars Projected for Month:*	15,981.01
	Actual Dollars Used:	19,807.86
	Variance (Projected minus Actual):	-3,826.85
	Reason for Variance:	The Qualtrics programmer used more hours than we projected. Also, programmers for Tango API work used more hours than we allocated.

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

Project Name	(SRS 2021) Social Relations 2023 (Some Concerns)		
Project Mode	Primary: Face to Face Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 3,937,057.11	**Indirect Budget:** 2,204,753.00	**Total Budget:** 6,141,810.11
Principal	Toni Antonucci (ISR)		
Investigator/Clients	Kristine Ajrouch (ISR)		
	Laura Zahodne (ISR)		
Funding Agency	NIH		
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Taghreid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 3400 interviews with respondents aged 35 years or older residing in the tri-county area of Southeast Michigan (Wayne, Oakland and Macomb counties) and 244 interviews with original Social Relations panel sample members aged younger than 65 years of age. The project involves screening up to 6900 new sample lines., with one selected respondent per household. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements (height, weight, blood pressure, grip strength) and saliva collection. The SRS 2023 project will use the same instrument programmed for the D-Amp project, with the only new programming being that for a screener. The screener will be translated into Arabic. No informant or proxy interview is included in the project scope. Interviews will be conducted in English or Arabic.		
SRO Project Period	09/2021 - 05/2023		
Data Col Period	05/2023 - 04/2024		
Security Plan	NA		

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

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

Report Period	Sep, 2024 (SRS 2021)	Implementing
Risk Level	Some Concerns	
Monthly Updates	SRS's goals are to complete 1300 new sample cases and 244 panel cases. The field team is very close to hitting the new sample goal (1,288 completed interviews as of 10/20/2024), but is still lagging in completing panel cases. Roughly 30% of the release panel sample are cases that were lost or were not interviewed in previous waves (refusals or non-interviews). Our response rate with these cases so far is 11%, versus 43% with sample persons who participated when contacted in a previous wave. We believe that we have about 64 potentially viable cases in the panel sample – this will not get us to our goal of 244 cases. The PIs have been advised of the number of potentially viable cases, as well as the response rates and the expectation that we will not reach the panel goals.

The PIs recently (early October) approved an increase in the token of appreciation as well as an all-telephone interview for the panel cases only. We are waiting for IRB approval for these modifications. Our concern is that SRS will run through its funding before these interventions get approved and get out into the field. | |

We currently have interviewer hours projected through the end of December, however interviewers are burning through hours more quickly than projected as they screen and interview new sample cases (which are far easier to interview than the panel cases). We continue to attempt to direct TL and interviewer attention to the panel cases and the importance of the panel to the PIs, and we will de-emphasize interviewing the new sample when we reach our goal.

We are watching the interviewer hour burn rate very carefully and will discontinue interviewing when we run out hours/respondent payment funds.

Special Issues	We continue to have serious concerns about the viability of the panel cases and we are running out of time (and money) to intervene.	
Cost as of Oct 17, 2024	*Total Cost to Date (direct + indirect):*	5,100,124.97
	Est Cost at Completion (E$AC):	6,140,520.24
	Total Budget:	6,141,810.11
	Variance (Total Budget minus- E$AC):	1,289.87
	Reason for Variance:	This is an insignificant variance in a project of this size. We expect the project to use all available funding.
Projections as of Oct 17, 2024	*Dollars Projected for Month:*	344,567.79
	Actual Dollars Used:	222,025.19
	Variance (Projected minus Actual):	122,542.60
	Reason for Variance:	Duplicating and supplies that were projected for the new sample release were significantly lower than projected. Field interviewers were consolidated in August and many screeners were released. This led to reductions in many lines associated with interviewing: interviewer hours, interviewer travel, respondent payments. We have adjusted projections accordingly.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	1300 new/244 panel		
	Goal at Completion:	1300 new, 244 panel		
	Current Actual:	1288 new /130 panel	32% scr/52% main	8.1 new/14.5 panel
	Estimate at Complete:			
	Variance:			
Other Measures	Production is shown as of 10/20/2024.			

