
Survey Research Operations

Monthly Project Report

Sponsored Data Collection Projects and Development Initiative

October 2024



Sponsored Projects Dashboard

[illegible]

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 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)

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 End: Staffing Complete: SS Train Start: 07/10/2024 DC Start: 08/01/2024		Pretest Start: Recruitment Start: GIT Start: 07/09/2024 SS Train End: 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	Oct, 2024 (ANES 2024)	Implementing
Risk Level	Some Concerns	

Monthly Updates	<p>Current Post-Election production/goal (%) Data collection is progressing, but is a little bit slower than has historically been the case.</p> <p>In-person: 254/938 (27%) 938 is a 90% reinterview rate from Pre -95 In-person, 11 Telephone, 148 Video</p> <p>Web - Fresh 241/1,719 (14%) 1,719 is an 85% reinterview rate from Pre</p> <p>Web - Panel 700/1,964 (35.6%) 1,964 is an 90% reinterview rate from Pre</p> <p>Web - GSS 292/888 (32.9%) 888 is an 85% reinterview rate from Pre</p> <p>Paper - 0/221 The paper survey for post-election has not started yet. 221 is an 85% reinterview rate from Pre</p> <p>Pre-election summary</p> <p>In-person: 1,042/1,200 (87%) - The PIs would like 1,000 interviews. We are 104% of the way to that goal. -966 In-Person, 68 Telephone, 8 Mixed (In-person and Phone)</p> <p>Web - Fresh: 2,287/2,400 (95%) 2,022 Web, 265 PAPI</p> <p>Web - Panel: 2,182/2,136 (102%)</p> <p>Web - GSS: 987/900 (110%)</p> <p>Training</p> <p>There was a training in the SSL on October 11 with 4 SSL interviewers and 1 student. The post-election video training occurred October 28-30 for 10 interviewers and 5 TLs. The in-person post-election briefings (~3 hours) were held for field staff in one of three sessions planned on 11/7 and 11/8.</p> <p>We spent October and the early part of November finishing the pre-election data collection, while simultaneously preparing for the post-election data collection launch. The PIs left it to SRO to decide whether to interview on election day. We were allowed to begin at interview up until 5:00pm Eastern.</p> <p>We launched post-election video interviews on Nov. 7th. There were some technical issues uncovered after the launch related to how the Zoom links were set-up. A person can only have 2 concurrent meetings. In testing this wasn't a problem, but in production it was causing issues. Sometimes Zoom would only let one session happen, and in other instances allowed more than 2 concurrent sessions. It was also affecting the Zoom account of the person who set-up the meetings. We switched to a model where the interviewer that is going to do the interview is sending a link unique to that meeting prior to the meeting and is updating the calendar invite. This change seems to be working well.</p> <p>Field interviewing began on 11/12. There was a concern that having so many video appointments (~2/3 of pre-election completes scheduled a video appointment) was going to be detrimental to field work. While there is some impact, these seems to have been mitigated with the communication and flow of cases between the SSL and the field.</p> <p>Web interviewing began on 11/13. Email invitations were mailed that evening (for fresh web and panel cases). Mailed invitations to the aforementioned groups + GSS mail and email invitations from NORC were sent on 11/14.</p> <p>The PIs decided there wasn't a reason to wait until January for Replicate 2 (the remaining 1/3 of the fresh web completes). We are in the process of preparing to launch that later this week. It will remain on a slightly different timeline (we won't sync with Replicate 1).</p> <p>We will have the SRO team start to think about debriefing (especially the tech staff as their work is winding down) about things that worked and didn't work on the project. There will be a more formal debriefing with the research team in the future.</p>	
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Special Issues		
Cost as of Nov 07, 2024	Total Cost to Date (direct + indirect):	3,880,959.67
	Est Cost at Completion (E\$AC):	7,626,969.64
	Total Budget:	6,926,240.00
	Variance (Total Budget minus- E\$AC):	-700,729.64
	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 Nov 07, 2024	Dollars Projected for Month:	1,215,323.02
	Actual Dollars Used:	1,217,073.54

Variance (Projected minus Actual):

-1,750.52

Reason for Variance:

Pretty close!

Measures		Units at Complete	RR	HPI
	<i>Current Goal:</i>	1,200/938	38%	10.5/6.0
	<i>Goal at Completion:</i>			
	<i>Current Actual:</i>	1,042/254	35%	14.17/3.81
	<i>Estimate at Complete:</i>			
	<i>Variance:</i>			

Other Measures

Project Name	(BFY) Baby's First Years (Some Concerns)												
Project Mode	Primary: Face to Face Total of Modes: 1												
Project Type	Sponsored Projects												
Budget	Direct Budget: 6,571,291.56	Indirect Budget: 2,107,694.29	Total Budget: 8,678,985.85										
Principal Investigator/Clients	Dr. Greg Duncan (University of California - Irvine)												
	Dr. Kimberly Noble (Teachers College Columbia University)												
	Dr. Katherine Magnuson (University of Wisconsin)												
Funding Agency	National Institute of Child Health and Human Development (NICHD)												
IRB	HUM#: HUM00137963	Period of Approval:											
Project Team	Project Lead: Piotr Dworak												
	Budget Analyst: David Kellermeyer												
	Production Manager: Veronica Connors-Burge												
	Senior Project Advisor: Stephanie A Chardoul												
	Production Manager 1: Margaret Lavanger												
	Production Manager 2:												
Proposal #	no data												
Description	<p>University of Michigan Survey Research Center (U-M SRC) is contracted to recruit and interview participants for Baby's First Years -- a longitudinal randomized control trial study.</p> <p>The study's full name, listed on sub-contract documents, is Household Income and Child Development in Early Years. The study will draw on a convenience sample of mothers and their newborns in four US metropolitan areas: New York City; Omaha/Lincoln; New Orleans; and Minneapolis. One or two hospitals, listed in this application, will be used as recruiting sites in each area. The study uses a randomized control trial design in which low-income mothers and newborns will be randomly assigned to a treatment group that receives an unconditional income enhancement -- cash payments of \$333 per month—an amount roughly comparable to a variety of income assistance policies in the U.S. and shown to be associated with meaningful improvements for poor children in prior studies—or to a control condition that receives \$20 per month. In both groups, the payments will be made for the first 40 months of the child's life. To understand the impacts of added income on children's development, researchers will assess treatment/control group differences at ages 1, 2 and 3 on measures of cognitive, language, memory, self-regulation and socio-emotional development. Recruitment is scheduled to start in April of 2018, and each follow-up interview will be conducted 12 months later -- close in time to the child's 1st, 2nd, and 3rd birthday. The feasibility of the approach has been established in a one-year pilot conducted in 2014 at the New York Presbyterian Hospital/Columbia University Medical Center.</p> <p>The Principal Investigators are Dr. Greg Duncan from University of California Irvine (UCI), Dr. Kimberly Noble from Teacher's College Columbia University (TCCU), and Katherine Magnuson from University of Wisconsin-Madison (UWM). UCI (Dr. Duncan) and TCCU (Dr. Noble) are the institutions and signatories funding the U-M SRC subcontract from various sources including the National Institute for Child Health and Human Development (NICHD) and private foundations listed in this application. The study research team also includes co-investigators Lisa Gennetian (New York University), and Hiro Yoshikawa (New York University).</p> <p>SRO will be responsible for four interactions with the selected mothers/infants:</p> <ul style="list-style-type: none"> • Baseline will occur immediately (within 24-48 hours) after birth, in the hospital; • Wave 1 will be a telephone interview with the mother when the child is 12 months old; • Wave 2 will be an in-person interview in the family's home that includes survey, developmental assessment, biomarker collection, and video recorded behavioral interaction when the child is 24 months old; • Wave 3 will be an in-person survey done while the mother and child are visiting a lab for other clinical tests when the child is 36 months old. <p>Each data collection phase/wave will be a full 12 months, with Baseline starting in April 2018:</p> <p>Recruitment/Baseline: 04/01/2018 - 03/31/2019 Wave 1: 04/01/2019 - 03/31/2020 Wave 2: 04/01/2020 - 03/31/2021 Wave 3: 04/01/2021 - 03/31/2022</p>												
SRO Project Period	10/2017 - 12/2020												
Data Col Period	04/2018 - 12/2020												
Security Plan	NA												
Milestones	<table border="0"> <tr> <td>Pre Production Start: 10/01/2017</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start: 01/01/2018</td> </tr> <tr> <td>Staffing Complete: 02/07/2018</td> <td>GIT Start: 03/19/2018</td> </tr> <tr> <td>SS Train Start: 03/20/2018</td> <td>SS Train End: 03/22/2018</td> </tr> <tr> <td>DC Start: 05/07/2018</td> <td>DC End: 06/30/2022</td> </tr> </table>			Pre Production Start: 10/01/2017	Pretest Start:	Pretest End:	Recruitment Start: 01/01/2018	Staffing Complete: 02/07/2018	GIT Start: 03/19/2018	SS Train Start: 03/20/2018	SS Train End: 03/22/2018	DC Start: 05/07/2018	DC End: 06/30/2022
Pre Production Start: 10/01/2017	Pretest Start:												
Pretest End:	Recruitment Start: 01/01/2018												
Staffing Complete: 02/07/2018	GIT Start: 03/19/2018												
SS Train Start: 03/20/2018	SS Train End: 03/22/2018												
DC Start: 05/07/2018	DC End: 06/30/2022												

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

Other Project Name HHICD Household Income and Childhood Development

Sample Mgmt System MSMS

Data Col Tool Blaise 5

Hardware Laptop; [UM cell] Phone

DE Software N/A

QC Recording Tool Other (to be specified)

Incentive Yes, R

Administration SRO Group

Payment Type Cash, prepaid (50)

Payment Method Check through other system (MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (MSMS)

Report Period Oct, 2024 (BFY)

Implementing

Risk Level Some Concerns

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 invited 64% of 1,000 participants (n = 641) over to the lab representing 99% of eligible respondents (eligible given their age cohort).

SRO interviewers were asked to travel to MN - trips are being currently planned. Interviewers are also conducting locating for hard-to-reach cases and using the Wisconsin sample management system to record contact information. They also reviewed and practiced administering the Age 6 Phone survey with hard-to-reach respondents. This work is expected to ramp up but only with a limited set of cases (est. 5 - 10% based on prior experience).

We were asked to consider options for ingesting contact information acquired for the lab. BFY now operates in two management systems - U-M MSMS and U-W SMS - and both teams would benefit from contact information sharing. There are two options on the table 1) for the U-W team to consolidate contact information across Lab Age 4, Lab Age 6, and U-M and 2) for U-M to ingest any contact info updates from Lab Age 6. This was not originally included in the scope of the project and we are producing a cost estimate for accepting contact information from the lab.

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 Nov 18, 2024	Total Cost to Date (direct + indirect):	7,834,170.47
	Est Cost at Completion (E\$AC):	8,724,474.84
	Total Budget:	8,678,985.85
	Variance (Total Budget minus- E\$AC):	-45,488.99
	Reason for Variance:	Total overrun is a concern on the project. It has increased from -\$18K to -\$45K despite only small monthly increase. Possibly due to allocations of indirect costs and fees. We do have some funds allocated for travel which are not used at the level they were projected but they will not zero out the current overrun.
Projections as of Nov 18, 2024	Dollars Projected for Month:	21,488.80
	Actual Dollars Used:	25,817.34
	Variance (Projected minus Actual):	-4,328.54
	Reason for Variance:	We are making adjustments to iwer hours to bring the monthly cost down to the projected level. However, in the upcoming months, SRO iwers are asked to travel, and 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	Deborah Robinson (ISR)		
Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Karin Schneider		
	Budget Analyst:		
	Production Manager:		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	SRO will support the project in the first year by working with you to design the sample. SRO will support the implementation of up to two pilot surveys and the larger national survey of libraries. We will provide consultation on scale development throughout the pilot phase and provide statistical support to finalize the scales and provide a working dataset (with weights to account for the stratified sample design). In total, the SRO period of performance will be approximately 24 months in duration, starting in February of 2023, with data collections for the pilots and national survey taking place over approximately 12 months, starting in late 2023.		
SRO Project Period	02/2023 - 02/2025		
Data Col Period	10/2023 - 09/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name	Developing a Model of Black History Month Programming in Public Libraries		
Sample Mgmt System	Web SMS		
Data Col Tool	Blaise 5		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Not used		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
=====			
Report Period	Oct, 2024 (BHM Library Project)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Library lookup is winding up. Getting the sample invited in multiple batches is time consuming.		
Special Issues	No new issues.		
Cost as of Nov 18, 2024	Total Cost to Date (direct + indirect):		140,923.80
	Est Cost at Completion (E\$AC):		201,369.65
	Total Budget:		197,671.00
	Variance (Total Budget minus- E\$AC):		-3,698.65

	Reason for Variance:	Project and sample mgmt demands more time, PI is aware of overrun.
Projections as of Nov 18, 2024	Dollars Projected for Month:	12,840.85
	Actual Dollars Used:	11,211.26
	Variance (Projected minus Actual):	1,629.59

	Reason for Variance:	Slight underrun this month.		
Measures		Units at Complete	RR	HPI
	Current Goal:	2000	30%	
	Goal at Completion:	2000	30%	
	Current Actual:	400	14%	
	Estimate at Complete:	1500		
	Variance:			
Other Measures				

