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## ***Survey Research Operations***

### ***Monthly Project Report***

***Sponsored Data Collection Projects and Development Initiative***

***December 2024***



## **Sponsored Data Collection Projects and Development Initiative Projects**

(ANES 2024) American National Election Studies - 2024  
(BFY) Baby's First Years  
(BHM Library Project) Developing a Model of Black History Month Programming in Public Libraries  
(CARE Military) Concussion Assessment, Research and Education (CARE) Consortium 2022 - Military  
(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022  
(CCS) Community College Survey  
(CVFS-SCAN) Chitwan Valley Family Study - Study on Cognition and Aging in Nepal  
(Health and Well Being in SE MI) Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan)  
(Healthy Brain Project) Healthy Brain Project  
(Hospitals Sharing Data) Hospitals Sharing Patient Data  
(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  
(MI CReSS CS) Michigan COVID-19 Recovery Surveillance Study Community Survey  
(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 Innovation Panel) Monitoring the Future: Young Adult Innovation Panel 2024  
(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  
(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 Web 2024) SCA Web 2024  
(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 Test and Splunk (423463)) TSME25 Automated UI Testing & Splunk Implementation (423463)

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

Project Name	(ANES 2024) American National Election Studies - 2024 (On Track)		
Project Mode	Primary: Web	Secondary: Face to Face	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 4,507,806.00	Indirect Budget: 2,418,434.00	Total Budget: 6,926,240.00
Principal Investigator/Clients	Nicholas A. Valentino (University of Michigan)		
	Shanto Iyengar (Stanford University)		
	D. Sunshine Hillygus (Duke University)		
Funding Agency	National Science Foundation (NSF)		
IRB	HUM#: HUM00226016		Period of Approval: Study is exempt
Project Team	Project Lead: Andrew L Hupp		
	Budget Analyst: William Lokers		
	Production Manager: Theresa Camelo		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1: Margaret Lavanger		
	Production Manager 2: Lisa Van Havermaet		
Proposal #	no data		
Description	The mission of the American National Election Studies (ANES) is to inform explanations of election outcomes by providing data that support rich hypothesis testing, maximize methodological excellence, measure many variables, and promote comparisons across people, contexts, and time. The ANES serves this mission by providing researchers with a view of the political world through the eyes of ordinary citizens.		
	SRO will be conducting the 2024 data collection.		
SRO Project Period	07/2023 - 01/2025		
Data Col Period			
Security Plan	NA		
Milestones	Pre Production Start: 03/01/2024		Pretest Start:
	Pretest End:		Recruitment Start:
	Staffing Complete:		GIT Start: 07/09/2024
	SS Train Start: 07/10/2024		SS Train End:
	DC Start: 08/01/2024		DC End: 03/31/2025
Other Project Team Members	Erin McSpadden - Project Manager for the methods pilot Sharon Parker - Production Manager for the methods pilot Raphael Nishimura - Sampling (pilot and production) Paul Burton - Sampling and Reporting Makenna Harrison - Sampling and Reporting Grace DesJardins - Project Support Marsha Skoman - SurveyTrak programming + Tech Lead Karl Dinkelmann - Blaise oversight + Tech Lead James Rodgers - MSMS + Tech Lead Ashwin Dey - WebTrak Pam Swanson - MSMS set-up programming Sarah Broumand - PQT and QC set-up Peter Sparks - Blaise programming Max Malhotra - Blaise programming Youhong Liu - Blaise programming Shanie Empie - Login portal Hueichun Peng - Self-scheduler Tony Romanowski - Technical specifications and testing Andrew Piskorowski - ODS Kelly Chatain - MSMS specs and testing Elizabeth Ohryn - Testing, SSL support William Lokers - Video interviewing coordination in SSL and field support		
Other Project Name			
Sample Mgmt System	SurveyTrak; MSMS		
Data Col Tool	Blaise 5; Other (PAPI)		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	External vendor (MSG)		
QC Recording Tool	Camtasia		

<b>Incentive</b>	Yes, R
<b>Administration</b>	SRO Group
<b>Payment Type</b>	Check, post (\$25/\$40 Escalation to \$100; \$150 for in-person); Cash, prepaid (\$5/\$10); Cash, post (Pre-Election token amount)
<b>Payment Method</b>	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)

<b>Report Period</b>	Dec, 2024 (ANES 2024)	Implementing
<b>Risk Level</b>	On Track	

<b>Monthly Updates</b>	<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: 844/938 (90.0%) 938 is a 90% reinterview rate from Pre  -357 In-person, 155 Telephone, 332 Video</p> <p>Web - Fresh 1,535/1,719 (89.3%) 1,719 is an 85% reinterview rate from Pre  Web - Panel 1,893/1,964 (96.9%) 1,964 is an 90% reinterview rate from Pre  Web - GSS 780/839 (93.0%) 888 is an 85% reinterview rate from Pre  Paper - 181/221 (81.9%) 221 is an 85% reinterview rate from Pre</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). That sample was released in late November. Data collection will extend into November to try and reach the re-interview goals.</p> <p>We will have a debriefing with the SRO team during one of the tech team meetings in February.</p>	
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<b>Special Issues</b>			
<b>Cost as of Jan 17, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>		6,065,134.15
	<b>Est Cost at Completion (E\$AC):</b>		7,635,954.96
	<b>Total Budget:</b>		6,926,240.00
	<b>Variance (Total Budget minus- E\$AC):</b>		-709,714.96
	<b>Reason for Variance:</b>	Project staff has received word from the funding agency that additional funds are available. Project staff will be transferring funds to cover the overrun.	
<b>Projections as of Jan 17, 2025</b>	<b>Dollars Projected for Month:</b>		939,713.21
	<b>Actual Dollars Used:</b>		852,543.33
	<b>Variance (Projected minus Actual):</b>		87,169.88
	<b>Reason for Variance:</b>	Unused projections were moved forward.	

Measures		Units at Complete	RR	HPI
	<b>Current Goal:</b>	1,200/938	See monthly update	10.5/6.0
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>	1,042/844		14.15/6.62
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			