Project Name	**(STARRS-LS Waves 3, 4, 5 (Yr1)) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study (On Track)**
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects
Budget	**Direct Budget**: 8,809,515.00 **Indirect Budget:** 4,920,601.00 **Total Budget:** 13,730,116.00
Principal	James Wagner (University of Michigan)
Investigator/Clients	Robert Ursano (Uniformed Services University of the Health Scienc)
	Murray Stein / Ron Kessler (University of California San Diego / Harvard)
Funding Agency	Department of Defense
IRB	**HUM#:** HUM00180765 **Period of Approval:** 3/21/24 - 3/20/25
Project Team	**Project Lead:** Meredith A House
	Budget Analyst: William Lokers
	Production Manager: Ruth B Philippou
	Senior Project Advisor: Lisa S Holland
	Production Manager 1: Jeffrey Albrecht Jr
	Production Manager 2: Lisa M Lewandowski-Romps
Proposal #	no data
Description	This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.
	For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data.
	To date, we have completed 2 waves of STARRS-LS interviewing. During Wave 1, we attempted to contact 50,000 individuals and completed approximately 14,500 full interviews. All Wave 1 participants that completed a full Wave 1 interview were asked to participate in Wave 2. Waves 3 and 4, which are covered in this application, will include the full STARRS-LS Wave 2 sample, regardless of whether they completed the interview.
	In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys).
SRO Project Period	05/2020 - 02/2025
Data Col Period	11/2022 - 04/2024
Security Plan	Yes

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

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

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

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

Report Period	Sep, 2024 (STARRS-LS Waves 3, 4, 5	Implementing
Risk Level	On Track	

Monthly Updates	Project Management and Planning:
	? We sent weekly production updates to the PIs, and reported on progress on the call with the Army/M&RA.
	? Meredith created the agenda/notes and facilitated the weekly meeting with the STARRS project managers.
	? Budget/Funding:
	o Year 5 subaward review and negotiations between U-M ORSP and HJF continued throughout the month. James and Meredith provided answers/clarification to questions from both parties.
	o Our Year 4 no cost extension and accounts expired on September 30. We continued to charge hours and non-salary costs to the expired accounts and will need to move these to the Year 5 accounts when they are available.
	o SRO and ORSP worked on how to distribute the Year 5 subaward money across two overlapping proposals on file with the university (the existing "STARRS 3" proposal (2020-2025) and the new Wave 5 proposal (March 2025-April 2027).
	? IRB:
	o The Wave 5 IRB protocol was approved by the USU IRB on September 9.
	o The amendment for removing the $50 reference from the study brochure so that it is not in conflict with amounts in the incentive experiment.
	   ? The USU IRB provided concurrence on September 20.
	   ? We sent the brochure with mark-up of changes to M&RA on September 23. They submitted a ticket to Army Graphics to request the changes be made to the final print version.
	
	Enclave and User Support:
	? Annual IA security review: We awaited word from M&RA and AAG about a possible upcoming site visit.
	? Annual NDI Data Request: Meredith continued work with Aaron Weingrad, Dr. Ursano, and the CDC on steps required with the online application ahead of making the repeat request for NDI data.
	? Standard Enclave activities continued. These include maintaining security requirements; processing background checks and Great Lakes Cluster (GLC) user access requests, drop box requests, ID swap and data transfer requests; managing software acquisition and updates; and providing user support as needed. Of particular note this month:
	o The quarterly review of Enclave and GLC users and access was completed by all sites.
	o 2 sets of construct files for USUHS and Harvard were processed and posted to the Enclave.
	o Installation of several R packages was completed on the Enclave.
	o Enclave IT staff concluded work on replacing the firewall hardware.
	o We awaited finalization of the DUA (for COVID data sharing) with a researcher at Mass General Brigham.
	o The team carried out onboarding steps for one Harvard analyst, and offboarding steps for one VA fellow and one U-M staff member.
	o The team continued preparations for the transition to new user support ticketing software (Team Dynamix). We identified an analyst at each project site for help with external testing.
	? Biomarker group request for assistance:
	o STARRS genomic & survey variables to Yale: Enclave and IT staff identified the most appropriate method for transferring the large data files; these were transferred to the requestor; we awaited confirmation of successful download of all files.
	o We began discussions about potential risks and limitations related to a request to share genetic, diagnostic and sociodemographic data with a researcher from the Defense Health Agency (DoD).
	