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

Report Period	Oct, 2024 (CARE Military)		Implementing	
Risk Level	On Track			
Monthly Updates	<p>The SRO field team has begun working on newly identified priority groups based on the PI's findings and recommendations for balancing survey data. The SRO management team continued to work with the PI team, Datalys, and QG on how to handle the internal transferred cases correctly as well as continuing to resolve technical issues reported from the respondents or the field team. The SRO project team purchased more credits from Melissa Data to support the locating team.</p> <p>We successfully wrapped up the September Olympics theme challenge. As of 10/31/2024, a total of 4169 military cases have been completed (DCP2+DCP3). In DCP3, a total of 9710 military samples were released, and a total of 836 cases were completed (830 on the web and 6 by CATI).</p>			
Special Issues				
Cost as of	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:		<p>We do not have new funding currently to support the military work. However, military work resumed in April 2024 with civilian funds.</p> <p>**Note: In October 2024, we allocated \$49,953.33 to the Military project with the Civilian funds. This brings our cumulative spending on the military project to \$338,382.35 from April to October 2024. The current spending on Military is reflected the underrun amount in Civilian funds.</p>	
Projections as of	Dollars Projected for Month:		0.00	
	Actual Dollars Used:		52,516.66	
	Variance (Projected minus Actual):		-52,516.66	
	Reason for Variance:		<p>Since we are using Civilian funds there are no projections for this account.</p> <p>**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.</p>	
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022 (On Track)		
Project Mode	Primary: Telephone	Secondary: Web	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 3,718,978.00	Indirect Budget: 966,936.00	Total Budget: 4,685,914.00
Principal	Dr. Steven Broglio (U of M Kinesiology)		
Investigator/Clients	Dr. Michael McCrea (Medical College of Wisconsin)		
	Dr. Thomas McAllister (Indiana University School of Medicine)		
Funding Agency			
IRB	HUM#: 00202691	Period of Approval: 7/23/2021 - open	
Project Team	Project Lead: Donnalee Ann Grey-Farquharson		
	Budget Analyst: David Kellermeyer		
	Production Manager: Barbara Aghababian-Homburg		
	Senior Project Advisor: Barbara Lohr Ward		
	Production Manager 1: Hongyu Johnson		
	Production Manager 2: Keith Liebetreu		
Proposal #	no data		
Description	<p>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</p> <p>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.</p> <p>This budget assumes an overall SRO involvement period of approximately 44 months over two waves. Wave 1 SRO involvement will begin in December 2021 with data collection taking place over approximately 12 months, beginning approximately May 2022. Wave 2 SRO involvement will begin in November 2023 with data collection taking place over approximately 12 months starting in May 2024.</p> <p>Currently, the total cost for the overall scope of work (based on the currently committed funding from all sources) is estimated at \$4,685,914. This includes \$3,718,978 direct and \$966,936 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders). As additional sources of funding are identified and those resources committed to SRO survey data collection activities, or inversely if a funder withdraws or reduces their level of funding to the project, the scope of work (e.g., the number of interviews to be collected) will increase or decrease respectively.</p> <p>The estimate of funding contributed by the Department of Defense through the MTEC RFP is \$2,277,689. This includes \$1,807,689 direct costs and \$470,000 indirect costs budgeted at the 26% indirect cost rate. The proposed period of support is September 1, 2021 through August 31, 2025.</p>		
SRO Project Period	10/2021 - 08/2026		
Data Col Period	03/2022 - 02/2026		
Security Plan	NA		
Milestones	<div><div>Pre Production Start:</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start:</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End:</div></div>		

Other Project Team Members	Donnalee Grey-Farquharson, Barb Homburg, Hongyu Johnson, Keith Leibetreu, James Koopman, Ruyi Chen, David Ackuaku, David Kellermeyer
Other Project Name	CARE CSI, CARE SALTOS
Sample Mgmt System	Other (non-SRO)
Data Col Tool	Other (non-SRO)
Hardware	Laptop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, R
Administration	UM Group (Kinesiology)
Payment Type	Check, post (\$150.00)
Payment Method	Check through other system (UM)

Report Period	Oct, 2024 (CARE SALTOS MTEC)	Implementing
Risk Level	On Track	
Monthly Updates	<p>The SRO field team has begun working on newly identified priority groups based on the PI's findings and recommendations for balancing survey data. The SRO management team continued to work with the PI team, Datalys, and QG on how to handle the internal transferred cases correctly as well as continuing to resolve technical issues reported from the respondents or the field team. The SRO project team purchased more credits from Melissa Data to support the locating team.</p> <p>We successfully wrapped up the September Olympics theme challenge. As of 10/31/2024, a total of 5730 civilian cases have been completed (DCP2+DCP3). In DCP3, a total of 20068 civilian samples were released, and a total of 2424 cases were completed (2395 on the web and 29 by CATI).</p>	

Special Issues		
Cost as of Oct 31, 2024	Total Cost to Date (direct + indirect):	3,163,725.40
	Est Cost at Completion (E\$AC):	4,685,496.72
	Total Budget:	4,685,914.00
	Variance (Total Budget minus- E\$AC):	417.28
	Reason for Variance:	<p>An extra 3 weeks of Interviewer work added which reduced the previous underrun.</p> <p>**Note: In October 2024, we allocated \$49,953.33 to the Military project with the Civilian funds. This brings our cumulative spending on the military project to \$338,382.35 from April to October 2024. The current spending on Military is reflected the underrun amount in Civilian funds.</p>

Projections as of Oct 31, 2024	Dollars Projected for Month:	145,761.08
	Actual Dollars Used:	129,754.51
	Variance (Projected minus Actual):	16,006.57
	Reason for Variance:	Difference is due to reduced regular staff hours.

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 Doherty		
	Production Manager: Ruth B Philippou		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1: Steven Sonoras		
	Production Manager 2:		
Proposal #	no data		
Description	The CCS seeks to understand factors that influence first year community college students in their program choice. We will survey a selection of students entering a community college for the first time in the fall of 2023 and then follow up with them in the second semester (Spring 2024) and their third semester (Fall 2024). The researchers will recruit 4 community colleges to participate.		
SRO Project Period	01/2023 - 03/2025		
Data Col Period	10/2023 - 11/2024		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 08/01/2024</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start: 10/23/2024</div><div>DC Start: 10/14/2024</div></div> <div><div>Pretest Start:</div><div>Recruitment Start: 09/17/2024</div><div>GIT Start:</div><div>SS Train End: 10/23/2024</div><div>DC End: 12/08/2024</div></div>		
Other Project Team Members	Marsha Skoman - Qualtrics Programmer Ed Green - Data Manager Hueichun Peng - Web SMS Programmer		
Other Project Name	How Community College Students Choose Programs of Study		
Sample Mgmt System	Web SMS		
Data Col Tool	Other (Qualtrics)		
Hardware	Desktop		
DE Software	NA		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Cash, prepaid (\$5); Cash, post (\$40); Other (Visa electronic gift cards, Amazon gift codes)		
Payment Method	Imprest Cash Fund from ISR Business Office; Other (VISA eGift cards from HSIP, Amazon gift codes from Teachers Coll)		
=====			
Report Period	Oct, 2024 (CCS)		Implementing
Risk Level	On Track		
Monthly Updates	<div>Project Management</div> <div>-Jeffrey investigated the mail issue (unsealed envelopes sent on wrong day) and worked with the PIs and Stephanie to update the budget with additional SRO funds.</div> <div>Production</div> <div>-Production launched on 10/15/24.</div> <div>-2,764 invitation cards were sent on 10/15 and 10/21.</div> <div>-We trained 12 production staff on 10/23 for reminder calling, which kicked off on 10/25.</div>		

-We sent three emails and a text message and achieved a 51% response rate by the end of October.
 -Steven distributed 1,594 \$40 R payments.

Survey Setup
 -Marsha completed the survey setup.

Web SMS Setup
 -Hueichun completed Web SMS setup.

Data Management
 -Ed and Jennie completed and loaded the production preload. Jeff spot-checked lines to ensure that they were loaded correctly. Marsha crosschecked variable values with embedded data values in Qualtrics to ensure that they matched.
 Two days into production, Jeff downloaded the production data from Qualtrics and sent them to the PIs for their review, which passed.

Reporting
 -Jeffrey maintained the project dashboard and delivered weekly production reports to the PIs.

Special Issues	None.		
Cost as of Nov 21, 2024	Total Cost to Date (direct + indirect):	688,351.55	
	Est Cost at Completion (E\$AC):	869,266.18	
	Total Budget:	644,889.00	
	Variance (Total Budget minus- E\$AC):	-63,683.18	
	Reason for Variance:	Stephanie offered to contribute extra funding to make up for the missing Wave 2 data (\$50,000) and unsealed mail (\$10,000) issues. Thus, the budget is expected to stay show a \$60,000 overrun for the remainder of the project. Thus, the project is about \$3,683 over the expected overrun. This is Responses have been strong, so we have spent the additional funds, and we are now hoping for approval to add more CCRC funds to the budget to finish out the last 17 days of data collection. For Wave 3, Hueichun worked 44 (37%) fewer hours, Marsha worked 28 (37%) fewer hours, and Chad worked 12.5 (42%) fewer hours than projected. Ed worked 21 (32%) more hours than projected creating preload for testing and production. We also added 20 hours for support from Jennie.	
Projections as of Nov 21, 2024	Dollars Projected for Month:	112,876.33	
	Actual Dollars Used:	57,209.88	
	Variance (Projected minus Actual):	55,666.45	
	Reason for Variance:	The variance (\$55,666) in October was primarily due to R payments not hitting when expected. We paid \$96,570 but only \$31,587 has been charged. Interviewers' hours for the training on 10/23 also have not hit.	
Measures		Units at Complete	RR
	Current Goal:	2941	65%
	Goal at Completion:	2941	65%
	Current Actual:	2724	60.3%
	Estimate at Complete:	2941	65%
	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	Oct, 2024 (CVFS-SCAN)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Although much progress has been made with Blaise programming, testing, and finalizing interview protocols, timeline is still a concern. Factors contributing to the delay in meeting deadlines include:		

- ISER-N was delayed in providing Blaise specs to SRO and as a result delayed the start of programming.
- The Nepal pretest has not yet launched. Pretest was not part of the original scope and was introduced late. Pretest training was to be completed by the end of September, and they are still certifying Iwers. There is one staff person at ISER-N who is qualified to certify Iwers and as a result, they are still certifying. There may be cuts to the instrument as a result of Pretest, and this could disrupt the programming and testing of Blaise and the development of systems. Additionally, ISER-N is planning a focus group to review translations.
- SRO Blaise programming resources are very tight, and this has caused delays in programming the instrument and fixing the bugs found in testing. The senior Blaise programmer has just started programming this complex instrument that is scheduled to be fully tested and programmed by 12/6. Thus far, he has been supervising the work of a junior programmer. The Blaise programming staff is optimistic that the 12/6 goal will be achieved.
- The questionnaire is much longer than originally scoped. It includes 16 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.

Other technical updates: Surveytrak systems programming is well underway and on schedule. The programmer has received Nepali translations and is currently adding them to Surveytrak. Webtrak and Weblog specifications are complete and in the hands of the systems programmer to start work.

Hardware: ISER-N has purchased and received laptops, and has shipped two laptops to SRO for testing. We are currently working through options for setting up a ghost server to image the laptops.

Translations: The instrument is being translated into Nepali by ISER-N staff. Whey sections of CTT are signed off in English, ISER-N will provide translations to be loaded to Blaise for testing in Nepali.

Training: Training planning is well underway. The agenda has been determined and materials are being finalized. We are working through more details of the agenda, presentations, materials, etc.. for the Feb training, including deadline dates and who is responsible for which tasks.

Special Issues	Blaise programming delays, Pretest delays,			
Cost as of Nov 18, 2024	Total Cost to Date (direct + indirect):			118,299.40
	Est Cost at Completion (E\$AC):			378,724.21
	Total Budget:			575,439.00
	Variance (Total Budget minus- E\$AC):			196,714.79
	Reason for Variance:			Costs have been extended through 10/2025 for Wave 1. Wave 2 projections will be added once key dates are finalized.
Projections as of Nov 18, 2024	Dollars Projected for Month:			43,434.32
	Actual Dollars Used:			38,023.60
	Variance (Projected minus Actual):			5,410.72
	Reason for Variance:			The October 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	<div> <div> Pre Production Start: 12/01/2022 Pretest End: Staffing Complete: 04/10/2023 SS Train Start: 05/18/2023 DC Start: 05/30/2023 </div> <div> Pretest Start: Recruitment Start: 02/01/2023 GIT Start: 05/16/2023 SS Train End: 05/25/2023 DC End: 02/28/2025 </div> </div>		
Other Project Team Members	Taghreid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall		
Other Project Name	Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan)		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	DRI-CARI; Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	SRO Group		
Payment Type	Cash, prepaid (\$75 respondent, \$25 informant); Other (\$2 screener incentive)		
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)		
=====			
Report Period	Oct, 2024 (Health and Well Being in SE MI)		Implementing
Risk Level	Some Concerns		
Monthly Updates	<p>D-AMP/Healthy Brain convenience sample continues to go well, and we are projecting an underrun on both D-AMP and Healthy Brain due to the unexpected efficiency of the convenience sample. The HPI for the convenience sample has dropped to 3.4 HPI per main & informant interview combined – it was budgeted at 7.5 hours per interview combined. In addition, interviewer travel for the convenience sample is lower than budgeted, saving another \$8,000 direct.</p> <p>The D-AMP panel sample, however, has continued to be a struggle. As noted last month, 37.8% of the sample are</p>		

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. An increase in the TOA and the ability to complete a shorter interview by phone was approved by the IRB in late October. Interviewers began to reach out to sample members in the last two days of October, with letters going out during the first week of November. This invention is helping somewhat, however we will still need to release additional panel sample (from the D-AMP CS 2020 sample) in order to meet the goal of having 200 panel sample completes.