<b>Other Measures</b>	
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<b>Project Name</b>	<b>(BFY) Baby's First Years (On Track)</b>												
<b>Project Mode</b>	Primary: Face to Face      Total of Modes: 1												
<b>Project Type</b>	Sponsored Projects												
<b>Budget</b>	<b>Direct Budget:</b> 6,571,291.56	<b>Indirect Budget:</b> 2,107,694.29	<b>Total Budget:</b> 8,678,985.85										
<b>Principal Investigator/Clients</b>	Dr. Greg Duncan (University of California - Irvine)												
	Dr. Kimberly Noble (Teachers College Columbia University)												
	Dr. Katherine Magnuson (University of Wisconsin)												
<b>Funding Agency</b>	National Institute of Child Health and Human Development (NICHD)												
<b>IRB</b>	<b>HUM#:</b> HUM00137963	<b>Period of Approval:</b>											
<b>Project Team</b>	<b>Project Lead:</b> Piotr Dworak												
	<b>Budget Analyst:</b> David Kellermeyer												
	<b>Production Manager:</b> Veronica Connors-Burge												
	<b>Senior Project Advisor:</b> Stephanie A Chardoul												
	<b>Production Manager 1:</b> Margaret Lavanger												
	<b>Production Manager 2:</b>												
<b>Proposal #</b>	no data												
<b>Description</b>	<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"> <li>• Baseline will occur immediately (within 24-48 hours) after birth, in the hospital;</li> <li>• Wave 1 will be a telephone interview with the mother when the child is 12 months old;</li> <li>• 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;</li> <li>• 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.</li> </ul> <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>												
<b>SRO Project Period</b>	10/2017 - 12/2020												
<b>Data Col Period</b>	04/2018 - 12/2020												
<b>Security Plan</b>	NA												
<b>Milestones</b>	<table border="0"> <tr> <td><b>Pre Production Start:</b> 10/01/2017</td><td><b>Pretest Start:</b></td></tr> <tr> <td><b>Pretest End:</b></td><td><b>Recruitment Start:</b> 01/01/2018</td></tr> <tr> <td><b>Staffing Complete:</b> 02/07/2018</td><td><b>GIT Start:</b> 03/19/2018</td></tr> <tr> <td><b>SS Train Start:</b> 03/20/2018</td><td><b>SS Train End:</b> 03/22/2018</td></tr> <tr> <td><b>DC Start:</b> 05/07/2018</td><td><b>DC End:</b> 06/30/2022</td></tr> </table>			<b>Pre Production Start:</b> 10/01/2017	<b>Pretest Start:</b>	<b>Pretest End:</b>	<b>Recruitment Start:</b> 01/01/2018	<b>Staffing Complete:</b> 02/07/2018	<b>GIT Start:</b> 03/19/2018	<b>SS Train Start:</b> 03/20/2018	<b>SS Train End:</b> 03/22/2018	<b>DC Start:</b> 05/07/2018	<b>DC End:</b> 06/30/2022
<b>Pre Production Start:</b> 10/01/2017	<b>Pretest Start:</b>												
<b>Pretest End:</b>	<b>Recruitment Start:</b> 01/01/2018												
<b>Staffing Complete:</b> 02/07/2018	<b>GIT Start:</b> 03/19/2018												
<b>SS Train Start:</b> 03/20/2018	<b>SS Train End:</b> 03/22/2018												
<b>DC Start:</b> 05/07/2018	<b>DC End:</b> 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)	
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Report Period	Dec, 2024 (BFY)	Implementing
Risk Level	On Track	
Monthly Updates	<p>BFY Age 5- 8:</p> <p>BFY has awarded SRO continuing work throughout Age 8 (August 2027).</p> <p>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.</p> <p>Lab recruitment outcomes: So far, we have invited 71% of 1,000 participants (n = 711) over to the lab representing 99% of eligible respondents (eligible given their age cohort). After sending cases over, iwers are also assisting lab in locating some hard-to-reach cases which may have been invited but then disappeared. As part of that effort iwers follow our standard locating steps but also may conducting FTF visits as appropriate.</p> <p>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.</p> <p>Age 5 Staffing:</p> <p>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.</p> <p>10 iwers in total NE: 1 OS (1 NH resigned) MN: 0 local (1 resigned) NY: 3 OS NOLA: 1 Locators: 2 TLs: 1</p> <p>Technical system: Working as expected.</p>	
Special Issues		
Cost as of Nov 30, 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 30, 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	<b>(BHM Library Project) Developing a Model of Black History Month Programming in Public Libraries (Some Concerns)</b>		
Project Mode	Primary: Web      Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	<b>Direct Budget:</b> 126,712.00	<b>Indirect Budget:</b> 70,959.00	<b>Total Budget:</b> 197,671.00
Principal	Deborah Robinson (ISR)		
Investigator/Clients			
Funding Agency			
IRB	<b>HUM#:</b>	<b>Period of Approval:</b>	
Project Team	<b>Project Lead:</b> Karin Schneider		
	<b>Budget Analyst:</b>		
	<b>Production Manager:</b>		
	<b>Senior Project Advisor:</b> Nicole G Kirgis		
	<b>Production Manager 1:</b>		
	<b>Production Manager 2:</b>		
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> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </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	Dec, 2024 (BHM Library Project)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Pi has asked for one-month extension of data collection period (from end of January to end of February). SRO involvement period will also be pushed back one month from February to March. Also, we are projecting the SSL hours for the mailing in the SRO budget. All non-salary costs for the mailing are being charged directly to the PI's shortcode.		
Special Issues	See above.		
Cost as of Jan 17, 2025	<b>Total Cost to Date (direct + indirect):</b>		161,191.72
	<b>Est Cost at Completion (E\$AC):</b>		213,043.10

<b>Total Budget:</b>		197,671.00		
<b>Variance (Total Budget minus- E\$AC):</b>		-15,372.10		
<b>Reason for Variance:</b>		Project extension, oversight of mailing activities requires additional mgmt time.		
<b>Projections as of Jan 17, 2025</b>	<b>Dollars Projected for Month:</b>	13,123.50		
	<b>Actual Dollars Used:</b>	9,483.27		
	<b>Variance (Projected minus Actual):</b>	3,640.23		
	<b>Reason for Variance:</b>	Some shift in hours required as data collection close will be pushed back a month.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
<b>Other Measures</b>				

<b>Project Name</b>	<b>(CARE Military) Concussion Assessment, Research and Education (CARE) Consortium 2022 - Military (On Track)</b>		
<b>Project Mode</b>	Primary: Web	Secondary: Telephone	Total of Modes: 2
<b>Project Type</b>	Sponsored Projects		
<b>Budget</b>	<b>Direct Budget:</b> 1,338,017.70	<b>Indirect Budget:</b> 347,885.00	<b>Total Budget:</b> 1,685,902.70
<b>Principal</b>	Dr. Steven Broglio (U of M Kinesiology)		
<b>Investigator/Clients</b>	Dr. Micheal McCreia /Dr. Pasquina (Medical College of Wisconsin/Uniformed Services Un)		
	Dr. Thomas McAllister (Indiana University School of Medicine)		
<b>Funding Agency</b>	NCAA and DoD		
<b>IRB</b>	<b>HUM#:</b> 00202691	<b>Period of Approval:</b> 7/23/2021 - open	
<b>Project Team</b>	<b>Project Lead:</b> Donnalee Ann Grey-Farquharson		
	<b>Budget Analyst:</b> David Kellermeyer		
	<b>Production Manager:</b> Barbara Aghababian-Homburg		
	<b>Senior Project Advisor:</b> Barbara Lohr Ward		
	<b>Production Manager 1:</b> Hongyu Johnson		
	<b>Production Manager 2:</b> Keith Liebetreu		
<b>Proposal #</b>	no data		
<b>Description</b>	<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>		
<b>SRO Project Period</b>	02/2022 - 03/2023		
<b>Data Col Period</b>	03/2022 - 08/2023		
<b>Security Plan</b>	NA		
<b>Milestones</b>	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
<b>Other Project Team Members</b>	Donnalee Grey-Farquharson, Barb Homburg, Hongyu Johnson, James Koopman, Keith Liebetreu, David Ackuaku, Ruyi Chen, David Kellermeyer		
<b>Other Project Name</b>	CARE-CSI Military		
<b>Sample Mgmt System</b>	Other (non-SRO)		
<b>Data Col Tool</b>	Other (non-SRO)		
<b>Hardware</b>	Laptop; [UM cell] Phone		
<b>DE Software</b>	N/A		
<b>QC Recording Tool</b>	N/A		
<b>Incentive</b>	Yes, R		
<b>Administration</b>	Other (Kinesiology)		
<b>Payment Type</b>	Check, post (\$150)		
<b>Payment Method</b>	Other (Kinesiology)		