	Public Use Data:
	? Inventory document:
	o The team continued work on creating crosstabs for the various blood flags with the identified demographic and disorder variables, as well as a draft of the inventory document itself.
	   ? We created the general counts of each of the biosample flags (e.g., unique soldiers with each blood flag and unique soldiers with each blood flag by study) and added these to the draft inventory document.
	   ? Lisa Lewandowski-Romps circulated a draft of the inventory document to Dr. Stein and the research team on September 30, requesting review before publication at ICPSR.
	   ? Lisa provided answers to questions from the research team about the inventory document contents (e.g., understanding some of the counts). The questions and feedback were helpful and allowed us to clarify and add information to some areas of the document.
	? We awaited decisions from the Army/GSC on producing the genetic and bioassay files for public use and placing data in the NIH National Data Archive and Public use release for GWAS.
	
	Wave 4 Post-Production:
	• We continued work toward the final deliverable of Wave 4 survey tables and MasterID table.
	• The team continued work on final documentation.
	
	Wave 5 Pre-Production:
	• The team continued preparations for interviewer and team leader trainings including timeline refinement; hiring and staffing steps; coordinating with training and technical support teams; and drafting materials such as manuals, presentations, training agendas, and supplemental resources.
	• Wave 5 survey testing continued.
	• Refinements to the programming of the sample management system continued; we completed a system "rules" test and prepared for and began a full systems integration test.
	• The team continued work on QC systems, report development, and Wave 5 sample preload.

Special Issues	The following area of risk has been updated with the last 2 bullets:

? U-M STARRS funding timeline and proposal/agreement needs past Year 5.
o U-M will likely experience a gap in funds for continued Wave 5 work after February 2025 until the Year 6 POP award is received (projected to be August 2025 based on past years). SRO and the university are unlikely to authorize a hardship account for more than 2 (maybe 3) months in length
? There are options for handling the likely gap in funding after February 2025:
1. Issuing additional funding to U-M from cost savings,
2. Submitting budgets earlier, and/or
3. Planning for pre-award spending to be able to start in March 2025.
? We understand that option 3 will be pursued. We have been asked to provide the Year 6 budget mid-November. We are hopeful that the Year 6 subaward will be in place no later than mid-May 2025 which would be toward the end of a 2-3 month hardship period.
? Please note that after HJF sends the annual subaward to U-M, the back and forth negotiation of contract language between U-M ORSP and HJF takes a minimum of 5 weeks. The Year 5 subaward, currently still in process, is now going on 12 weeks of negotiation (to the fault of no one; the back and forth just takes so much time). Because of this, even with a 2-3 month hardship, the drafted subagreement would need to be received by U-M around March 1, 2025.

Cost as of Aug 31, 2024	Total Cost to Date (direct + indirect):		11,788,286.44
	Est Cost at Completion (E$AC):		13,587,381.71
	Total Budget:		13,730,116.00
	Variance (Total Budget minus- E$AC):		142,734.29
	Reason for Variance:	General underspending across salary groups.	
Projections as of Aug 31, 2024	Dollars Projected for Month:		219,681.86
	Actual Dollars Used:		189,847.95
	Variance (Projected minus Actual):		29,833.91
	Reason for Variance:	The underspending was to a low degree across most task salary lines. Most of the projections updates this month were for requests for increased or new hours for TSG staff for integration and pre-production work over the next few months.	