On Nov 21, we discussed the expected underrun with the study PIs. The study PIs would like to continue interviewing to complete as many cases as possible. At present we have interviewer hours projected through the end of February 2025, however it is unclear if we have sample that will support interviewing through that time. SRO will work with the PIs to evaluate whether it makes sense to release more area probability sample for D-AMP and Healthy Brain, and develop a strategy to spend down the remaining D-AMP SRO funds prior to the study end date. The PIs requested a third no-cost time extension for the D-AMP grant, which ends 5/31/2025. It is unclear if that request will be granted, although they do know that the project officer supports their request. As of November 21, we have 230 (goal 200) new sample completes, 346 (goal 400) convenience sample completes, and 111 (goal 200) panel completes. We are slightly ahead of schedule on convenience sample; we hope to meet the convenience sample goal before the December holiday break.

Special Issues	An ORIO will shortly be filed on D-AMP for an event that occurred on Social Relations (contacting a household again after an apparent soft refusal). The Compliance Office has requested that we file an ORIO on both studies. The SRO team will review all outstanding new sample cases and begin coding out those that have refused participation. In addition, SRO will assist the research team by review all call records on the panel cases and recommending cases to be dropped from the panel. We have run across a number of respondents who assert that they have asked repeatedly to be removed from all mailings. There have been some very harsh refusals from the panel sample.			
Cost as of Nov 18, 2024	Total Cost to Date (direct + indirect):	3,331,401.94		
	Est Cost at Completion (E\$AC):	2,374,696.19		
	Total Budget:	3,758,127.00		
	Variance (Total Budget minus- E\$AC):	34,358.81		
	Reason for Variance:	The projected underrun is due to the unexpected efficiency of the convenience sample (even more efficient than last month). We are discussing options with the research team to complete more interviews and use the balance of funds.		
Projections as of Nov 18, 2024	Dollars Projected for Month:	67,700.32		
	Actual Dollars Used:	22,772.81		
	Variance (Projected minus Actual):	44,927.51		
	Reason for Variance:	The variance is due to interviewing costs that continued to be charged to Healthy Brain instead of being split between D-AMP and Healthy Brain. We are working with the field team to explain how to charge their time across the two projects.		
Measures		Units at Complete	RR	HPI
	Current Goal:	200/400/200 design		9.0 new/ 9.0 panel
	Goal at Completion:	200/400/200 design		
	Current Actual:	230/346/111	39% scrnr; 47% main	7.7 new/13.5 panel
	Estimate at Complete:			
	Variance:			
Other Measures	Actuals are as of 11/21/2024. The budgeted HPI for the convenience sample was 6.5 HPI plus 1 HPI for the informant. We are running at 3.4 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	<p>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).</p> <p>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.</p>		
SRO Project Period	07/2024 - 05/2025		
Data Col Period	07/2024 - 05/2025		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	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	Oct, 2024 (Healthy Brain Project)		Implementing
Risk Level	Some Concerns		
Monthly Updates	We are projecting an underrun on the Healthy Brain Study related to the unexpected efficiency on the D-AMP convenience sample. We have begun discussion with the research team about how to handle the underrun. The research team would like to take as many cases as possible, however we are constrained by the potential end of the D-AMP project on 5/31/2024.		

As a reminder, respondents must agree to be contacted for the Healthy Brain study, and about 34% of participants do not agree to be contacted. Any extension of interviewing past the D-AMP end date of 5/31/2024 needs to take this Healthy Brain requirement into account. The PIs have requested an extension of the D-AMP project (a third no-cost time extension), however there is some uncertainty as to whether or not it will be extended.

We are still struggling to get the field team to understand how to charge their time across D-AMP and Healthy Brain.

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	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	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 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: 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	<div>Pre Production Start: 01/01/2021Pretest End: 11/23/2021Staffing Complete: 01/15/2022SS Train Start: 02/23/2022DC Start: 03/07/2022Pretest Start: 11/01/2021Recruitment Start: 08/01/2021GIT Start: 02/21/2021SS Train End: 03/03/2022DC End: 06/21/2025</div>		
Other Project Team Members	<div>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), Kristen Cross (Project Assistant), Cindy Huang (Budget Analyst), Andria Goedert (Project Assistant), Megan Hromco (Project Assistant)</div> <div>Tech Team: Karl Dinkelmann, Jeff Smith, Jim Rodgers, Laura Yoder, Marsha Skoman, Ashwin Dey, Pam Swanson, David Bolt, Deb Wilson, Jennie Williams, Rose Zybdel, Stephanie Windisch, Holly Ackerman, Shane Empie, Kelly Chatain, Brianna Sabol</div> <div>Coding Lead: Carolyn Vieira-Martinez</div>		
Other Project Name	HRS 2022 Main 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	Oct, 2024 (HRS 2022 Panel & Baselines)			Implementing
Risk Level	Some Concerns			
Monthly Updates	<p>1. The project team has been working on baseline production monitoring, sample management, logging, weekly mailings and scanning(SSA and SAQ), payment and letter request processing, and implementing the baseline endgame protocols.</p> <p>2. Baseline production improved in October with interviewers working more hours and completing more baseline interviews than projected. Interviewers averaged 45 baseline iws/week.</p> <p>3. Strategies in play in October to boost EGenX production:</p> <ul style="list-style-type: none"> - Offering proxy option for 2nd R in household, - Re-released EGenX endgame sample - Applying the "treatment protocol" from the endgame experiment to all non-final cases - Prioritizing baselines vs screening at the PSU level <p>6. The team worked on drafting respondent materials and protocol for when implement the baseline interview via web.</p> <p>*The "measures" table reflects Panel and Baseline combined as of 11/16/24. Breakdown of Panel and Baseline counts and rates in Other Measures Field.</p>			
Special Issues	Concerns about feasibility of reaching the EGenX baseline goal.			
Cost as of Nov 18, 2024	Total Cost to Date (direct + indirect):			18,080,210.12
	Est Cost at Completion (E\$AC):			18,079,326.12
	Total Budget:			19,016,630.00
	Variance (Total Budget minus- E\$AC):			937,303.88
	Reason for Variance:			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 Nov 18, 2024	Dollars Projected for Month:			-2,040.00
	Actual Dollars Used:			-944.83
	Variance (Projected minus Actual):			-1,095.17
	Reason for Variance:			Variance due to fewer voids hitting the Panel project than projected.
Measures		Units at Complete	RR	HPI
	Current Goal:	19,553	52%	12.4
	Goal at Completion:	22,215	44%	8.3
	Current Actual:	19,600	53%	12.3
	Estimate at Complete:	20,912	42%	9.8
	Variance:	1,303	2%	1.5
Other Measures	<p>Baselines:</p> <ul style="list-style-type: none"> -EGenX generated from screener: Goal: 4,003 iws; Current: 2,615 iws from 9,750 lines spawned; RR: 27.1% -MOC: Goal: 2,000 iws; Final: 2,047 iws (36.4% RR). End date 11/15/2024 -2019 EGenX baselines: Goal: 468 iws, Final: 497 iws (74.4% RR). End date 5/29/2024 Panel: Revised RR Goal: 68% (original goal 74%), Final: 14,441 iws (68% RR). End date 9/2/23 			

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: David Kellermeyer Production Manager: Andrea Sims Senior Project Advisor: Nicole G Kirgis Production Manager 1: Derek Dubuque Production Manager 2: Jennifer C Arrieta		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.		
SRO Project Period	05/2023 - 08/2025		
Data Col Period	05/2024 - 05/2025		
Security Plan	NA		
Milestones	<div> Pre Production Start: 05/15/2023 Pretest End: 02/18/2024 Staffing Complete: 03/15/2024 SS Train Start: 04/23/2024 DC Start: 05/13/2024 </div> <div> Pretest Start: 01/29/2024 Recruitment Start: 12/19/2023 GIT Start: 04/22/2024 SS Train End: 04/29/2024 DC End: 05/24/2025 </div>		
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		

Report Period	Oct, 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.
- 733 additional cases were released to the field.
- The issues with the fall sample and preload files have been resolved at the end of October.
- Training took place from 10/30-11/5. The training started with 95 trainees and ended with 84 interviewers passing certification.
- Web panel production continued to be on hold pending HRS staff's delivery of an updated datamodel with the Rx/Lab linkage code commented out as IRB approval had not yet been received.
- Test DM3 was received at the end of October so testing began in SurveyTrak while the tech team began working on setting up a test project in MSMS.
- Interviewers have exceeded hours goals for every week in October, but didn't meet the weekly iw goals. There were residual effects from Hurricane Helene causing appointments to be rescheduled. Contact rate has overall trended downward over the past couple of months. Interviewers and Team Leaders have been asked to carefully review sample to assure all contact modes, including FTF visits in staffed areas, have been tried on each sample line. Production Managers are in the process of organizing a workshop to provide additional training on how to make the most of every interaction with a respondent. The upcoming release of fresh sample and newly trained staff in previously unstaffed areas is expected to result in an uptick of completed interviews.
- The Exec team decided to hold off implementing the limited effort and prioritization protocols for the time being.

Measures in table below are as of 11/16/24 (week 27).

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 ~1,300 interviews short of the 70% RR goal.		
Cost as of Nov 18, 2024	Total Cost to Date (direct + indirect):	8,995,368.26	
	Est Cost at Completion (E\$AC):	21,476,580.21	
	Total Budget:	21,477,508.00	
	Variance (Total Budget minus- E\$AC):	927.79	
	Reason for Variance:	Minimal variance.	
Projections as of Nov 18, 2024	Dollars Projected for Month:	2,103,835.34	
	Actual Dollars Used:	1,735,357.55	
	Variance (Projected minus Actual):	368,477.79	
	Reason for Variance:	Variance is primarily due to respondent payments and travel costs that have not yet hit. Future projections have been adjusted so cost-at-completion equals the budget.	

Measures		Units at Complete	RR	HPI
	Current Goal:	6,187	25.4	10.0
	Goal at Completion:	15,864	70%	9.3
	Current Actual:	5,979	24.6	14.4
	Estimate at Complete:	14,535	64%	9.0
	Variance:	1,311	6%	0.3

Other Measures

Project Name	(HRS2022-Screening) HRS 2022 - Screening (Some Concerns)		
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 21,264,149.00	Indirect Budget: 7,655,093.00	Total Budget: 28,919,242.00
Principal Investigator/Clients	David Weir (SRC) Helen Levy (SRC) Ken Langa (SRC)		
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Evanthia Leissou Budget Analyst: Richard Warren Krause Production Manager: Senior Project Advisor: Nicole G Kirgis Production Manager 1: Andrew L Hupp Production Manager 2: Theresa Camelo		
Proposal #	no data		
Description	<p>The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample.</p>		
SRO Project Period	02/2021 - 08/2024		
Data Col Period	03/2022 - 06/2024		
Security Plan	NA		
Milestones	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: 04/19/2022 </div> <div style="width: 45%;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	SurveyTrak; MSMS; Other ((Blaise) Case Management App (CMA))		
Data Col Tool	Blaise 5		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Blaise 5 web instrument); N/A		
QC Recording Tool	Camtasia; N/A		
Incentive	Yes, R; Yes, INF		
Administration	SRO Group		
Payment Type	Check, post; Cash, prepaid (\$2); Cash, post		
Payment Method	Check through STak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office		

Report Period	Oct, 2024 (HRS2022-Screening)		Implementing
Risk Level	Some Concerns		
Monthly Updates	<p>Screening continues at a steady pace. We have been largely at goal the past month. The final batch of sample (Release 9) is being QC'd and will be prepared for a January release to web (and field as necessary).</p> <p>We have released 16,460 cases to the endgame protocol. 1,320 cases (8.0%) of cases have completed a screener. 145 cases (11.0%) completed via the web, and 1,175 (89.0%) of cases completed in-person. Flagging of endgame cases has continues.</p>		

Special Issues

Cost as of Nov 19, 2024	Total Cost to Date (direct + indirect):		28,207,502.44
	Est Cost at Completion (E\$AC):		34,958,755.07
	Total Budget:		28,919,242.00
	Variance (Total Budget minus- E\$AC):		-6,039,513.07
	Reason for Variance:		Projections have been entered through June 2025 (projection of when we would meet the baseline production goal).
Projections as of Nov 19, 2024	Dollars Projected for Month:		1,295,066.91
	Actual Dollars Used:		942,951.42
	Variance (Projected minus Actual):		352,115.49
	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:	6,118/3,891	46.7%	2.94
	Estimate at Complete:			
	Variance:			

Other Measures

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

Report Period	Oct, 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 Nov 20, 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 Nov 20, 2024	Dollars Projected for Month:	0.00		
	Actual Dollars Used:	93.58		
	Variance (Projected minus Actual):	-93.58		
	Reason for Variance:	SSA billed an hour to wrong project.		
Measures		Units at Complete	RR	HPI
	Current Goal:	2063	54%	N/A
	Goal at Completion:	2063	54%	N/A
	Current Actual:	671	17%	N/A
	Estimate at Complete:	671	17%	N/A
	Variance:	1392	37%	N/A
Other Measures	N/A			