Report Period	Dec, 2024 (CARE Military)		Implementing	
Risk Level	On Track			
Monthly Updates	<p>The SRO began working with the PI staff to pay respondents who were accepted as finalized partials interviews. We reduced hours to work on military samples in order to concentrate on civilian cases. We will continue to monitor productivity and make adjustments as needed.</p> <p>As of 12/31/2024, a total of 4285 military cases have been completed (DCP2+DCP3). In DCP3, a total of 9721 military samples were released, and a total of 952 cases were completed (908 Web and 44 CATI).</p>			
Special Issues				
Cost as of Dec 31, 2024	Total Cost to Date (direct + indirect):		1,684,473.95	
	Est Cost at Completion (E\$AC):		1,684,473.95	
	Total Budget:		1,685,902.70	
	Variance (Total Budget minus- E\$AC):		1,428.75	
	Reason for Variance:		<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><b>**Note:</b> In December 2024, we allocated \$29,252.11 to the Military project with the Civilian funds. This brings our cumulative spending on the military project to \$429,142.46 from April to December 2024. The current spending on Military is reflected the underrun amount in Civilian funds.</p>	
Projections as of Dec 31, 2024	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><b>**Note:</b> 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				

<b>Project Name</b>	<b>(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022 (On Track)</b>												
<b>Project Mode</b>	Primary: Telephone	Secondary: Web	Total of Modes: 2										
<b>Project Type</b>	Sponsored Projects												
<b>Budget</b>	<b>Direct Budget:</b> 3,718,978.00	<b>Indirect Budget:</b> 966,936.00	<b>Total Budget:</b> 4,685,914.00										
<b>Principal</b>	Dr. Steven Broglio (U of M Kinesiology)												
<b>Investigator/Clients</b>	Dr. Michael McCrea (Medical College of Wisconsin)												
	Dr. Thomas McAllister (Indiana University School of Medicine)												
<b>Funding Agency</b>													
<b>IRB</b>	<b>HUM#:</b> 00202691	<b>Period of Approval:</b> 7/23/2021 - open											
<b>Project Team</b>	<b>Project Lead:</b> Donnalee Ann Grey-Farquharson												
	<b>Budget Analyst:</b> David Kellermeyer												
	<b>Production Manager:</b> Barbara Aghababian-Homburg												
	<b>Senior Project Advisor:</b> Barbara Lohr Ward												
	<b>Production Manager 1:</b> Hongyu Johnson												
	<b>Production Manager 2:</b> Keith Liebetreu												
<b>Proposal #</b>	no data												
<b>Description</b>	<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 &gt;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>												
<b>SRO Project Period</b>	10/2021 - 08/2026												
<b>Data Col Period</b>	03/2022 - 02/2026												
<b>Security Plan</b>	NA												
<b>Milestones</b>	<table border="0"> <tr> <td><b>Pre Production Start:</b></td><td><b>Pretest Start:</b></td></tr> <tr> <td><b>Pretest End:</b></td><td><b>Recruitment Start:</b></td></tr> <tr> <td><b>Staffing Complete:</b></td><td><b>GIT Start:</b></td></tr> <tr> <td><b>SS Train Start:</b></td><td><b>SS Train End:</b></td></tr> <tr> <td><b>DC Start:</b></td><td><b>DC End:</b></td></tr> </table>			<b>Pre Production Start:</b>	<b>Pretest Start:</b>	<b>Pretest End:</b>	<b>Recruitment Start:</b>	<b>Staffing Complete:</b>	<b>GIT Start:</b>	<b>SS Train Start:</b>	<b>SS Train End:</b>	<b>DC Start:</b>	<b>DC End:</b>
<b>Pre Production Start:</b>	<b>Pretest Start:</b>												
<b>Pretest End:</b>	<b>Recruitment Start:</b>												
<b>Staffing Complete:</b>	<b>GIT Start:</b>												
<b>SS Train Start:</b>	<b>SS Train End:</b>												
<b>DC Start:</b>	<b>DC End:</b>												

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

<b>Report Period</b>	Dec, 2024 (CARE SALTOS MTEC)	Implementing
<b>Risk Level</b>	On Track	
<b>Monthly Updates</b>	<p>The SRO began working with the PI staff to pay respondents who were accepted as finalized partials interviews. The field teams continued to find ways to keep interviewers engaged and monitor productivity. The SRO team continued to work with the PI team and Datalys to resolve system technical issues and find ways to manage samples.</p> <p>As of 12/31/2024, a total of 6012 civilian cases have been completed (DCP2+DCP3). In DCP3, a total of 20087 civilian samples were released, and a total of 2706 cases were completed (2534 Web and 172 CATI).</p>	

<b>Special Issues</b>		
<b>Cost as of Dec 31, 2024</b>	<b>Total Cost to Date (direct + indirect):</b>	3,445,871.96
	<b>Est Cost at Completion (E\$AC):</b>	4,672,988.59
	<b>Total Budget:</b>	4,685,914.00
	<b>Variance (Total Budget minus- E\$AC):</b>	12,925.41
	<b>Reason for Variance:</b>	<p>We projected to extend production to July 2025 with the current state of the underrun. We will continue to make adjustments through the next month while monitoring productivity.</p> <p><b>**Note:</b> In December 2024, we allocated \$29,252.11 to the Military project with the Civilian funds. This brings our cumulative spending on the military project to \$429,142.46 from April to December 2024. The current spending on Military is reflected the underrun amount in Civilian funds.</p>

<b>Projections as of Dec 31, 2024</b>	<b>Dollars Projected for Month:</b>	141,153.65
	<b>Actual Dollars Used:</b>	119,215.68
	<b>Variance (Projected minus Actual):</b>	21,937.97
	<b>Reason for Variance:</b>	During December 2024, some of the interviewers were out on sick leave. As a result, they used less projected hours.

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

<b>Other Measures</b>	
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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)		
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Report Period	Dec, 2024 (CCS)		Closing
Risk Level	On Track		
Monthly Updates	In December, we closed out data collection (see below for final production outcomes). Several from the team gave a project closeout review presentation. Jeffrey wrote the field methods report and worked with Steven to address outstanding TOA inquiries from respondents. The remaining months (through April) will be dedicated to submitting 1-2 manuscripts for publication.		
Special Issues	No special issues to report.		
Cost as of Jan 13, 2025	Total Cost to Date (direct + indirect):		839,502.18

<b>Est Cost at Completion (E\$AC):</b>		865,405.61		
<b>Total Budget:</b>		644,889.00		
<b>Variance (Total Budget minus- E\$AC):</b>		-59,822.61		
<b>Reason for Variance:</b>		The project remains just under the expected \$60,000 overrun.		
<b>Projections as of Jan 13, 2025</b>	<b>Dollars Projected for Month:</b>	33,990.69		
	<b>Actual Dollars Used:</b>	35,261.51		
	<b>Variance (Projected minus Actual):</b>	-1,270.82		
	<b>Reason for Variance:</b>	Costs were higher than expected in December, because some interviewer hours were late to hit in CRS.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>	2834	62.8%	N/A
	<b>Variance:</b>			
<b>Other Measures</b>	The Wave 3 RR for the core sample (1,256 who completed each wave) was 88.3%.			