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

Developmental/Initiative Projects Dashboard

NonArchived Development Initiative and No-DataCol Projects

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

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

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

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

Report Period	Sep, 2024 (TSME25 Blaise 5 (423562))	Initiation
Risk Level	On Track	
Monthly Updates	We finished our epic and presented it to TSG Admin. I am working with Nicole Doher to get set up with cost reports. Work continues (time permitting) on finalizing the setup of the best server environment for our surveys. Project work is heavy, but we will return to this in November.	
Special Issues		

Cost as of	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	10,000.00
	Variance (Total Budget minus- E$AC):	0.00
	Reason for Variance:	

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

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

Other Measures

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

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

Project Name	**(TSME25 DCO Systems Support (483248)) TSME25 DCO Systems Support (483248) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 40,000.00	**Indirect Budget:** 0.00	**Total Budget:** 40,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Vivienne Y Outlaw		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	To be determined		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		
Milestones	*Pre Production Start:*		*Pretest Start:*
	Pretest End:		*Recruitment Start:*
	Staffing Complete:		*GIT Start:*
	SS Train Start:		*SS Train End:*
	DC Start:		*DC End:*
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Sep, 2024 (TSME25 DCO Systems Support (483248))		Initiation
Risk Level	On Track		
Monthly Updates	- updated project assignment email for SSL - Set up Staff List SSRS report - Started preparing for FOTY 2025 - Investigated the request for project assignment closure notifcation to Footprint as related to the new Team Dynamics rollout		
Special Issues			
Cost as of Oct 09, 2024	*Total Cost to Date (direct + indirect):*		8,911.77
	Est Cost at Completion (E$AC):		38,911.74
	Total Budget:		40,000.00
	Variance (Total Budget minus- E$AC):		1,088.26
	Reason for Variance:	na	
Projections as of Oct 09, 2024	*Dollars Projected for Month:*		3,333.33
	Actual Dollars Used:		1,609.38
	Variance (Projected minus Actual):		1,723.95
	Reason for Variance:	na	

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

Other Measures x

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

Other Measures x

Project Name	**(TSME25 MSMS Line Generator (483227)) TSME25 MSMS Line Generator (483227) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 10,500.00	**Indirect Budget:** 0.00	**Total Budget:** 10,500.00
Principal Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Mark Simonson		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager: Sarah Elisa Broumand		
	Senior Project Advisor: Carol Lively		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	TSME25 MSMS Line Generator		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		

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

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

Report Period	Sep, 2024 (TSME25 MSMS Line Generator (483227))		Planning
Risk Level	On Track		
Monthly Updates	Meetings with stakeholders were initiated to be able to draft the requirements for the new MSMS line Generator. Met with Rose, Laura and Brad as a group and then had one-on-one meetings with Brad and Rose each to review their current processes and document those.		
Special Issues			
Cost as of Oct 16, 2024	*Total Cost to Date (direct + indirect):*		1,344.04
	Est Cost at Completion (E$AC):		10,500.00
	Total Budget:		10,500.00
	Variance (Total Budget minus- E$AC):		0.00
	Reason for Variance:	Pending some timesheet changes from September, hours that were charged but not worked are being removed. We don't anticipate a variance from Total Budget	
Projections as of Oct 16, 2024	*Dollars Projected for Month:*		1,519.99
	Actual Dollars Used:		1,122.21
	Variance (Projected minus Actual):		397.78
	Reason for Variance:	Still working on projections.	

Measures

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

Other Measures

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

Project Name	**(TSME25 MSMS Performance (425267)) TSME25 Mixed-mode systems dev support - Reliability & Performance (425267) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 100,000.00	**Indirect Budget:** 0.00	**Total Budget:** 100,000.00
Principal			
Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Jim Rodgers		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	Mixed-mode systems dev support - Reliability & Performance		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		

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

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

Report Period	Sep, 2024 (TSME25 MSMS Performance (425267))	Implementing
Risk Level	On Track	
Monthly Updates	Work is proceeding	
Special Issues		
Cost as of Oct 09, 2024	*Total Cost to Date (direct + indirect):*	32,785.25
	Est Cost at Completion (E$AC):	96,978.33
	Total Budget:	100,000.00
	Variance (Total Budget minus- E$AC):	3,021.67
	Reason for Variance: Update	
Projections as of Oct 09, 2024	*Dollars Projected for Month:*	19,751.72
	Actual Dollars Used:	18,516.32
	Variance (Projected minus Actual):	1,235.40
	Reason for Variance: Update	