Project Name	(LHMS 2023 Spring) Life History Mail Study Spring 2023 (On Track)		
Project Mode	Primary: Mail	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 293,540.00	Indirect Budget: 164,382.00	Total Budget: 457,922.00
Principal	David Weir (SRC)		
Investigator/Clients	Jaqui Smith (SRC)		
Funding Agency	NIH		
IRB	HUM#: HUM00106904	Period of Approval: 11/4/2022-11/3/2023	
Project Team	Project Lead: Gary Hein Budget Analyst: Cindy Tsao Production Manager: William Keating Senior Project Advisor: Evanthia Leissou Production Manager 1: Production Manager 2: William Keating		
Proposal #	no data		
Description	<p>The HRS Life History Mail Survey (LHMS) is part of the Health and Retirement Study. The goal of LHMS is to collect retrospective life histories of HRS participants to address multidisciplinary need for information about events, residential location, and education over the entire life course. Information like this allows researchers to understand how individuals' pasts shape their health and economic situations today.</p> <p>A paper questionnaire will be mailed to a sample of approximately 2,288 HRS Respondents. From this sample, approximately 1,242 completed surveys are expected (54% response rate). For the reminder protocol, 495 respondents have been designated to receive a reminder by postcard. The remaining 1,793 respondents will receive reminders by phone to complete the questionnaire. When a respondent is reached by phone, SRO will attempt to complete the 60-minute interview by telephone. Thank you postcards will be mailed to respondents who return a completed questionnaire.</p>		
SRO Project Period	04/2023 - 12/2023		
Data Col Period	06/2023 - 09/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 04/01/2023 Pretest End: Staffing Complete: SS Train Start: 07/11/2023 DC Start: 06/20/2023 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: 07/11/2023 DC End: 09/26/2023 </div> </div>		
Other Project Team Members	Gary Hein: Project Lead Cindy Tsao: Budget Analyst Vanessa Clarke: Project Assistant Carolyn Viera Martinez: Coding Lead		
Other Project Name	LHMS Spring		
Sample Mgmt System	SMS		
Data Col Tool	SAQ; Other (Blaise SMS)		
Hardware	Desktop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Check, prepaid (\$25)		
Payment Method	Check through STRak RPay System		
=====			
Report Period	Oct, 2024 (LHMS 2023 Spring)	Implementing	
Risk Level	On Track		
Monthly Updates	October 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 Nov 20, 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 Nov 20, 2024	Dollars Projected for Month:			6,245.17
	Actual Dollars Used:			2,358.31
	Variance (Projected minus Actual):			3,886.86
	Reason for Variance:	Hours for archiving need to be moved to 2025 but were still in October.		
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: 200,023.00	Indirect Budget: 52,005.00	Total Budget: 252,028.00										
Principal Investigator/Clients	Nancy Fleischer (U-M School of Public Health (SPH))												
Funding Agency	MDHHS - Releases 1 - 8												
IRB	HUM#: HUM00234617	Period of Approval: 6/15/2023-6/14/2028											
Project Team	Project Lead: Timothy Prand												
	Budget Analyst: William Lokers												
	Production Manager: Lisa J Carn												
	Senior Project Advisor: Nicole G Kirgis												
	Production Manager 1: Narine Verdiyan												
	Production Manager 2:												
Proposal #	no data												
Description	<p>MI CReSS is a partnership between the University of Michigan School of Public Health (SPH) and the Michigan Department of Health and Human Services. It is a public health surveillance study to learn about Michiganders' experiences with COVID-19 using a representative sample of confirmed cases within the state. Using survey data, they plan to document sociodemographic inequities in COVID-19 testing, treatment, and recovery.</p> <p>SRO's involvement includes the administration of a Follow-up survey for respondents that completed a Baseline survey with the SPH team. Based on the sample information provided, we will be re-contacting approximately 3,995 respondents who have already completed (or are estimated) to complete the Baseline survey to administer the Follow-up survey.</p> <p>The Follow-up survey is estimated to be 45 minutes in length, and Respondents will be encouraged to complete the survey by web. However, SRO Interviewers will contact non-responders and conduct the interview over the telephone if the Respondents do not want to complete the survey on the web.</p> <p>HUM00181068 - Year 3 IRB Exempt - Budget:\$841,375 Total used:\$649,836 HUM00234617 - Year 4 - IRB approved - Budget:\$477,681 (\$998,480 / 822,863.98 used) Year 5 - IRB approved - Budget: \$252,028</p>												
SRO Project Period	08/2021 - 09/2023												
Data Col Period	01/2022 - 07/2023												
Security Plan	NA												
Milestones	<table> <tr> <td>Pre Production Start:</td><td>Pretest Start:</td></tr> <tr> <td>Pretest End:</td><td>Recruitment Start: 06/01/2023</td></tr> <tr> <td>Staffing Complete:</td><td>GIT Start:</td></tr> <tr> <td>SS Train Start: 07/28/2023</td><td>SS Train End: 07/29/2023</td></tr> <tr> <td>DC Start: 09/14/2023</td><td>DC End: 02/18/2025</td></tr> </table>			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
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	Oct, 2024 (MI CReSS (Year 3 & 4 & 5))			Implementing
Risk Level	On Track			
Monthly Updates	<div>Cohort 2</div> <div><div>- Release 1-8 is complete.</div><div>- Releases 9-16 launched 4/23/2024 for English and Spanish, 5/15 for Arabic</div><div>- All releases reminder calling has ended</div><div>- Web availability goes until February 2024</div></div> <div>Project debrief is moved to December 12th.</div> <div>For REL 9 to 16 - 223 completes completed after the TOA increase from \$25 to \$50</div>			
Special Issues				
Cost as of	Total Cost to Date (direct + indirect):			27,864.71
	Est Cost at Completion (E\$AC):			107,823.50
	Total Budget:			252,028.00
	Variance (Total Budget minus- E\$AC):			144,204.49
	Reason for Variance:			Fewer hours needed on project. Will carry forward to MI CReSS Community at the end of Y5
Projections as of	Dollars Projected for Month:			54,529.51
	Actual Dollars Used:			27,864.71
	Variance (Projected minus Actual):			26,664.81
	Reason for Variance:			Lower respondent payments hit this month and fewer hours billed to project than what was expected.
Measures		Units at Complete	RR	HPI
	Current Goal:	3640	77.59%	3
	Goal at Completion:	3650	80%	6
	Current Actual:	3640	77.59%	6.0
	Estimate at Complete:	3650	78%	6.5
	Variance:	0	-2%	.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	<p>Since 1975 the MTF survey has measured drug and alcohol use and related attitudes among adolescent students nationwide. A nationally representative sample of survey participants report their drug use behaviors across three time periods: lifetime, past year, and past month. The survey is funded by the NIDA, a component of the National Institutes of Health (NIH), and conducted by the University of Michigan.</p> <p>It is based on two interconnected series of surveys using nationally representative samples:</p> <p>(a) self-administered annual in-school surveys of 8th, 10th, and 12th graders (~45,000) in 400 schools. Proctors (SRO interviewers) coordinate and administer the data collection in schools (the majority are conducted FTF however, the option is available for the survey to be conducted without the proctor visiting the school).</p> <p>(b) panels of high school graduates aged 19-30, 35, 40,45, 50, 55, and 60 (now primarily surveyed by web). Panel members aged 19-30 are invited to participate every other year/asked to complete a web survey and the older sample members are sent questionnaires (mail and web) at five-year interval. The MTF panel study has three parts - early in the year a newsletter is mailed to panel members. If the newsletter is returned (undelivered) locating effort targets these panel members and others who have not participated for X years. The web panel launches (web) in spring and in around June a telephone non-response effort begins for those invited to participate. The panel members are recruited from the 12th graders who participate in the base year study.</p> <p>Press releases and published results can be found here.. http://www.monitoringthefuture.org/</p>		
SRO Project Period	04/2022 - 03/2027		
Data Col Period	04/2022 - 03/2027		
Security Plan	Yes		
Milestones	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div style="width: 45%;"> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Hueichun Peng Technical Lead (WebSMS and Qualtrics programmer) Ed Green (+Brad Goodwin) Data Management Ashwin Dey SurveyTrak, WebTrak and MTF specific Apps. Programmer Brendon Carroll Help Desk/Tablet support		
Other Project Name			
Sample Mgmt System	SurveyTrak; Web SMS		
Data Col Tool	Other (Qualtrics)		
Hardware	Laptop; Tablet; [UM cell] Phone		
DE Software	Other (Qualtrics)		
QC Recording Tool	N/A		
Incentive	Yes, Other (Honorarium paid to school by MTF Research staff)		
Administration	ISR Group		
Payment Type	NA		
Payment Method	Check through other system		

Report Period	Oct, 2024 (MTF Base Year 2022_27)	Implementing
Risk Level	On Track	
Monthly Updates	<p>October 2024</p> <ul style="list-style-type: none"> - Five SRO interviewers have been working on recruiting schools for the coming year. The work involves working through a contact protocol (mix of phone, mail, email and in-person visits) for some schools and also just making in-person visits to schools that have not responded to attempts by the team of MTF recruiters. The MTF_SRC team are happy with the interviewers efforts and successes to date. - Pre-production work has ramped up in preparation 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). AI is going well so far. 	

Special Issues		
Cost as of Nov 18, 2024	Total Cost to Date (direct + indirect):	2,976,817.58
	Est Cost at Completion (E\$AC):	7,129,999.03
	Total Budget:	9,778,060.00
	Variance (Total Budget minus- E\$AC):	2,648,060.97
	Reason for Variance:	<p>Projections for Funding period 2022 – 2027 (latest client report has been uploaded to MPR)</p> <p>Current projections result in an under spend for the five year grant period. The projected costs are based on completion of 325 schools in years 2024 – 2027 (we were projecting costs for 400 schools) and all in-person. Illume charges have been removed from projections from 2024 onwards. A portion of the hours for work involved in transitioning MTF surveys to Qualtrics are being charged to the Illume recharge account.</p> <p>Primary reason for the under spend and plans for SRO funding: Projections for the five year period are based on current scope of work and the adapted protocol (introduced in 2021). The budget prepared for the proposal was based on the pre-pandemic design. The adapted protocol brings savings in the following categories: interviewer hours, travel, shipping and staff time (specifically hours required for loading and preparing tablets for shipping). For the past few years the number of schools recruited and passed to SRO has been lower than the number used for this budget (n=390).</p> <p>In response, MTF (SRC) have reduced our funding for the first two years. We have received (from MTF) \$1,843,080 (Y1) and \$1,143,890 (Y2) a total reduction of \$815,581. Going forward, the current plan is to fund Year 3 and 4 based on the budgeted amount - if there is significant underspending MTF will reduce SRO's Year 5 award. SRO Finance group feels that we should continue to report/monitor using the original budgeted amount because this is not an official reduction in budget. We are keeping the client (via Nick Prieur) informed of actual and projected spend through a monthly cost report.</p>

Projections as of Nov 18, 2024	Dollars Projected for Month:	90,504.37
	Actual Dollars Used:	60,415.24
	Variance (Projected minus Actual):	30,089.13
	Reason for Variance:	Variance was across salary and non-salary costs - majority of the variance were interviewer hours. Projected hours were double actual costs. This is the first year interviewers have been involved in the school recruitment so we will use actual hours for projections for future years.

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	<p>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.</p> <p>This budget assumes an overall SRO involvement period of 20 months commencing in March 2024 with the data collections taking place during a 4-month period (for each wave), beginning in May 2024 (for Wave 1) and May 2025 (for Wave 2).</p>		
SRO Project Period	07/2023 - 12/2025		
Data Col Period	04/2024 - 08/2025		
Security Plan	NA		
Milestones	<div><div>Pre Production Start:</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start:</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End:</div></div>		
Other Project Team Members	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	Oct, 2024 (MTF Early Panel Pilot)		Implementing
Risk Level	On Track		
Monthly Updates	We had no new completes in October due to the nature of the survey consent design. 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 Oct 31, 2024	Total Cost to Date (direct + indirect):			120,002.67
	Est Cost at Completion (E\$AC):			269,640.84
	Total Budget:			288,529.00
	Variance (Total Budget minus- E\$AC):			18,888.16
	Reason for Variance:			The underrun continues to be expected as some staff reduced hours to support another project that will be from August through March 2025.
Projections as of Oct 31, 2024	Dollars Projected for Month:			14,372.97
	Actual Dollars Used:			7,982.97
	Variance (Projected minus Actual):			6,390.00
	Reason for Variance:			The actual used hours are lot less than projected hours. Will make the adjustment to more closely match actual hours moving forward.
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027 (On Track)		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 2,496,935.00	Indirect Budget: 1,398,282.00	Total Budget: 3,895,217.00
Principal	Megan Patrick (UM-SRC)		
Investigator/Clients			
Funding Agency			
IRB	HUM#: 00217920		Period of Approval:
Project Team	Project Lead: Donnalee Ann Grey-Farquharson		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lloyd Fate Hemingway		
	Senior Project Advisor: Rebecca Gatward		
	Production Manager 1:		
	Production Manager 2: Hongyu Johnson		
Proposal #	no data		
Description	<p>Since 1975 the MTF survey has measured drug and alcohol use and related attitudes among adolescent students nationwide. A nationally representative sample of survey participants report their drug use behaviors across three time periods: lifetime, past year, and past month. The survey is funded by the NIDA, a component of the National Institutes of Health (NIH), and conducted by the University of Michigan. MTF has two linked projects, MTF Main surveys students in schools, and MTF Panel surveys adults across the lifespan.</p> <p>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.</p> <p>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.</p>		
SRO Project Period	01/2022 - 03/2027		
Data Col Period	04/2022 - 10/2026		
Security Plan	NA		
Milestones	<div> <div>Pre Production Start:</div> <div>Pretest End:</div> <div>Staffing Complete:</div> <div>SS Train Start:</div> <div>DC Start:</div> </div> <div> <div>Pretest Start:</div> <div>Recruitment Start:</div> <div>GIT Start:</div> <div>SS Train End:</div> <div>DC End:</div> </div>		
Other Project Team Members	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	Oct, 2024 (MTF Panel 2022-27)		Implementing
Risk Level	On Track		
Monthly Updates	2024 MTF Panel data collection ended on 10/25/2024.		