Project Name	(CVFS-SCAN) Chitwan Valley Family Study - Study on Cognition and Aging in Nepal (On Track)		
Project Mode	Primary: Face to Face      Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 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	<p>SRO is working cooperatively with the PIs and their research team as well as the Institue for Social and Environmental Research – Nepal – ISERN – to provide consultation, programming and support for data collection over 2 waves of interviewing.</p> <p>SRO will provide support in the following areas: instrument programming and testing, sample management system programming and testing, and data delivery.</p>		
SRO Project Period	07/2024 - 03/2025		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 08/01/2024  Pretest End: 10/31/2024  Staffing Complete:  SS Train Start: 02/03/2025  DC Start: 02/19/2025 </div> <div> Pretest Start: 10/15/2024  Recruitment Start:  GIT Start: 12/26/2024  SS Train End: 02/12/2025  DC End: </div> </div>		
Other Project Team Members	Technical Lead: Jennie Williams, TSG Programmer Analyst-Blaise: Peter Sparks, Karl Dinkelman, 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		
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Report Period	Dec, 2024 (CVFS-SCAN)		Implementing
Risk Level	On Track		
Monthly Updates	Project Updates:		
	Pretest is done now and some changes were made to the production protocols as a result. The following changes		

were made:

- There will no longer be 2 Informants nominated, only one. Pretest found that nominated informants lived with Rs most of the time, or were in daily contact and were willing to participate.
- The Respondent questionnaire was split into two 'sittings' due to length. Each sitting will take approximately 90 minutes and will be completed on different days. Part 1 of the questionnaire includes the Informant selection and the Cognition tasks, and Part 2 is demographics.

Questionnaire updates have been made in Blaise and are being tested, in addition to systems updates to account for two Blaise instruments in one project, and managing completion. Questionnaire translations are completed and in Blaise. Final testing is being done and training freeze is tomorrow, 1/22.

Training materials and slides are being finalized and translated into Nepali for the early February training. SRO will train ISER-N on the cognitive assessments, Inf questionnaire, SRO systems (Surveytrak, Webtrak, WebLog, FUM), and data management. ISER-N will conduct GIT prior to SRO's arrival in Nepal. Final edits are being made to the training agenda, and ISER-N staff are being assigned as training room leads. Ann Arbor staff will float and ensure the training rooms are staying on track. The project lead will follow along on a Surveytrak laptop viewing the same slides in English.

Attention will turn to completing the programming and testing for Part 2 (demographics). ISER-N will train on this after SRO staff train, as well as the Informant interview. The final portion of development and training will be to finalize the WBD, health questionnaire, and LHC sections. ISER-N will train on those sections but SRO will assist in systems development to support these. ISER-N does not have a definitive production launch date. Will continue to encourage ISER-N to finalize these dates and stick to timeline.

<b>Special Issues</b>	Blaise programming delays, Pretest delays,			
<b>Cost as of Jan 17, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	188,616.77		
	<b>Est Cost at Completion (E\$AC):</b>	541,405.18		
	<b>Total Budget:</b>	575,439.00		
	<b>Variance (Total Budget minus- E\$AC):</b>	34,033.82		
	<b>Reason for Variance:</b>	Costs have been extended through 10/2027 to include both projections for both Wave 1 and Wave 2. We will continue to review and fine-tune monthly projections as Wave 1 end date and Wave 2 dates are finalized.		
<b>Projections as of Jan 17, 2025</b>	<b>Dollars Projected for Month:</b>	36,042.74		
	<b>Actual Dollars Used:</b>	38,036.33		
	<b>Variance (Projected minus Actual):</b>	-1,993.59		
	<b>Reason for Variance:</b>	There was a slight December overrun due to tech staff working more to finalize Blaise and systems programming and testing for the early Feb training.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
<b>Other Measures</b>				

Project Name	(Health and Well Being in SE MI) Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan) (On Track)		
Project Mode	Primary: Face to Face	Total of Modes: 1	
Project Type	Sponsored Projects		
Budget	Direct Budget: 2,409,055.00	Indirect Budget: 1,349,072.00	Total Budget: 3,758,127.00
Principal	Kristine Ajrouch (Life Course Development Program, SRC)		
Investigator/Clients	Toni Antonucchi (Life Course Development Program, SRC)		
	Laura Zahodne (Life Course Development Program, SRC)		
Funding Agency			
IRB	HUM#: HUM00146040	Period of Approval: 4/9/2020	
Project Team	Project Lead: Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Taghreid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 600 interviews with recently identified Arab Americans aged 65 or older residing in Southeast Michigan and 330 interviews with Social Relations sample members aged 65 or older. The Arab American sample will be selected based on an in-person household screening. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements. Social Relations respondents will only complete the cognitive interview. An informant interview will also be conducted for all sample members. Interviews will be conducted in English or Arabic.		
SRO Project Period	05/2019 - 03/2023		
Data Col Period	05/2023 - 03/2024		
Security Plan	No		
Milestones	Pre Production Start: 12/01/2022 Pretest End: Staffing Complete: 04/10/2023 SS Train Start: 05/18/2023 DC Start: 05/30/2023 Pretest Start: Recruitment Start: 02/01/2023 GIT Start: 05/16/2023 SS Train End: 05/25/2023 DC End: 03/15/2025		
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)		
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Report Period	Dec, 2024 (Health and Well Being in SE MI)		Implementing
Risk Level	On Track		
Monthly Updates	D-AMP/Healthy Brain convenience sample continued to go well during December. The interviewing team primarily worked on Convenience and panel samples, offering the end-game incentive to the April panel release participants. Prenotification letters for the new release (n = 256, no end game incentive) went out on December 17. The revised team goal is to interview 200 panel sample members. We believe that we will hit that number in late January 2025 and we will continue to interview through the end of February, attempting to push past goals on the convenience sample, panel sample and if possible, new sample cases.		

We are still projecting underruns on both D-AMP and Healthy Brain, given the relative efficiency of the convenience sample compared to other sample cases. Last month we used projected underruns to extend data collection, which will give us more time to work the panel sample. The risk to extending data collection is that there may not be enough viable sample to work. We will work with the PIs to determine when to stop interviewing.

The interviewing team was consolidated in early January, concurrent with the end of interviewing on SRS. We will continue to monitor interviewer and TL hours as we work through the remaining sample.

The PI's were granted another no-cost-time extension for D-AMP, extending the project to 5/31/2026. Although we are projecting an underrun, we are carefully monitoring the draw-down of funds in order to ensure that we spend the D-AMP funds down as much as possible. We are still having a difficult time ensuring that interviewers charge their time and expenses (including R payments) appropriately across the projects. We will need to process journal entries to correct misallocation of R payments and interviewer travel.