Measures

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

Other Measures

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

Other Measures

Project Name	**(TSME25 ODS Data Dictionary (425198)) TSME25 ODS Data Dictionary (425198) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 4,500.00	**Indirect Budget:** 0.00	**Total Budget:** 4,500.00
Principal			
Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Mark Simonson		
	Budget Analyst:		
	Production Manager: Sarah Elisa Broumand		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	Request by Grant, TBD		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		

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

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

Report Period	Sep, 2024 (TSME25 ODS Data Dictionary ~~(425198))~~	Planning
Risk Level	On Track	
Monthly Updates	Sarah B. will meet with Grant B. (probably in Oct 2024) to understand the requirements of this project.	
Special Issues		

Cost as of Oct 16, 2024	*Total Cost to Date (direct + indirect):*		0.00
	Est Cost at Completion (E$AC):		4,500.00
	Total Budget:		4,500.00
	Variance (Total Budget minus- E$AC):		0.00
	Reason for Variance:	Working on initial Projections. There was a cost listed in CRS due to Research Salaries, we are correcting them by entering real projections soon. So for now, all finances are on track.	
Projections as of Oct 16, 2024	*Dollars Projected for Month:*		375.00
	Actual Dollars Used:		0.00
	Variance (Projected minus Actual):		375.00
	Reason for Variance:	Working on initial Projections	

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

Other Measures

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

Other Measures

Project Name	(TSME25 QC Systems (483249)) TSME25 QC Systems (483249) (On Track)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 35,000.00	**Indirect Budget:** 0.00	**Total Budget:** 35,000.00
Principal			
Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Sarah Elisa Broumand		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1:		
	Production Manager 2: Shonda R Kruger-Ndiaye		
Proposal #	no data		
Description	to be entered		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		

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

Other Project Team Members	Shaowei Sun, Brianna Sabol, Andrew Piskowoski, Cheng Zhou, Hueichun Peng, LihShwu Key
Other Project Name	
Sample Mgmt System	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Sep, 2024 (TSME25 QC Systems (483249))	Implementing
Risk Level	On Track	
Monthly Updates	This project has been focused on reports and finishing up updating the IIR module for trainees to match what they see in real production evaluations. All FY24 work updating software, replacing angular code and synchronizing the entity framework was completed and released to production.	
Special Issues		
Cost as of Oct 16, 2024	*Total Cost to Date (direct + indirect):*	7,645.86
	Est Cost at Completion (E$AC):	34,664.34
	Total Budget:	35,000.00
	Variance (Total Budget minus- E$AC):	335.66
	Reason for Variance: minimal variance	
Projections as of Oct 16, 2024	*Dollars Projected for Month:*	3,527.52
	Actual Dollars Used:	2,728.52
	Variance (Projected minus Actual):	799.00
	Reason for Variance: Hours will be pushed forward.	

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

Other Measures

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

Other Measures

Project Name	**(TSME25 System Maintenance - General (483910)) TSME25 System Maintenance - General (483910) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 35,000.00	**Indirect Budget:** 0.00	**Total Budget:** 35,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Jeffrey L Smith		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	Support for TSG systems		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		

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

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

Report Period	Sep, 2024 (TSME25 System Maintenance General (483910))	Implementing
Risk Level	On Track	
Monthly Updates	Meetings and Coordination - A build team meeting established a foundation for subsequent tasks. - The PB/ST build team meeting and preparation ensured strategic alignment. - A meeting specifically about SRO IDs clarified and managed related queries. - The ST/PB build team reconvened for additional coordination. - Additionally, a Blaise 5 merge hang meeting was conducted to address specific merging concerns. Administrative and Scheduled Tasks - Tasks under ST Admin 25 were addressed, ensuring smooth administrative operations. - Scheduled tasks under the ST25 account were conducted diligently over two sessions. Data Integration and Merges - An IW Data Merge process was executed. - Releasing the IW Data Merge was also completed. - Extensive efforts were dedicated to the ST Employee Data Merge for ST25, underscoring the importance of maintaining accurate employee records. Technical Support and Bug Fixes - Time was spent ensuring proper operation and maintenance of RCLS and ST25 tasks. - The help desk provided technical support, resolving user issues. - An RCLS 25 bug was successfully resolved.	