-The total Response Rate is 46.36%.

Replica	Panel	Total	Complete	RR%	Partial	RR%	SAQ	RR%
1	12EVEN	3375	1271	37.66	114	3.38	97	2.87
2	12EVEN	3455	1332	38.55	121	3.50	108	3.13
3	12EVEN	3441	1324	38.48	140	4.07	100	2.91
4	AGE35	1270	754	59.37	43	3.39	84	6.61
4	AGE40	1350	719	53.26	45	3.33	117	8.67
4	AGE45	1169	663	56.72	30	2.57	141	12.06
5	AGE50	1240	729	58.79	29	2.34	148	11.94
5	AGE55	1160	699	60.26	29	2.50	189	16.29
6	AGE60	1275	736	57.73	23	1.80	303	23.76
6	AGE65	1315	747	56.81	35	2.66	353	26.84
9	FU1	364	26	7.14	1	0.27	0	0.00
All	All	19414	9000	46.36	610	3.14	1640	8.45

Special Issues

Cost as of Oct 31, 2024	Total Cost to Date (direct + indirect):	1,972,697.33
	Est Cost at Completion (E\$AC):	4,083,359.96
	Total Budget:	3,895,217.00
	Variance (Total Budget minus- E\$AC):	-188,142.96
	Reason for Variance:	The overrun was accumulated overtime from SSL Tech related costs. They spent more hours on Winter Location and Non-response Calling projects due to increased samples since 2022 in addition to increased interviewers' rates. MTF Staff is aware of the deficit because this information is included in the monthly report they receive from SRO.

Projections as of Oct 31, 2024	Dollars Projected for Month:	36,613.86
	Actual Dollars Used:	32,938.34
	Variance (Projected minus Actual):	3,675.52
	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	<p>The National Dementia Workforce Study (NDWS) will be launched by a national team of experts in clinical care of persons living with dementia, survey research, and health workforce research. The goal of the NDWS data infrastructure is to allow researchers and policymakers to ask and answer scientific questions to help build the workforce of clinicians and other professional care providers required by the growing population of persons living with dementia in the U.S. The Core of NDWS will be four surveys that reflect key elements of the professional dementia care workforce in the U.S.: Community Clinicians, Nursing Home Staff, Home Care Staff, and Assisted Living Staff. In addition to these surveys, the NDWS team will develop a variety of additional data sources that can be linked with the surveys in order to maximize the scientific potential of the surveys. The project's activities will be conducted through five Cores: 1) Administrative; 2) Screening and Survey Instrument; 3) Administrative Data Transfer, Masking, Access, and Ethics; 4) Data Collection, Linkages, Cleaning, and Sharing; and 5) Research Studies. The overall aims are to: 1) Launch a family of four nationally representative professional dementia workforce surveys covering the key care delivery settings in the U.S.; 2) Through the National Dementia Workforce Study, build a data infrastructure surrounding the dementia workforce surveys that allows researchers to generate critical insights into the professional dementia care workforce and associated outcomes for PLWD; and 3) Develop and expand the community of researchers focused on the professional dementia care workforce overall and that use the National Dementia Workforce Study data infrastructure.</p> <p>SRO's work is associate with Cores 2 and 4.</p>		
SRO Project Period	10/2023 - 09/2028		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Lisa Holland, Gregg Peterson, Raphael Nishimura, Ji Qi, Anna Fuqua-Smith, Liliana Grueber, Dominic Bonanni, Jackson Collier, Dedra Campbell		
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	Oct, 2024 (NDWS)			Implementing
Risk Level	Some Concerns			
Monthly Updates	<p>October activities:</p> <p>* The pace of data collection remains slow. Issues encountered include the inability to reach a decision-making and lack of interest in participating. The research team has been working to increase publicity and importance of the work through articles/advertisements in relevant industry publications. Discussions of adjusting timelines is ongoing.</p> <p>* To aid contact strategies, SRO organized and facilitated a 2-hour discussion with two NDWS subject matter experts and the RTI and DLH facility recruitment teams to discuss strategies for making contact with organizational leaders and addressing concerns. The data collection partners found the meeting to be useful in generating new approaches to recruitment to implement.</p> <p>* An IRB amendment with changes to outreach materials and procedures were submitting in October with hopes of making these changes for Year 1 data collection end game.</p> <p>* The SRO team received initial data from CC survey and some staff surveys and began review the data, including looking to see if there were any questions that should be added to cognitive testing.</p> <p>* Sampling work on the assisted living sample frame for Year 2 is completed. Sample frame development for home care has made great progress. We are on track for being ready for Year 2.</p> <p>* Year 2 cognitive interviewing preparations began in October. Recruitment was initiated, interviewers briefed for data collection, and the initial interviews were completed by the end of the month. The goal is to complete interviews by November 15 and prepare a report for the survey development team by Thanksgiving.</p>			
Special Issues				
Cost as of Nov 18, 2024	Total Cost to Date (direct + indirect):			745,587.67
	Est Cost at Completion (E\$AC):			6,264,545.73
	Total Budget:			6,750,973.00
	Variance (Total Budget minus- E\$AC):			486,427.27
	Reason for Variance:			
Projections as of Nov 18, 2024	Dollars Projected for Month:			132,447.10
	Actual Dollars Used:			100,252.14
	Variance (Projected minus Actual):			32,194.96
	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 Investigator/Clients	Narayan Sastry (University of Michigan) Elizabeth Fussel (Brown University)		
Funding Agency	NICHD, with supplemental funding being sought from NIA		
IRB	HUM#: HUM00197300		Period of Approval: 4/5/2022-3/22/24
Project Team	Project Lead: Camila Kendall		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Camila Kendall		
	Production Manager 2:		
Proposal #	no data		
Description	SRO will work with the PIs and a local survey firm in Puerto Rico, Estudios Técnicos (ETI), to develop a sample frame, sample design, questionnaire and data collection protocols for both pilot data collection (in 2022) and baseline data collection (in 2023). DMSS will provide assistance with sample design and implementation, responsive design, panel maintenance issues, and creation of sample weights. SRO will update the PSID-21 Spanish instrument for use specifically in PR. SRO will assist with the preparation of training materials for Listing training, Pretest and Main Data collection and will travel to PR to be on-site for these trainings. SRO will define reports for production and quality control monitoring that will be programmed through the SurveyTrak system, and train the research team on using these reports. All data will be collected by ETI's interviewers in PR and will be encrypted and transmitted daily via SurveyTrak to a secure SRC server. SRO will also assist with data processing.		
SRO Project Period	01/2022 - 12/2023		
Data Col Period			
Security Plan	NA		
Milestones	Pre Production Start: 10/01/2021 Pretest End: 03/11/2024 Staffing Complete: SS Train Start: 01/31/2024 DC Start:		Pretest Start: 02/05/2024 Recruitment Start: GIT Start: 01/30/2024 SS Train End: 02/02/2024 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	Oct, 2024 (PR-PSID)		Implementing
Risk Level	Some Concerns		
Monthly Updates	SRO continued to make progress on pretest data out. SRO met with PSID data processing staff for guidance on restructuring/reorganizing the data.		

SRO worked on a formal budget for the Americorps funding.

Met with DMSS and PIs to confirm sample design. 2,352 Sample lines were selected. Duplicate photo and coordinate issue was discovered. Of the 2,352 selected SIDs, 375 have duplicate photos (some have up to 10 different photos). Working with DMSS and TSG to determine the cause of the duplicates, and to come up with a decision rule for how to handle them.

Met with QC implementation team to discuss options for QC/Evaluation in the International Domain -- will use FUM CARI for evaluations.

PIs have not yet reviewed 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. Expect that programming will begin in December.

Special Issues	Same as last month -- overrun and uncertainty around PCP work scope which is new to SRO.			
Cost as of Nov 21, 2024	Total Cost to Date (direct + indirect):	622,368.19		
	Est Cost at Completion (E\$AC):	1,506,961.67		
	Total Budget:	1,292,585.00		
	Variance (Total Budget minus- E\$AC):	-214,376.67		
	Reason for Variance:	TBD		
Projections as of Nov 21, 2024	Dollars Projected for Month:	12,066.20		
	Actual Dollars Used:	5,238.88		
	Variance (Projected minus Actual):	6,827.32		
	Reason for Variance:	Programming & Tech development did not begin in Oct as expected. Projections were moved forward.		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(PSID 2025 OCU) PSID 2025 Online Contact Update (On Track)		
Project Mode	Primary: Web	Secondary: Mail	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 52,360.00	Indirect Budget: 29,326.00	Total Budget: 81,686.00
Principal	Katherine McGonagle (PSID)		
Investigator/Clients	Noura Insolera (PSID)		
Funding Agency	NSF		
IRB	HUM#: HUM00062417		Period of Approval:
Project Team	Project Lead: Camila Kendall		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	SRO will update the Blaise and MSMS specifications from 2022 and program and test a Blaise 5 web instrument and web portal with authentication that allows PSID and TAS respondents to confirm or update their contact information via an online survey. SRO will provide PSID authenticated links so that they can merge QR codes that will be embedded in a mailing sent to the respondents. SRO will also program and send the respondents up to three email reminders with an authenticated link. This project is under the PSID Core IRB.		
SRO Project Period	04/2024 - 05/2025		
Data Col Period	07/2024 - 12/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest Start: Pretest End: Recruitment Start: Staffing Complete: GIT Start: SS Train Start: SS Train End: DC Start: DC End: </div> </div>		
Other Project Team Members	Shonda Kruger-Ndiaye -- PSID Suite Lead Rachel Orlowski -- PSID Survey Director Daric Throne -- MSMS Spec Lead James Rodgers -- MSMS Lead Karl Dinkelmann -- Blaise Lead Jeffrey Smith -- TSG Lead Jude Perillo -- Blaise Programmer Darnell Christian -- MSMS Set Up Programmer Edward Green -- Data Manager Rose Zdybel -- Data Management Support Laura Yoder -- Archiving Ivanna Iavorska-Em -- Financial Analyst		
Other Project Name			
Sample Mgmt System	MSMS		
Data Col Tool	Blaise 5		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	ISR Group (PSID)		
Payment Type	Check, post (\$10); Other (electronic, post--JP Morgan)		
Payment Method	NA		
=====			
Report Period	Oct, 2024 (PSID 2025 OCU)		Implementing
Risk Level	On Track		
Monthly Updates	First of three email reminders was sent out on 10/9-10/10 (n=7558). Email was sent in batches of 500, each batch		

took around 20-30 minutes to process.

Reminder was extremely successful -- Web completes doubled between 10/8-10/10.

As of 11/21 -- 2419 web completes.

Special Issues

Cost as of Nov 18, 2024	Total Cost to Date (direct + indirect):	66,425.35
	Est Cost at Completion (E\$AC):	79,503.15
	Total Budget:	81,686.00
	Variance (Total Budget minus- E\$AC):	2,182.85
	Reason for Variance:	Overall cost to complete decreased by \$40 between Sept-Oct. Minimal management and tech hours needed going forward.
Projections as of Nov 18, 2024	Dollars Projected for Month:	2,927.88
	Actual Dollars Used:	2,662.21
	Variance (Projected minus Actual):	265.67
	Reason for Variance:	Minimal work on-going, actuals were very close to projections

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

Other Measures

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	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Project 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	Oct, 2024 (PSID CDS23 Phase 2)	Implementing	
Risk Level	On Track		
Monthly Updates	PSID delivered the second batch of sample (n=143) on 10/1. These cases were assigned to Rel 5. Assembly Update: Weekly assembly started on 10/1. SSL STs Assembled and mailed kits for Releases 1-5 (n=1468). --Note: 32 cases were held from the Rel 2 mailing because they were located within the hurricane disaster zone. These kits were mailed out in Nov. --70 cases were held from Rel 4 until early Nov. because they had been paid \$400 or more across the suite in		

2024. Confirmed with business office that we could proceed and release these cases, as long as we ensure that we do not issue payment's for child's samples, in the PCG's name.

Production Protocol: Extremely light touch contact protocol -- IWERs are instructed to only make send one email/text and place one phone call per week. If R refuses to participate, IWERs will not attempt to convert the refusal and will code out the case as final.

FTF Travel began with Rel 3. First travel trips scheduled for last week of Oct.

Logging began on 10/10. As of 11/21, 677 samples have been logged (16.7% RR). Consent and Saliva problem follow up will begin in Nov or Dec (pending IRB approval of materials).

Final batch of sample will be delivered from PSID after CDS phase 1 closed out. Will run the same payment analysis process to locate SIDs that have been paid \$400 or more during 2024.