We prepared and submitted an amendment for D-AMP and SRS to outline handling of refusal cases. This was submitted in early January. The D-AMP ORIO and amendment were approved (with one contingency) on January 20. The contingency is related to the Co-PI's failure to complete PEERRS training (expired mid-November 2024). We are continuing to monitor panel cases and will classify panel case refusals according to whether they should be removed from the sample overall versus refusing for the current wave of production. The list of removals will be provided to the PIs with the final deliverables.

#### Special Issues

<b>Cost as of Jan 17, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	3,467,658.08
	<b>Est Cost at Completion (E\$AC):</b>	3,739,704.47
	<b>Total Budget:</b>	3,758,127.00
	<b>Variance (Total Budget minus- E\$AC):</b>	18,422.53
	<b>Reason for Variance:</b>	The variance is due to the efficiency in the convenience sample. We projected 7.5 hours per complete, and it is coming in at 3.8 hours per complete.
<b>Projections as of Jan 17, 2025</b>	<b>Dollars Projected for Month:</b>	134,322.94
	<b>Actual Dollars Used:</b>	109,188.36
	<b>Variance (Projected minus Actual):</b>	25,134.58
	<b>Reason for Variance:</b>	The variance is largely due to a missed projection on Respondent Payments. We are still struggling with having interviewers and TLs understand how to charge their time, travel expenses and R payments to the two projects. In late December we gave interviewers a spreadsheet to calculate the split. We hope this will improve the situation in the field.

Measures		Units at Complete	RR	HPI
	<b>Current Goal:</b>	200/400/200 design		9.0 new/ 9.0 panel
	<b>Goal at Completion:</b>	200/400/200 design		
	<b>Current Actual:</b>	234/415/201	39% scnr; 48% main	8.4 new/16.2 panel
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			

#### Other Measures

Actuals are as of 1/21/2025. The budgeted HPI for the convenience sample was 6.5 HPI plus 1 HPI for the informant. We are running at 3.8 HPI for the convenience sample.

Project Name	(Healthy Brain Project) Healthy Brain Project (On Track)		
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)		
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Report Period	Dec, 2024 (Healthy Brain Project)		Implementing
Risk Level	On Track		
Monthly Updates	The D-AMP/Healthy Brain data collection period was extended to run through the end of February. This will allow the team to reach and exceed the goal of completing 200 panel sample cases. We are still projecting an underrun on the Healthy Brain study despite extending data collection. The underrun stems from the unexpected efficiency in the convenience sample.		

We are still having a difficult time ensuring that interviewers charge their time and expenses (including R payments) appropriately across the projects. We will need to process journal entries to correct misallocation of R payments and interviewer travel. The imbalance in how interviewers and some Ann Arbor staff are charging their time has caused large variances in monthly projections between D-AMP and Healthy Brain. In late December we gave interviewers and TLs a spreadsheet to calculate how to split their time for the pay period. We are starting to see a more balanced spread of interviewer hours (and hopefully interviewer travel/R payments) to both 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

<b>Cost as of Jan 17, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	968,941.42
	<b>Est Cost at Completion (E\$AC):</b>	1,501,308.20
	<b>Total Budget:</b>	1,537,306.00
	<b>Variance (Total Budget minus- E\$AC):</b>	35,997.80
	<b>Reason for Variance:</b>	The underrun on HB is due to the unexpected efficiency on the convenience sample, which has a much lower HPI than was anticipated, as well as lower travel costs.

<b>Projections as of Jan 17, 2025</b>	<b>Dollars Projected for Month:</b>	95,188.47
	<b>Actual Dollars Used:</b>	79,245.49
	<b>Variance (Projected minus Actual):</b>	15,942.98

**Reason for Variance:** This significant variance is due to a missed projection on respondent payments and interviewer travel. Interviewers and TLs are still struggling to charge time and expenses appropriately between the D-AMP and Healthy Brain project. In late December, we gave the interviewers and TLs a tool to use to split their time and expenses between projects. We hope that this will help charges be split more appropriately across projects.

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

**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	(Hospitals Sharing Data) Hospitals Sharing Patient Data (On Track)		
Project Mode	Primary: Web	Secondary: Mail	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 130,484.00	Indirect Budget: 73,070.00	Total Budget: 203,554.00
Principal	Kayte Spector-Bagdady (UM Medical School )		
Investigator/Clients			
Funding Agency	NIH		
IRB	HUM#: HUM00251017		Period of Approval: IRB Exempt
Project Team	Project Lead: Erin McSpadden		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager: Lisa J Carn		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>The Hospitals Sharing Patient Data project aims to collect data about how hospitals share their patient data with outside commercial entities in order to shed light on current hospital practices to inform improved policy in the future. The study is funded by the National Institutes of Health through an R01 grant. This project is a survey of hospital chief information officers and data administrators from a sample of around 600 hospitals across the the United States. The goal is to collect surveys from 50% of sampled hospitals. The survey is a 15-minute web survey administered via Qualtrics. Targeted representatives at each hospital will be mailed an invitation letter with a QR code to complete a web survey along with a \$50 token of appreciation. Targeted individuals who do not complete the survey will receive a reminder letter with a paper copy of the survey with the option to complete it and return the paper survey using a self-addressed stamped envelope. the SSL will be completing reminder calls to any targeted representative who still has not completed the survey after the reminder protocol. Interviewers in the SSL will have the ability to complete CATI interviewers with any targeted contact reached by phone, as well as updating and filling in any missing contact information from the sample. SSL sample will be managed using WebSMS. The web survey will launch in February 2025 with the SSL effort launching in March 2025. Data collection will end during the month of June 2025. This research has been classified as exempt by the UM MED IRB.</p>		
SRO Project Period	12/2024 - 09/2025		
Data Col Period	02/2025 - 06/2025		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 02/01/2025   Pretest End:   Staffing Complete:   SS Train Start: 03/06/2025   DC Start: 02/10/2025 </div> <div> Pretest Start:   Recruitment Start: 01/24/2025   GIT Start:   SS Train End: 03/06/2025   DC End: 06/30/2025 </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	Web SMS		
Data Col Tool	Other (Qualtrics)		
Hardware	Desktop; Paper and Pencil; Other (SSL Phones)		
DE Software	Other (Qualtrics)		
QC Recording Tool	N/A		
Incentive	Yes, INF		
Administration	UM Group (Payments handled by PI's research staff )		
Payment Type	Cash, prepaid (\$50)		
Payment Method	Other (Cash payments from HSIP handled by PI's research staff)		
=====			
Report Period	Dec, 2024 (Hospitals Sharing Data)		Planning
Risk Level	On Track		
Monthly Updates	Received final version of questionnaire and draft respondent materials from PIs. Currently working on		

programming and testing Qualtrics survey and WebSMS sample management systems. Study team is also working on revising and creating additional respondent materials. SSL staff posting is up and staff recruitment is underway. Project is on-track to launch the web survey in February and the SSL follow-up call effort in March.