- A new SurveyTrak build for TREC was created, and related help desk messages were handled efficiently.

Specialized Tasks
- The DRI Move for TREC ensured a smooth transition.
- A detailed DB Reconcile code/data window review was conducted, essential for ensuring data integrity.
- Modifications to CPS to accommodate other SMS payments

Special Issues			
Cost as of Oct 16, 2024	*Total Cost to Date (direct + indirect):*		9,461.28
	Est Cost at Completion (E$AC):		43,816.87
	Total Budget:		35,000.00
	Variance (Total Budget minus- E$AC):		-8,816.87
	Reason for Variance:	see below	
Projections as of Oct 16, 2024	*Dollars Projected for Month:*		2,465.95
	Actual Dollars Used:		3,688.30
	Variance (Projected minus Actual):		-1,222.35
	Reason for Variance:	see below	

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

Other Measures

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

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

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

Report Period	Sep, 2024 (TSME25 Team Dynamix (425197))	Planning
Risk Level	On Track	
Monthly Updates	Worked on defining SRO ID's and a source location that ID's can be pulled into TeamDynamix via an API call.	
Special Issues		
Cost as of Oct 16, 2024	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	15,750.00
	Total Budget:	21,000.00
	Variance (Total Budget minus- E$AC):	5,250.00
	Reason for Variance: See below	
Projections as of Oct 16, 2024	*Dollars Projected for Month:*	1,750.00
	Actual Dollars Used:	0.00
	Variance (Projected minus Actual):	1,750.00
	Reason for Variance: See below	

Measures

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

Other Measures

Measures

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

Other Measures

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

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

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

Report Period	Sep, 2024 (TSME25 Translation Tool (483424))	Initiation
Risk Level	On Track	
Monthly Updates	We finished our epic and presented it to TSG Admin. I am working with Nicole Doher to get set up with cost reports. I hope to begin reporting cost information next month.	
Special Issues		
Cost as of	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	10,500.00
	Variance (Total Budget minus- E$AC):	0.00

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

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

Other Measures

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

		Units at Complete	**RR**	**HPI**
	Current Goal			

Project Name	**(TSME25 UI Testing Tool (423463)) TSME25 UI Testing Tool (423463) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 42,000.00	**Indirect Budget:** 0.00	**Total Budget:** 42,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Hueichun Peng		
	Budget Analyst:		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	to be entered		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		
Milestones	*Pre Production Start:*		*Pretest Start:*
	Pretest End:		*Recruitment Start:*
	Staffing Complete:		*GIT Start:*
	SS Train Start:		*SS Train End:*
	DC Start:		*DC End:*
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Sep, 2024 (TSME25 UI Testing Tool (423463))	Initiation
Risk Level	On Track	
Monthly Updates	Carol discussed this initiative with SRO Admin and TSG Leadership group. The pending decision is to move 10K from this initiative for Splunk support. Then, we will use the rest to focus on "UI Testing Tool". There will be a cross-subgroup team working on this initiative.	
Special Issues		

Cost as of	*Total Cost to Date (direct + indirect):*		0.00
	Est Cost at Completion (E$AC):		0.00
	Total Budget:		42,000.00
	Variance (Total Budget minus- E$AC):		0.00
	Reason for Variance:	na	
Projections as of	*Dollars Projected for Month:*		0.00
	Actual Dollars Used:		0.00
	Variance (Projected minus Actual):		0.00
	Reason for Variance:	na	

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

Other Measures

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

Other Measures