Current RR as of 11/21 by Rel: Overall budgeted RR goal is 34%

Rel 1 - 23.8%

Rel 2 - 17.4%

Rel 3 - 18.9%

Rel 4 - 14.2%

Rel 5 - 2.1 %

Special Issues

Cost as of Nov 18, 2024	Total Cost to Date (direct + indirect):	506,196.29
	Est Cost at Completion (E\$AC):	1,666,314.42
	Total Budget:	2,524,678.00
	Variance (Total Budget minus- E\$AC):	858,363.58
	Reason for Variance:	Underrun decreased by ~17K between Sept - Oct as project ramped up (originally budgeted to launch in early Sept, but launched in Oct).
Projections as of Nov 18, 2024	Dollars Projected for Month:	236,736.83
	Actual Dollars Used:	166,541.09
	Variance (Projected minus Actual):	70,195.74
	Reason for Variance:	Underrun mainly due to non-sal costs (postage, laboratory supplies, etc.) that have not hit the project yet. Projections were moved forward.

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

Other Measures

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

Report Period	Oct, 2024 (PSID TAS 2023)		Closing
Risk Level	On Track		
Monthly Updates	October 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.		

Currently expecting the last month to charge the project is November 2024.

Special Issues

Cost as of Nov 18, 2024	Total Cost to Date (direct + indirect):		1,362,923.70
	Est Cost at Completion (E\$AC):		1,366,050.64
	Total Budget:		1,457,428.00
	Variance (Total Budget minus- E\$AC):		91,377.36
	Reason for Variance:		The biggest driver of this reduction is due to fewer hours needed across tech and management categories.
Projections as of Nov 18, 2024	Dollars Projected for Month:		2,479.35
	Actual Dollars Used:		2,073.62
	Variance (Projected minus Actual):		405.73
	Reason for Variance:		The biggest driver of the slight decrease was due to fewer coding hours worked than expected.

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

Other Measures

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

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

Report Period	Oct, 2024 (PSID23)	Implementing		
Risk Level	On Track			
Monthly Updates	Summary of October 2024 Activities			
	Saliva Collection Provided protocol documentation to the PIs and answered their questions in preparation for their Advisory Board Meeting. 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 Nov 18, 2024	Total Cost to Date (direct + indirect):		5,680,398.57	
	Est Cost at Completion (E\$AC):		5,684,252.51	
	Total Budget:		6,235,802.00	
	Variance (Total Budget minus- E\$AC):		551,549.49	
	Reason for Variance:	Main driver of underrun: Less interviewer effort & associated recharges/fees. Note: CRS has the main iw and saliva budgets loaded. Unable to separate Core IDC costs from Contact Update IDC costs. Cost values only reflect Direct Costs.		
Projections as of Nov 18, 2024	Dollars Projected for Month:		5,733.87	
	Actual Dollars Used:		2,627.74	
	Variance (Projected minus Actual):		3,106.13	
	Reason for Variance:	Less management time available to complete close out tasks. Note: Unable to separate Core IDC costs from Contact Update IDC costs. Cost values only reflect Direct Costs.		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:	9646	89%	6.58
	Current Actual:	9189	86%	5.59
	Estimate at Complete:			
	Variance:	457	3%	0.99
Other Measures	Notes for Measures Above: From Dashboard. Units Completed = 9189 iws (2476 CATI--27%, 6713 web--73%). Sample Invited = 10,928. BUDGET ASSUMPTIONS: Mode of completion: 60% web & 40% CATI; Of the web completes, 38% do not require any interviewer effort. HPI: 5.42 = CATI completes; 7.21 = web completes w/ interviewer follow-up; 10.17 = non-sample/non-iw. Additional 1.74 HPI for FTF NRFU cases.			

Project Name	(PSID25) Panel Study of Income Dynamics Core 2025 (On Track)		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 5,003,388.00	Indirect Budget: 2,801,897.00	Total Budget: 7,805,285.00
Principal Investigator/Clients	Tom Crossley (UM-SRC-PSID) Katherine McGonagle (UM-SRC-PSID) Narayan Sastry (UM-SRC-PSID)		
Funding Agency	NSF, NIA, NICHD		
IRB	HUM#: HUM00062417		Period of Approval:
Project Team	Project Lead: Rachel Anne Orlowski		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager: Stacy Quisenberry		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Maureen Joan O'Brien		
	Production Manager 2: Daric Thorne		
Proposal #	no data		
Description	<p>The Panel Study of Income Dynamics (PSID--also known to Respondents as the Family Economics Study or FES) is a longitudinal survey of several thousand individuals and their families, carried out since 1968 and conducted every two years. The sample is comprised of respondents from the 4,800 original families as well as new (immigrant) sample added in 1997/1999 and 2017/2019. The total 2025 sample size will be approx. 11,200, with approx. 10,000 completed interviews expected. Most of the information collected is about family composition and changes (marriages, divorces, births, deaths, people moving in and out); income sources and amounts; employment and pensions; and wealth. There are also questions about housing; education; vehicles; health; fertility; COVID-19; and money spent on food, healthcare, and school. The main focus is on how these family composition and financial factors interact with each other and how they change over time. The survey will be administered via web and telephone, with the expectation that more surveys will be completed via web than telephone.</p> <p>Talk about ancillary studies here.</p> <p>The 2023 waves of CDS and the Transition into Adulthood (TAS) will follow PSID Core data collection. CDS and TAS eligibility is dependent upon completion of PSID Core.</p>		
SRO Project Period	03/2024 - 09/2026		
Data Col Period	03/2025 - 03/2025		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 03/01/2024</div><div>Pretest End: 10/06/2024</div><div>Staffing Complete:</div><div>SS Train Start: 02/17/2025</div><div>DC Start: 03/03/2025</div></div> <div><div>Pretest Start: 09/16/2024</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End: 02/28/2025</div><div>DC End: 12/31/2025</div></div>		
Other Project Team Members	TSG Tech Leads - Jim Rodgers, Jeff Smith, & Karl Dinkelmann; Data Manager - Brad Goodwin & Ed Green; 68ID Site Programmer - Ashwin Dey; Blaise Programmer - Jude Perillo; MSMS Programmers - Pam Swanson & Darnell Christian; Help Desk - David Bolt & Kyle Goodman; Tech Support - Sarah Broumand & Jaime Koopman; Production Support: Lorraine Bird; Project Support - Saujanya Acharya, Janet McBride, & Xiomara Lorenzo-Guerra; Reporting, Mapping, & Sample Assignment - Ji Qi & Wen Chang		
Other Project Name	FES, Family Economic Study, PSID Core 2025		
Sample Mgmt System	MSMS; Project specific system (68ID Site)		
Data Col Tool	Blaise 5		
Hardware	Laptop; [UM cell] Phone		
DE Software	N/A		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, Other (Locator, Proxy)		
Administration	ISR Group (PSID)		
Payment Type	Check, post (Varies); Cash, post (Varies); Other (electronic, post--JP Morgan)		
Payment Method	Check through other system (PSID will handle check & e-payment via RAPS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (PSID will handle check & e-payment via RAPS)		

Report Period	Oct, 2024 (PSID25)	Implementing
Risk Level	On Track	
Monthly Updates	Summary of October 2025 activities:	
	Tech:	
	<p>MSMS - Pretest closed out on 10/7. Lines were moved to a review state. Final code outs for partials/completes/non-lws was initiated and completed. Production protocol, data, and DCA spec updates were provided to setup programmers on 10/17, with some template updates later delivered on 10/24. Not all templates were provided at this time, per current project processes they are still being finalized. Implemented new processes to better update template programming process for setup lwers and template developers using the Crosswalk and javascript apps. Project on schedule for Integration testing to begin week of 11/18. Specified a new Human Contact indicator for PSID study staff request, and added limited rules into project. Began meeting as a project team more regularly to review MSMS documentation, make minor revisions to process flow, and began working on some limited post-Int 1 MSMS updates. New VIN experiment fields added to dataspec. Made a mid-month update the the SAD files in the Pretest project to accommodate some necessary 68-ID site testing. Confirmed earlier in the month that project would not be completing a Tango card test in Core production this wave.</p> <p>Blaise - Pretest closed out on 10/7. Identified new issues with DIM which was preventing data from updating local session data in Web to CATI or CATI to subsequence CATI updates after a Web launch. Investigation into issue started, and determined that there was a bug in the dll released by CBS which caused this issue. Plan established to begin building a new/revised DIM. Identified new backups for primary Blaise programmer, and re-affirmed set of expected changes for more effective Production close out process including setting an administrative mode which allows for refusals, turns off nexting, and puts the IWPpartial question on route. Post-pretest specs were delivered by IDPM on time. Explored some blaise audit restoration processes to verify that no issues found as part of process. Planning for more complicated testing, based on some reports of missing data in blaise audit restores by DP. New VIN experiment discussed and confirmed by PIs, with plans beginning to incorporate.</p> <p>68-ID Site - New programmer was onboarded due to resource constraints, and given some time to better understand what needs to be completed on site. Established an ambitious schedule to complete outstanding work items on the 68-ID site broken into several milestones based, in part, on revisions being planned to the production environment. Specification was updated and reviewed, placing TL Work Plans as part of November/December milestones. Releases were provided with some basic locating structures, phone leads for locators, and some other features. Data manager was able to update the SAD file in MSMS to reflect some needed changes, and initial lines were released for basic testing of some new, required features.</p> <p>Reports - updates to reports ahead of production were being finalized, included the timing report. Initial drafts of release schedule provided, with DMSS programming the sample release assignment logic. Did discuss modifying 2023 RoadRunner report so PIs will be able to review previous wave roadrunner results compared to upcoming PSID 25 results from the English Web Releases that follow a similar structure.</p> <p>PI Decisions:</p> <p>On 10/1, SRO and PSID staff reviewed web authentication/re-authentication procedures w/ the PIs and confirmed plans for increased security across the Suite for 2025. On 10/1, SRO ad PSID reviewed communication protocols with the PIs--making the process more streamlined and comprehensive than in prior waves. Worked w/ PIs to finalize the design of a Vehicle Identification Number question experiment for Core 2025. The final day of Pretest data collection was 10/6. Completed 101 interviews and 2 partials due to technical issues. Held a Pretest Debriefing with the PIs and study staff on 10/9. Submitted a ORIO regarding a Respondent who filed a compliant against Core and CDS with the IRB; the IRB acknowledged the ORIO on 10/25. Began discussions with the PIs about monitoring a new metric, the coefficient of variations of the response propensity.</p> <p>Recruitment, Hiring, & Training:</p> <p>On 10/18, the on staff posting went live for PCs, TLs, locators, and interviewers. There will be three Core Production Trainings. The first two trainings' dates have been proposed and approved. T1 dates are 2/24/25-3/7/25, and T2 dates are 4/14/25-4/25/25. T1 and T2 trainings will be ½ days, weekdays only. Both T1 and T2 trainings will include technical systems training, protocols, family listing, and the Core interview. T1 will include about 3 lwers and 8 TLs/PCs, and T2 will include approximately 34 lwers. Only lwers conducting interviews will attend the second week of training. Both trainings will include OSers only. The T3 training dates are still under review. T3 will be held in-person, if new hires are needed. We hope to staff mostly on-staffers for all three trainings. If in person, 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. The team is working to finalize the training agenda and make materials and content assignments.</p>	
Special Issues		
Cost as of Nov 18, 2024	Total Cost to Date (direct + indirect):	867,465.91
	Est Cost at Completion (E\$AC):	8,228,173.86
	Total Budget:	7,805,285.00
	Variance (Total Budget minus- E\$AC):	-422,888.86
	Reason for Variance:	OCTOBER 2024 CRS 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 Nov 18, 2024	Dollars Projected for Month:	229,380.54
	Actual Dollars Used:	200,817.11
	Variance (Projected minus Actual):	28,563.43

Reason for Variance: OCTOBER 2024 CRS 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.