<b>Special Issues</b>	Concerns about meeting the 50% response rate goal given the contact information in the Sample file. Due to recent current events, project team is concerned that medical executives may not be willing to give updated contact information and that online contact information may have been removed due to security concerns.		
<b>Cost as of Jan 17, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	5,250.10	
	<b>Est Cost at Completion (E\$AC):</b>	178,455.44	
	<b>Total Budget:</b>	203,554.00	
	<b>Variance (Total Budget minus- E\$AC):</b>	25,098.56	
	<b>Reason for Variance:</b>	Project budget and initial projections were just loaded and projections are still being revised as staff are named and estimates provided.	
<b>Projections as of Jan 17, 2025</b>	<b>Dollars Projected for Month:</b>	13,045.06	
	<b>Actual Dollars Used:</b>	5,250.10	
	<b>Variance (Projected minus Actual):</b>	7,794.96	
	<b>Reason for Variance:</b>	Work for this project was just being initiated in December. Projections were preliminary and will be pushed forward.	

Measures		Units at Complete	RR	HPI
	<b>Current Goal:</b>	300	50%	
	<b>Goal at Completion:</b>	300	50%	
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			

Other Measures



Project Name	(HRS 2022 Panel & Baselines) Health and Retirement Study 2022 Main Interviews (Some Concerns)		
Project Mode	Primary: Mixed      Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	Direct Budget: 13,982,815.00	Indirect Budget: 5,033,815.00	Total Budget: 19,016,630.00
Principal Investigator/Clients	David Weir (ISR-SRC)		
Funding Agency			
IRB	HUM#: HUM000611128		Period of Approval: 6/7/2023-6/6/2024
Project Team	<b>Project Lead:</b> Evanthia Leissou <b>Budget Analyst:</b> David Kellermeyer <b>Production Manager:</b> Andrea Sims <b>Senior Project Advisor:</b> Nicole G Kirgis <b>Production Manager 1:</b> Jennifer C Arrieta <b>Production Manager 2:</b> 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 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.</p>		
SRO Project Period	01/2021 - 12/2023		
Data Col Period	03/2022 - 06/2025		
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b> 01/01/2021  <b>Pretest End:</b> 11/23/2021  <b>Staffing Complete:</b> 01/15/2022  <b>SS Train Start:</b> 02/23/2022  <b>DC Start:</b> 03/07/2022 </div> <div> <b>Pretest Start:</b> 11/01/2021  <b>Recruitment Start:</b> 08/01/2021  <b>GIT Start:</b> 02/21/2021  <b>SS Train End:</b> 03/03/2022  <b>DC End:</b> 07/27/2025 </div> </div>		
Other Project Team Members	<p>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)</p> <p>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</p> <p>Coding Lead: Carolyn Vieira-Martinez</p>		
Other Project Name	HRS 2022 Main lws		
Sample Mgmt System	SurveyTrak; MSMS		
Data Col Tool	Blaise 5; SAQ		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Blaise 5 Coding Application); External vendor (DataForce)		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	NA		
Payment Type	Check, prepaid (\$80 (Panel)); Check, post (\$50 (WBD)); Cash, post (\$20 (SAQ), \$100 (Baselines) )		
Payment Method	Check through STrak RPay System; Check through other system (Rpay system set up for MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (Rpay system set up for MSMS); Imprest Cash Fund from ISR Business Office (Rpay system set up for MSMS)		

<b>Report Period</b>	Dec, 2024 (HRS 2022 Panel & Baselines)			Implementing
<b>Risk Level</b>	Some Concerns			
<b>Monthly Updates</b>	<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, implementing the baseline endgame protocols, and preparing an IRB amendment for the web baseline protocol.</p> <p>2. The technical team began working on MSMS and STak specifications for the web baseline protocol.</p> <p>3. Interviewers worked fewer hours than projected and did not meet baseline interview goals during December. Interviewers averaged 32 baseline iws/week.</p> <p>4. Strategies in play to boost EGenX production:</p> <ul style="list-style-type: none"> <li>- Offering proxy option for 2nd R in household,</li> <li>- Re-released EGenX endgame sample</li> <li>- Applying the "treatment protocol" from the endgame experiment to all non-final cases</li> <li>- Prioritizing baselines vs screening at the PSU level</li> <li>- Preparing of additional screener sample for release in January to help increase amount of eligible baseline sample in the field.</li> </ul> <p>*The "measures" table reflects Panel and Baseline combined as of 1/18/2025. Breakdown of Panel and Baseline counts and rates in Other Measures Field.</p>			
<b>Special Issues</b>	Currently estimating a shortfall of ~308 EGenX baseline interviews based on limiting production to budgeted interview hours.			
<b>Cost as of Jan 17, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>			18,089,334.12
	<b>Est Cost at Completion (E\$AC):</b>			18,086,668.52
	<b>Total Budget:</b>			19,016,630.00
	<b>Variance (Total Budget minus- E\$AC):</b>			929,961.48
	<b>Reason for Variance:</b>			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.
<b>Projections as of Jan 17, 2025</b>	<b>Dollars Projected for Month:</b>			-408.00
	<b>Actual Dollars Used:</b>			-409.75
	<b>Variance (Projected minus Actual):</b>			1.75
	<b>Reason for Variance:</b>			Minimal Variance
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>	19,910	51%	12.5
	<b>Goal at Completion:</b>	22,215	44%	8.3
	<b>Current Actual:</b>	19,925	52%	12.5
	<b>Estimate at Complete:</b>	20,912	42%	9.8
	<b>Variance:</b>	1,303	2%	1.5
<b>Other Measures</b>	<p>Baselines:</p> <ul style="list-style-type: none"> <li>-EGenX generated from screener: Goal: 4,003 iws; Current: 2,940 iws from 10,926 lines spawned; RR: 27.2%.</li> <li>-MOC: Goal: 2,000 iws; Final: 2,047 iws (36.4% RR). End date 11/15/2024</li> <li>-2019 EGenX baselines: Goal: 468 iws, Final: 497 iws (74.4% RR). End date 5/29/2024</li> <li>Panel: Revised RR Goal: 68% (original goal 74%), Final: 14,441 iws (68% RR). End date 9/2/23</li> </ul>			

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	<b>Project Lead:</b> Evanthia Leissou <b>Budget Analyst:</b> David Kellermeyer <b>Production Manager:</b> Andrea Sims <b>Senior Project Advisor:</b> Nicole G Kirgis <b>Production Manager 1:</b> Derek Dubuque <b>Production Manager 2:</b> 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> <b>Pre Production Start:</b> 05/15/2023  <b>Pretest End:</b> 02/18/2024  <b>Staffing Complete:</b> 03/15/2024  <b>SS Train Start:</b> 04/23/2024  <b>DC Start:</b> 05/13/2024 </div> <div> <b>Pretest Start:</b> 01/29/2024  <b>Recruitment Start:</b> 12/19/2023  <b>GIT Start:</b> 04/22/2024  <b>SS Train End:</b> 04/29/2024  <b>DC End:</b> 07/05/2025 </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		
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Report Period	Dec, 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.

-Datamodel 4 was delivered to SRO and the tech team began preparing it for testing in SurveyTrak and MSMS. This datamodel includes programming for the Prescription Drug/Lab Results Linkage experiment which will be administered during in-person and web interviews.

-1,521 additional cases were released to the field on December 9. This was the final sample release to the field staff via SurveyTrak.

-Web Panel production began December 16th with the release of 300 cases in MSMS. The remaining 2,918 cases will be released after upgrading to datamodel 4.

-Interviewers exceeded hours projections and were above the interview goal for three out of five weeks in December. HPI was higher than projected each week due to an increase in FTF attempts.

Measures in table below are as of 1/18/25 (week 36).

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 ~2,000 interviews short of the 70% RR goal.		
Cost as of Jan 21, 2025	Total Cost to Date (direct + indirect):		12,164,721.61
	Est Cost at Completion (E\$AC):		21,452,856.68
	Total Budget:		21,477,508.00
	Variance (Total Budget minus- E\$AC):		24,651.32
	Reason for Variance:	Minimal variance.	
Projections as of Jan 21, 2025	Dollars Projected for Month:		2,023,552.81
	Actual Dollars Used:		1,392,479.86
	Variance (Projected minus Actual):		631,072.95
	Reason for Variance:	Variance is primarily due to the hotel invoice from the training did not hit in December as projected and fewer staff hours due to more vacation time taken around the holidays than originally projected. Another contributing factor is that recharges had to be run early in December due to the holiday so the full amount did not hit. Future projections have been adjusted. The variance is mainly because the hotel invoice for the training was not processed in December as expected, and fewer staff hours were recorded due to more vacation time taken during the holidays. Additionally, early processing of recharges in December meant the full amount was not reflected. Future projections have been adjusted accordingly.	

Measures		Units at Complete	RR	HPI
	Current Goal:	7,930	34.9%	11.0
	Goal at Completion:	15,758	70%	9.3
	Current Actual:	7,930	34.9%	10.9
	Estimate at Complete:	13,602	60%	10.1
	Variance:	2,156	10%	-0.8

Other Measures

<b>Project Name</b>	<b>(HRS2022-Screening) HRS 2022 - Screening (Some Concerns)</b>		
<b>Project Mode</b>	Primary: Face to Face	Secondary: Telephone	Total of Modes: 3
<b>Project Type</b>	Sponsored Projects		
<b>Budget</b>	<b>Direct Budget:</b> 21,264,149.00	<b>Indirect Budget:</b> 7,655,093.00	<b>Total Budget:</b> 28,919,242.00
<b>Principal Investigator/Clients</b>	David Weir (SRC) Helen Levy (SRC) Ken Langa (SRC)		
<b>Funding Agency</b>			
<b>IRB</b>	<b>HUM#:</b>	<b>Period of Approval:</b>	
<b>Project Team</b>	<b>Project Lead:</b> Evanthia Leissou <b>Budget Analyst:</b> Richard Warren Krause <b>Production Manager:</b> <b>Senior Project Advisor:</b> Nicole G Kirgis <b>Production Manager 1:</b> Andrew L Hupp <b>Production Manager 2:</b> Theresa Camelo		
<b>Proposal #</b>	no data		
<b>Description</b>	<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>		
<b>SRO Project Period</b>	02/2021 - 08/2024		
<b>Data Col Period</b>	03/2022 - 06/2024		
<b>Security Plan</b>	NA		
<b>Milestones</b>	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> 04/19/2022 </div> <div style="width: 45%;"> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
<b>Other Project Team Members</b>			
<b>Other Project Name</b>			
<b>Sample Mgmt System</b>	SurveyTrak; MSMS; Other ((Blaise) Case Management App (CMA))		
<b>Data Col Tool</b>	Blaise 5		
<b>Hardware</b>	Laptop; [UM cell] Phone; Paper and Pencil		
<b>DE Software</b>	Other (Blaise 5 web instrument); N/A		
<b>QC Recording Tool</b>	Camtasia; N/A		
<b>Incentive</b>	Yes, R; Yes, INF		
<b>Administration</b>	SRO Group		
<b>Payment Type</b>	Check, post; Cash, prepaid (\$2); Cash, post		
<b>Payment Method</b>	Check through STak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office		
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<b>Report Period</b>	Dec, 2024 (HRS2022-Screening)		Implementing
<b>Risk Level</b>	Some Concerns		
<b>Monthly Updates</b>	<p>Screening continues at a steady pace. We have been largely at goal the past month. The final batch of sample (Release 9) has been released.</p> <p>We have released 18,710 cases to the endgame protocol. 1,412 cases (7.5%) of cases have completed a screener. 152 cases (10.8%) completed via the web, and 1,260 (89.2%) of cases completed in-person. Flagging of endgame cases has continues.</p>		

Special Issues

Cost as of Jan 21, 2025	Total Cost to Date (direct + indirect):	30,120,593.69
	Est Cost at Completion (E\$AC):	34,960,107.45
	Total Budget:	28,919,242.00
	Variance (Total Budget minus- E\$AC):	-6,040,865.45
Reason for Variance:		Projections have been entered through June 2025 (projection of when we would meet the baseline production goal).

Projections as of Jan 21, 2025	Dollars Projected for Month:	1,092,846.99
	Actual Dollars Used:	681,202.67
	Variance (Projected minus Actual):	411,644.32
	Reason for Variance:	Variance largely due to projections for hours not worked, hosting, and respondent payments being less than anticipated.

Measures		Units at Complete	RR	HPI
	Current Goal:	7,017/3,645 HHs	73%	3.0
	Goal at Completion:			
	Current Actual:	6,845/3,894	43.5%	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	<b>Project Lead:</b> Gary Hein <b>Budget Analyst:</b> Cindy Tsao <b>Production Manager:</b> Ruth B Philippou <b>Senior Project Advisor:</b> Evanthia Leissou <b>Production Manager 1:</b> <b>Production Manager 2:</b> 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> <b>Pre Production Start:</b> 09/01/2023   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> 10/05/2023 </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> 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		
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Report Period	Dec, 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 Jan 17, 2025	<b>Total Cost to Date (direct + indirect):</b>			266,659.75
	<b>Est Cost at Completion (E\$AC):</b>			262,307.75
	<b>Total Budget:</b>			505,359.00
	<b>Variance (Total Budget minus- E\$AC):</b>			243,051.25
	<b>Reason for Variance:</b>			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 Jan 17, 2025	<b>Dollars Projected for Month:</b>			-136.00
	<b>Actual Dollars Used:</b>			-200.10
	<b>Variance (Projected minus Actual):</b>			64.10
	<b>Reason for Variance:</b>			An extra check was voided.
Measures		Units at Complete	RR	HPI
	<b>Current Goal:</b>	2063	54%	N/A
	<b>Goal at Completion:</b>	2063	54%	N/A
	<b>Current Actual:</b>	671	17%	N/A
	<b>Estimate at Complete:</b>	671	17%	N/A
	<b>Variance:</b>	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	<b>Project Lead:</b> Gary Hein <b>Budget Analyst:</b> Cindy Tsao <b>Production Manager:</b> William Keating <b>Senior Project Advisor:</b> Evanthia Leissou <b>Production Manager 1:</b> <b>Production Manager 2:</b> 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> <b>Pre Production Start:</b> 04/01/2023  <b>Pretest End:</b>  <b>Staffing Complete:</b>  <b>SS Train Start:</b> 07/11/2023  <b>DC Start:</b> 06/20/2023 </div> <div> <b>Pretest Start:</b>  <b>Recruitment Start:</b>  <b>GIT Start:</b>  <b>SS Train End:</b> 07/11/2023  <b>DC End:</b> 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	Dec, 2024 (LHMS 2023 Spring)		Implementing
Risk Level	On Track		
Monthly Updates	December 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 Jan 17, 2025	Total Cost to Date (direct + indirect):		233,371.80	
	Est Cost at Completion (E\$AC):		246,326.17	
	Total Budget:		457,922.00	
	Variance (Total Budget minus- E\$AC):		211,595.83	
	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 Jan 17, 2025	Dollars Projected for Month:		209.29	
	Actual Dollars Used:		303.97	
	Variance (Projected minus Actual):		-94.68	
	Reason for Variance:	Coding was a few hours higher than projected.		
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			