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: 171,983.00	Indirect Budget: 96,311.00	Total Budget: 268,294.00
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	<p>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.</p> <p>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.</p> <p>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 Accurant.</p>		
SRO Project Period	05/2024 - 11/2024		
Data Col Period	08/2024 - 10/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 05/01/2024 Pretest End: Staffing Complete: SS Train Start: 08/01/2024 DC Start: 08/05/2024 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 10/31/2024 </div> </div>		
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	Oct, 2024 (SAND COVID Follow-Up)	Implementing		
Risk Level	On Track			
Monthly Updates	<p>October Update</p> <p>Data Collection</p> <ul style="list-style-type: none">- At the end of October, the project completed 1072 interviews and a 44% response rate, which is 8% higher than the previous month. The average weekly completes for this October are tracking at 44 a week compared to 57 in September.- This month's outreach was a text message, email, and a phone call. A letter that includes a QR code for Rs to access their survey was added this month. The largest peaks in this month's production continue to take place around the days after emails and text messages are sent.- The locating cases now represent 19% of the sample, which is 8% less than the prior month. At least 73 respondents identified through locating efforts have finished their web survey.- Since training, there has been no interviewer attrition. <p>Data Management / Technical</p> <ul style="list-style-type: none">- Templates and data pulls needed to create and send batch emails.- Due to an upcoming retirement at the start of November, the lead Blaise programmer is actively training someone to take over programming tasks.- The development of the project FPR is operational and being actively used by the team. <p>Management Team</p> <ul style="list-style-type: none">- To help boost the project's response rate, SRO is in the process of estimating the cost of extending into the first week of December. The original protocol ended R outreach on 11/2. By adding 5 weeks to data collection, the project will add 3 emails and 3 text messages spread throughout the month of November and the start of December.			
Special Issues	Expired Survey Links: The SRO project team continued to receive respondent outreach about their link being expired. After working with Study Staff, it was determined that there were an additional 109 links that expired despite the expiration of 6 weeks being removed. These cases were identified using the distribution list, and once new links were created, they were sent out to Rs.			
Cost as of Nov 18, 2024	Total Cost to Date (direct + indirect):	197,264.24		
	Est Cost at Completion (E\$AC):	265,302.55		
	Total Budget:	268,294.00		
	Variance (Total Budget minus- E\$AC):	2,991.45		
	Reason for Variance:	Actual costs are expected to match closely to the estimated cost to complete.		
Projections as of Nov 18, 2024	Dollars Projected for Month:	53,689.88		
	Actual Dollars Used:	58,531.34		
	Variance (Projected minus Actual):	-4,841.46		
	Reason for Variance:	Actual costs include mailing costs not originally budgeted but approved by the PI staff. These costs included both the cost of materials and postage, along with all steps to put together the mailing.		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:	1072	44%	
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(SCA 2024) Surveys of Consumer Attitudes (On Track)		
Project Mode	Primary: Mail Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 696,383.00	Indirect Budget: 0.00	Total Budget: 696,383.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: William Keating Budget Analyst: Dean E Stevens Production Manager: Lisa J Carn Senior Project Advisor: Shonda R Kruger-Ndiaye Production Manager 1: Production Manager 2:		
Proposal #	no data		
Description	<p>The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations.</p> <p>The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 600 interviews.</p>		
SRO Project Period	01/2024 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: 01/02/2024 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 06/30/2024 </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	SMS		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; Desktop; [UM cell] Phone		
DE Software	NA		
QC Recording Tool	DRI-CXM		
Incentive	Not used		
Administration	N/A		
Payment Type	N/A		
Payment Method	N/A		
=====			
Report Period	Oct, 2024 (SCA 2024)	Closing	
Risk Level	On Track		
Monthly Updates	Additional costs for archiving or closing out the CATI project are not anticipated at this time.		
Special Issues			
Cost as of Nov 18, 2024	Total Cost to Date (direct + indirect):		679,896.96
	Est Cost at Completion (E\$AC):		679,896.96
	Total Budget:		696,383.00

	Variance (Total Budget minus- E\$AC):	16,486.04
	Reason for Variance:	The variance increase from Sept. 2024 to Oct. 2024 was caused by the less hours charged for archiving/closing out tasks than projected.
Projections as of Nov 18, 2024	Dollars Projected for Month:	502.45
	Actual Dollars Used:	271.84
	Variance (Projected minus Actual):	230.61
	Reason for Variance:	Less hours for archiving/closing out tasks than projected were charged.

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

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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	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	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	Oct, 2024 (SCA Web)		Closing
Risk Level	On Track		
Monthly Updates	The coding team completed 1,041 cases during the October 2024 calendar month. These figures do not include the number of cases randomly selected for IRR, but IRR statistics remain within expected ranges for the project.		

Special Issues

Cost as of Nov 08, 2024	Total Cost to Date (direct + indirect):	6,740.34
	Est Cost at Completion (E\$AC):	49,199.75
	Total Budget:	50,730.00
	Variance (Total Budget minus- E\$AC):	1,530.25
Reason for Variance:		Projections were increased for programmers in July, but the actual charged time during the October study month remained less than projected.

Projections as of Nov 08, 2024	Dollars Projected for Month:	10,629.62
	Actual Dollars Used:	6,740.34
	Variance (Projected minus Actual):	3,889.28
	Reason for Variance:	Projected hours for programmers were less than the number of hours budgeted. This is likely due to the instrument programming for the study month, which did not require many updates (rider questions remained in place).

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	<p>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.</p> <p>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</p>		
SRO Project Period	08/2024 - 03/2025		
Data Col Period	10/2024 - 12/2024		
Security Plan	NA		
Milestones	Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start:	Pretest Start: Recruitment Start: GIT Start: SS Train End: 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	Oct, 2024 (SCIP 2024)	Implementing
Risk Level	On Track	
Monthly Updates	We launched the data collection on October 7. However, we had some preload errors and Qualtrics App daily email limitations issues at the start. The project leads worked with the SRO leadership and notified the PIs, university leadership, and IRB about the incident. Concurrently, the project staff were able to triage and resolve the problems quickly. During October, we sent out invitations and then two reminder emails to the non-complete respondents. We set up daily field progress reports for internal users and weekly reports for the PIs. We also finalized the Qualtrics Tango Integration Application for the upcoming Tango \$5 offer reminders.	

Special Issues		
Cost as of Oct 31, 2024	Total Cost to Date (direct + indirect):	59,185.06
	Est Cost at Completion (E\$AC):	132,369.84
	Total Budget:	137,834.00
	Variance (Total Budget minus- E\$AC):	5,464.16
	Reason for Variance:	We have a favorable variance as of October 2024. We removed \$11,000 that was incorrectly added to the projection for respondent payments. We also adjusted staff hours based on their tasks needs. We will continue to make adjustments in the coming months.
Projections as of Oct 31, 2024	Dollars Projected for Month:	15,956.23
	Actual Dollars Used:	28,432.64
	Variance (Projected minus Actual):	-12,476.41
	Reason for Variance:	Data managers and Qualtrics programmer used more allocated hours because of unexpected sampling errors at the start of the data collection. Also, \$11,000 in respondent payment that was put in the Tango account in October in preparation for November Tango payments was not projected in October. This is a huge part of the perceived overrun for October. These projections will be spread over November and December and will reduce the overrun.

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 (On Track)		
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	<div> <div> Pre Production Start: 09/01/2022 Pretest End: Staffing Complete: 04/10/2023 SS Train Start: 05/18/2023 DC Start: 05/30/2023 </div> <div> Pretest Start: Recruitment Start: 02/01/2023 GIT Start: 05/16/2023 SS Train End: 05/25/2023 DC End: 12/31/2024 </div> </div>		
Other Project Team Members	Taghreid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall		
Other Project Name	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	Oct, 2024 (SRS 2021)		Implementing
Risk Level	On Track		
Monthly Updates	<p>SRS is doing fairly well. The field team met the goal of 1300 completed new-sample cases. Screening is continuing at a low level, and a few new sample cases are still being completed. We have authorized the field team to continue to screen and complete main interview cases in order to push the number of new sample completes as high as possible.</p> <p>Work on the panel sample continued to be a slog – almost 30% of the SRS panel sample were cases that did not</p>		

complete an interview during previous waves of data collection. Most of these cases are resistant, and some are highly resistant. An increase in the TOA (from \$100 to \$200) and the ability to offer a shorter, fully phone interview was approved at the end of October. Interviewers began contacting panel members with the new offer during the final days of October. A mailing was sent to all non-final cases during the first week of November announcing the increase in TOA and the ability to do a phone interview. We have finally seen production on the panel increase, however we do not think that we will reach the study goals. The PIs were informed of this again in the Nov 21, 2024 meeting.

The production goals for the end of the study are to maintain a consistent level of production and complete as many interviews as possible. If we are able to maintain a consistent level of interviewer effort, interviewing should wrap up at the end of December.

Special Issues	An ORIO will shortly be filed for a new-sample screening case who complained that we contacted them again after a refusal. The SRO team will review all outstanding new sample cases and begin coding out those that have refused participation. In addition, SRO will assist the research team by review all call records on the panel cases and recommending cases to be dropped from the panel. We have run across a number of respondents who assert that they have asked repeatedly to be removed from all mailings. There have been some very harsh refusals from the panel sample.	
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Cost as of Nov 18, 2024	Total Cost to Date (direct + indirect):	5,304,961.09
	Est Cost at Completion (E\$AC):	6,141,394.71
	Total Budget:	6,141,810.11
	Variance (Total Budget minus- E\$AC):	415.40
	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 Nov 18, 2024	Dollars Projected for Month:	274,656.42
	Actual Dollars Used:	204,836.12
	Variance (Projected minus Actual):	69,820.30
	Reason for Variance:	Interviewer hours were significantly lower than expected this month, likely due to consolidation of the screening staff and the priority that was place on completing convenience sample cases on D-AMP. Due to this, fewer hours were worked completing screening. We have adjusted interviewer hours accordingly.

Measures		Units at Complete	RR	HPI
	Current Goal:	1300 new/244 panel		
	Goal at Completion:	1300 new, 244 panel		
	Current Actual:	1318 new /149 panel	32% scr/53% main	8.3 new/15.0 panel
	Estimate at Complete:			
	Variance:			

Other Measures Production is shown as of 11/21/2024.

Project Name	(STARRS-LS Waves 3, 4, 5 (Yr1)) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study (On Track)		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 8,809,515.00	Indirect Budget: 4,920,601.00	Total Budget: 13,730,116.00
Principal Investigator/Clients	James Wagner (University of Michigan) Robert Ursano (Uniformed Services University of the Health Scienc) Murray Stein / Ron Kessler (University of California San Diego / Harvard)		
Funding Agency	Department of Defense		
IRB	HUM#: HUM00180765	Period of Approval: 3/21/24 - 3/20/25	
Project Team	Project Lead: Meredith A House Budget Analyst: William Lokers Production Manager: Ruth B Philippou Senior Project Advisor: Lisa S Holland Production Manager 1: Jeffrey Albrecht Jr Production Manager 2: Lisa M Lewandowski-Romps		
Proposal #	no data		
Description	<p>This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.</p> <p>For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data.</p> <p>To date, we have completed 2 waves of STARRS-LS interviewing. During Wave 1, we attempted to contact 50,000 individuals and completed approximately 14,500 full interviews. All Wave 1 participants that completed a full Wave 1 interview were asked to participate in Wave 2. Waves 3 and 4, which are covered in this application, will include the full STARRS-LS Wave 2 sample, regardless of whether they completed the interview.</p> <p>In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys).</p>		
SRO Project Period	05/2020 - 02/2025		
Data Col Period	11/2022 - 04/2024		
Security Plan	Yes		
Milestones	<div> <div> Pre Production Start: 04/01/2024 Pretest End: Staffing Complete: 10/29/2024 SS Train Start: 11/21/2024 DC Start: 11/11/2024 </div> <div> Pretest Start: Recruitment Start: 08/19/2024 GIT Start: 11/12/2024 SS Train End: 11/26/2024 DC End: 05/03/2026 </div> </div>		
Other Project Team Members	Ryan Yoder, Keith Liebetreu, Becky Loomis, Steven Sonoras, Andrew Piskorowski, Rose Zdybel, Ji Qi, Makenna Harrison, Lamont Manley, Lisa Van Havermaet, Stephanie Windisch, Youhong Liu, Peter Sparks. Shane Empie, 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	Oct, 2024 (STARRS-LS Waves 3, 4, 5)	Implementing
Risk Level	On Track	

Monthly Updates	<p>Project Management and Planning:</p> <ul style="list-style-type: none"> • We sent weekly production updates to the PIs, and reported on progress on the call with the Army/M&RA. • Meredith created the agenda/notes and facilitated the weekly meeting with the STARRS project managers. • Budget/Funding: <ul style="list-style-type: none"> o We took steps with U-M Office of Research and Sponsored Projects (ORSP) to close out the Year 4 award. o The final Year 5 subaward was received by ORSP on October 10. After both U-M and HJF signed, the subaward was finally activated on October 30. We began the process of setting up shortcodes, which are the account codes used by staff members to charge time and non-salary expenses. This process will take 1-2 weeks. 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 shortcodes once they are available. o We started work on the Year 6 (Wave 5 Yr2) budget, which is due to USUHS mid-November. • IRB: No activity this month. <p>Enclave and User Support:</p> <ul style="list-style-type: none"> • Annual security training renewal: the enclave security coordinator reached out to M&RA to confirm requirements for this yearly process. • Annual IA security review: We awaited word from M&RA and AAG about a possible upcoming site visit. • Annual NDI Data Request: <ul style="list-style-type: none"> o 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. o The CDC approved the application on October 11, but noted that for the next repeat request, we will need to obtain new agreements from all parties. They have modified the agreement language and would "like for everyone to be on board." o Meredith prepared the paperwork to accompany the submission file and Dr. Ursano signed the transmittal form. The secure file transfer to the CDC was completed on November 1. • Standard enclave activities continued. These include maintaining security requirements; processing background checks and Great Lakes Cluster (GLC) user access requests, drop box requests, ID swap and data transfer requests; managing software acquisition and updates; and providing user support as needed. Of particular note this month: <ul style="list-style-type: none"> o Onboarding of one U-M staff member was completed. o We awaited finalization of the DUA (for COVID data sharing) with a researcher at Mass General Brigham. o The team continued testing the new user support ticketing software (Team Dynamix). The target switch over date is November 18. • Biomarker group request for assistance: <ul style="list-style-type: none"> o STARRS genomic and survey variables to Yale: We awaited the requestor's confirmation of successful download of all files. o STARRS genomic, diagnostic and sociodemographic data sharing with DHA: <ul style="list-style-type: none"> ? We continued discussions, both internal and with the research team, 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). ? James responded to requests from the researcher for information about the process, timeline, and identifying variables/constructs of interest. <p>Public Use Data:</p> <ul style="list-style-type: none"> • The July-Sept 2024 quarterly ICPSR user report was sent to USUHS for the GSC on October 10. • Inventory document: <ul style="list-style-type: none"> o After providing additional information in response to questions from the research team about the inventory document contents (e.g., understanding some of the counts), Lisa Lewandowski-Romps circulated a revised draft with modifications to make counts/sample definitions more transparent in the documentation, including adding color-coding for unique sample counts by study. Color-coding should make it easier to locate the sample counts in the descriptive tables. o Dr. Stein reviewed and provided some comments. The U-M team responded to these in a final draft, which Dr. Stein approved on October 25. • We awaited decisions from the Army/GSC on producing the genetic and bioassay files for public use and placing data in the NIH National Data Archive and Public use release for GWAS. <p>Wave 4 Post-Production:</p> <ul style="list-style-type: none"> • U-M received Wave 4 weights/documentation, diagnostic algorithm documentation, and final annotated survey from Harvard. • The Wave 4 (LSW4) survey tables and MASTERID table were loaded to the enclave on October 25. <ul style="list-style-type: none"> o The MASTERID table update reflects the most current sample of administrative data linkage consenters. o There was one type 3 withdrawal during LSW4. As a result, this respondent's data and PII were removed from all STARRS data tables on the enclave. All relevant processing notes were also updated. • The team continued work on final documentation. 	
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Wave 5 Pre-Production:

- U-M team members attended the semi-annual Safety Plan meeting for Wave 5 with M&RA, USUHS staff, and the Office of the Chief of Chaplains.
- Initial processing steps (address locating via LexusNexus/Accurint and cell phone number validation via Aerialink) were completed for Replicates 1 and 2.
- The address file for mailing to Replicate 1 was created, letters were merged and sent to the U-M Print-Copy-Mail department for printing, assembly and mailing.
- The team continued preparations for interviewer and team leader trainings including hiring and staffing steps; coordinating with training and technical support teams; and finalizing materials such as manuals, presentations, training agendas, and supplemental resources.
- Wave 5 survey testing continued.
- Testing of the sample management system continued.
 - o The team completed a full systems integration test.
 - o We completed testing of the respondent login page for the web survey.
 - o We worked on a "production data test" (a test of systems with a set of real preload data)
 - The team continued work on QC systems, report development, and Wave 5 sample preload.
 - o We received Wave 5 survey preload from Harvard. U-M created preload values for consent questions and respondent age.

Special Issues

Language in the following area of risk has been updated slightly since last month:

- 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). It is uncommon for the SRC/ISR to authorize a hardship account for more than 2 (maybe 3) months in length. We have begun discussions with SRC/ISR in preparation for such a request.
 - ? 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, activated October 30, required 12 weeks of discussion. 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 Sep 30, 2024	Total Cost to Date (direct + indirect):	12,007,121.04
	Est Cost at Completion (E\$AC):	13,596,969.22
	Total Budget:	13,730,116.00
	Variance (Total Budget minus- E\$AC):	133,146.78

Reason for Variance: General underspending across salary groups. Projections updates this month included adjustments to a few staff members' projections (higher and lower) for staff leave time. We also learned that the SSL now considers it best/standard practice for TLs to attend the full IVer training. The STARRS team agrees this would be beneficial. We added TL hours for them to be able to attend the full IVer training.

Projections as of Sep 30, 2024	Dollars Projected for Month:	227,604.00
	Actual Dollars Used:	218,834.60
	Variance (Projected minus Actual):	8,769.40

Reason for Variance: Spending aligned pretty closely with what was expected.

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	Oct
TSME25 Blaise 5 (423562)	Initiatives	Initiation	Karl A Dinkelmann										
TSME25 DCO Systems Support (483248)	Initiatives	Implementing	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	Implementing	Karl A Dinkelmann										
TSME25 UI Testing Tool (423463)	Initiatives	Planning	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	<p>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 Empe to assist me in taking the lead on this initiative.</p>		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Shane Empe		
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	Oct, 2024 (TSME25 Blaise 5 (423562))		Initiation
Risk Level	On Track		
Monthly Updates	<p>We have been unable to spend time this month as project work has gotten in the way. We receive a beta version of Blaise 5.15 scheduled for 11/22, which we will begin evaluating what features and understand the scope of what we should be testing in the newest version of Blaise 5. Additionally, I have pulled in CRS data into this month's report.</p>		
Special Issues			
Cost as of Nov 10, 2024	Total Cost to Date (direct + indirect):		1,048.66

	<i>Est Cost at Completion (E\$AC):</i>			8,629.02
	<i>Total Budget:</i>			10,000.00
	<i>Variance (Total Budget minus- E\$AC):</i>			1,370.98
	<i>Reason for Variance:</i> n/a			
Projections as of Nov 10, 2024	<i>Dollars Projected for Month:</i>			2,307.07
	<i>Actual Dollars Used:</i>			1,048.66
	<i>Variance (Projected minus Actual):</i>			1,258.41
	<i>Reason for Variance:</i> n/a			
Measures		Units at Complete	RR	HPI
	<i>Current Goal:</i>			
	<i>Goal at Completion:</i>			
	<i>Current Actual:</i>			
	<i>Estimate at Complete:</i>			
	<i>Variance:</i>			
Other Measures				

Project Name	(TSME25 DCO Systems Support (483248)) TSME25 DCO Systems Support (483248) (Some Concerns)		
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	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Oct, 2024 (TSME25 DCO Systems Support)		Implementing
Risk Level	Some Concerns		
Monthly Updates	- Implemented revisions for FOTY 2025 - Worked on TeamTailor-Fred cross-walk view - Modified TeamTailor Resume Download module to save Resume File Name in the database - Investigated Display Name data issue when iwers enter non-characters in WA		
Special Issues			
Cost as of Nov 10, 2024	Total Cost to Date (direct + indirect):		12,217.15
	Est Cost at Completion (E\$AC):		47,744.90
	Total Budget:		40,000.00
	Variance (Total Budget minus- E\$AC):		-7,744.90
	Reason for Variance:		more development and support than budgeted

Projections as of Nov 10, 2024		Dollars Projected for Month:		7,038.05
		Actual Dollars Used:		3,305.38
		Variance (Projected minus Actual):		3,732.67
		Reason for Variance:		staff allocated to production projects
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

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	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	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	Oct, 2024 (TSME25 MSMS Line Generator	Planning	
Risk Level	On Track		
Monthly Updates	Work this month was put on hold until November due to other competing deadlines. No work completed in October.		
Special Issues			
Cost as of Nov 10, 2024	Total Cost to Date (direct + indirect):		425.00
	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:	Looks like an error in CRS system that is still counting hours that were removed from timesheets. This has been reported to Nicole Doher. The actual Total Cost to date should be closer to amount listed above. We don't anticipate going over budget.	
Projections as of Nov 10, 2024	Dollars Projected for Month:		523.55

Actual Dollars Used: 0.00

Variance (Projected minus Actual): 523.55

Reason for Variance: Unable to work on this task due to competing deadlines.

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

Other Measures

Project Name	(TSME25 MSMS Performance (425267)) TSME25 Mixed-mode systems dev support - Reliability & Performance (425267) (On Track)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 100,000.00	Indirect Budget: 0.00	Total Budget: 100,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Jim Rodgers		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	Mixed-mode systems dev support - Reliability & Performance		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Oct, 2024 (TSME25 MSMS Performance		Implementing
Risk Level	On Track		
Monthly Updates	Work is proceeding		
Special Issues			
Cost as of Nov 18, 2024	Total Cost to Date (direct + indirect):		24,179.76
	Est Cost at Completion (E\$AC):		79,951.27
	Total Budget:		100,000.00
	Variance (Total Budget minus- E\$AC):		20,048.73
	Reason for Variance:		Update
Projections as of Nov 18, 2024	Dollars Projected for Month:		7,457.82

Actual Dollars Used: -8,605.49

Variance (Projected minus Actual): 16,063.31

Reason for Variance: Update

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

Other Measures

Project Name	(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	<div> <div>Pre Production Start:</div> <div>Pretest End:</div> <div>Staffing Complete:</div> <div>SS Train Start:</div> <div>DC Start:</div> </div> <div> <div>Pretest Start:</div> <div>Recruitment Start:</div> <div>GIT Start:</div> <div>SS Train End:</div> <div>DC End:</div> </div>		
Other Project Team Members	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	Oct, 2024 (TSME25 ODS Data Dictionary)		Planning
Risk Level	On Track		
Monthly Updates	Sarah B. working on work plan and initial projections. Will meet with Grant B. (probably in Nov 2024) to understand detailed requirements of this project.		
Special Issues			
Cost as of Nov 10, 2024	Total Cost to Date (direct + indirect):		339.85
	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: Unable to work on this task as planned due to competing tasks		
Projections as of Nov 10, 2024	Dollars Projected for Month:		805.47
	Actual Dollars Used:		339.85

Reason for Variance:

Working on project plan

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	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	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	Oct, 2024 (TSME25 QC Systems)		Implementing
Risk Level	On Track		
Monthly Updates	This project has been focused on report work, fixing minor bugs and Brianna has started working on automating loading verification preload for SurveyTrak projects.		
Special Issues			
Cost as of Nov 10, 2024	Total Cost to Date (direct + indirect):		10,776.03
	Est Cost at Completion (E\$AC):		35,716.95
	Total Budget:		35,000.00
	Variance (Total Budget minus- E\$AC):		-716.95
	Reason for Variance:		minimal variance;
Projections as of Nov 10, 2024	Dollars Projected for Month:		3,451.09
	Actual Dollars Used:		3,130.17

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

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	<div> <div>Pre Production Start:</div> <div>Pretest End:</div> <div>Staffing Complete:</div> <div>SS Train Start:</div> <div>DC Start:</div> </div> <div> <div>Pretest Start:</div> <div>Recruitment Start:</div> <div>GIT Start:</div> <div>SS Train End:</div> <div>DC End:</div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Oct, 2024 (TSME25 System Maintenance -		Implementing
Risk Level	On Track		
Monthly Updates	<p>Here's a summary of the account charges without the hours included:</p> <p>483910-SRO Sys Maint:</p> <ul style="list-style-type: none"> - Check ST Employee Data Merge - CPS changes for both ST and MSMS - New SurveyTrak build - TREC - DRI Move utility to assist with TREC - New PFC PBLs explore - DRI Move setup/release - ST Employee Data Merge - ST25 - data check - WebTrak 25 - Letters module - Help team members get ST25 code set up - ST/PB Build Team meetings - SQLA17 scheduled tasks - Updated and released DB Reconcile application 		

- SRSM fix and release
- SQLA17 - Consents in ST, Supplemental Export, Web Log
- Project Removal/Equipment Return for SQLA17

Special Issues

Cost as of Nov 18, 2024	Total Cost to Date (direct + indirect):	14,412.48
	Est Cost at Completion (E\$AC):	46,388.39
	Total Budget:	35,000.00
	Variance (Total Budget minus- E\$AC):	-11,388.39
	Reason for Variance:	see below
Projections as of Nov 18, 2024	Dollars Projected for Month:	2,477.92
	Actual Dollars Used:	4,951.20
	Variance (Projected minus Actual):	-2,473.28
	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 Doherty 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	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Oct, 2024 (TSME25 Team Dynamix		Planning
Risk Level	On Track		
Monthly Updates	- Dave, Mike and Hueichun met to discuss the workscope and use cases for API integration. - Programmers started investigating the Team Dynamics API library and design of the SRO integration API. - Discussed the need for a *generic* email account as a place-holder to use when entering a new ticket at staging process. - Investigated the features of "not notifying requestor when using Add Ticket API".		
Special Issues			
Cost as of	Total Cost to Date (direct + indirect):		0.00
	Est Cost at Completion (E\$AC):		0.00
	Total Budget:		21,000.00
	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					

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	<p>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.</p>		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	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	Oct, 2024 (TSME25 Translation Tool)		Implementing
Risk Level	On Track		
Monthly Updates	Project work has prevented us from moving forward this month. However, we hope to finish our plan in December and present the scope of the work to a small group in January.		
Special Issues			

Cost as of Nov 10, 2024	Total Cost to Date (direct + indirect):	1,059.84
	Est Cost at Completion (E\$AC):	9,207.72
	Total Budget:	10,500.00
	Variance (Total Budget minus- E\$AC):	1,292.28
	Reason for Variance:	n/a

Projections as of Nov 10, 2024	Dollars Projected for Month:	0.00
	Actual Dollars Used:	201.50
	Variance (Projected minus Actual):	-201.50
	Reason for Variance:	n/a

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

Other Measures

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	<div>Pre Production Start:Pretest Start:Pretest End:Recruitment Start:Staffing Complete:GIT Start:SS Train Start:SS Train End:DC Start:DC End:</div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Oct, 2024 (TSME25 UI Testing Tool)		Planning
Risk Level	On Track		
Monthly Updates	<div>- Initiated the purchase process of Splunk- TSG Leadership team met to discuss the goals and plan for the UI Testing tools- TSG has started the review the different Testing Tools for Web and Window modules</div>		
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

<i>Actual Dollars Used:</i>				0.00
<i>Variance (Projected minus Actual):</i>				0.00
<i>Reason for Variance:</i>				na
Measures		Units at Complete	RR	HPI
	<i>Current Goal:</i>			
	<i>Goal at Completion:</i>			
	<i>Current Actual:</i>			
	<i>Estimate at Complete:</i>			
	<i>Variance:</i>			
Other Measures				