<b>Project Name</b>	<b>(MI CReSS (Year 3 &amp; 4 &amp; 5)) Michigan COVID-19 Recovery Surveillance Cohort Study (On Track)</b>		
<b>Project Mode</b>	Primary: Web	Secondary: Telephone	Total of Modes: 2
<b>Project Type</b>	Sponsored Projects		
<b>Budget</b>	<b>Direct Budget:</b> 200,023.00	<b>Indirect Budget:</b> 52,005.00	<b>Total Budget:</b> 252,028.00
<b>Principal Investigator/Clients</b>	Nancy Fleischer (U-M School of Public Health (SPH))		
<b>Funding Agency</b>	MDHHS - Releases 1 - 8		
<b>IRB</b>	<b>HUM#:</b> HUM00234617	<b>Period of Approval:</b> 6/15/2023-6/14/2028	
<b>Project Team</b>	<b>Project Lead:</b> Timothy Prand		
	<b>Budget Analyst:</b> William Lokers		
	<b>Production Manager:</b> Lisa J Carn		
	<b>Senior Project Advisor:</b> Nicole G Kirgis		
	<b>Production Manager 1:</b> Narine Verdiyan		
	<b>Production Manager 2:</b>		
<b>Proposal #</b>	no data		
<b>Description</b>	<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>		
<b>SRO Project Period</b>	08/2021 - 09/2023		
<b>Data Col Period</b>	01/2022 - 07/2023		
<b>Security Plan</b>	NA		
<b>Milestones</b>	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b> 07/28/2023   <b>DC Start:</b> 09/14/2023 </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b> 06/01/2023   <b>GIT Start:</b>   <b>SS Train End:</b> 07/29/2023   <b>DC End:</b> 02/18/2025 </div> </div>		
<b>Other Project Team Members</b>	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		
<b>Other Project Name</b>			
<b>Sample Mgmt System</b>	Web SMS		
<b>Data Col Tool</b>	Blaise 5		
<b>Hardware</b>	Laptop; Desktop		
<b>DE Software</b>	NA		
<b>QC Recording Tool</b>	NA		
<b>Incentive</b>	Yes, R		
<b>Administration</b>	SRO Group		
<b>Payment Type</b>	Other (HSIP VISA Gift Card)		

Payment Method	NA			
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Report Period	Dec, 2024 (MI CReSS (Year 3 & 4 & 5))		Implementing	
Risk Level	On Track			
Monthly Updates	<div>Cohort 2</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>Project is expected to close field as of Feb 4, 2025 even though we are scheduled to go to Feb 18th. There are currently no Cognitive IWs which could change.</div> <div>Response rate within acceptable range overall</div> <div>Release 9 - 73.8%</div> <div>Release 10 - 74.7%</div> <div>Release 11 - 79.3%</div> <div>Release 12 - 80%</div> <div>Release 13 - 76.4%</div> <div>Release 14 - 78.8%</div> <div>Release 15 - 80.8%</div> <div>Release 16 - 82.1%</div> <div>For REL 9 to 16 - 233 completes completed after the TOA increase from \$25 to \$50. Impact to the cost is \$5825</div>			
Special Issues	None!			
Cost as of Jan 17, 2025	Total Cost to Date (direct + indirect):		95,043.63	
	Est Cost at Completion (E\$AC):		136,108.40	
	Total Budget:		252,028.00	
	Variance (Total Budget minus- E\$AC):		115,919.60	
	Reason for Variance:		Fewer hours needed on project. Will carry forward to MI CReSS Community surveys at the end of Y5.	
Projections as of Jan 17, 2025	Dollars Projected for Month:		18,655.27	
	Actual Dollars Used:		27,290.41	
	Variance (Projected minus Actual):		-8,635.14	
	Reason for Variance:		We had come under for the month of November and some of those hours and respondent payments hit in December	
Measures		Units at Complete	RR	HPI
	Current Goal:	3650	77.8%	3
	Goal at Completion:	3650	80%	6
	Current Actual:	3649	77.8%	6.0
	Estimate at Complete:	3649	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	(MI CReSS CS) Michigan COVID-19 Recovery Surveillance Study Community Survey (On Track)		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 974,802.00	Indirect Budget: 253,450.00	Total Budget: 1,228,252.00
Principal Investigator/Clients	Nancy Fleischer (U-M School of Public Health (SPH))		
Funding Agency	MDHHS		
IRB	HUM#: HUM00264140	Period of Approval: 2/3/2025-2/2/2030	
Project Team	<b>Project Lead:</b> Timothy Prand <b>Budget Analyst:</b> Ivanna Iavorska-Em <b>Production Manager:</b> Lisa J Carn <b>Senior Project Advisor:</b> Nicole G Kirgis <b>Production Manager 1:</b> <b>Production Manager 2:</b>		
Proposal #	no data		
Description	<p>The Michigan COVID-19 Recovery Surveillance Study (MI CReSS) is a population-based cohort study that is a collaborative project between the University of Michigan School of Public Health and the Michigan Department of Health and Human Services (MDHHS). The study was launched in June 2020 with the goal of understanding the experience and social impact of a COVID-19 diagnosis on adults living in Michigan and examined a wide range of topics including symptom severity and duration, recovery time, Long COVID, mental health impacts, stressful events, financial impacts, and more. The study includes a baseline and two follow-up data collections.</p> <p>The objective of the MI CReSS Community Survey is to understand the experiences of adults who lived in Michigan during the COVID-19 pandemic from priority populations that were underrepresented in the prior MI CReSS Cohort study. We identified four priority populations to focus on: people of racial and ethnic minoritized identities, people living in rural areas, people currently or recently on Medicaid, and people with disabilities. The study will examine participants' experiences related to COVID-19 disease history, Long COVID, mental health, workplace experiences, ability to meet basic needs, and more.</p> <p>The University of Michigan (U-M) School of Public Health will lead this project and will work with the Survey Research Operations (SRO) team at the U-M Survey Research Center (SRC) within the U-M Institute of Social Research (ISR) to collect the project data. Project activities will occur in partnership with the Michigan Department of Health and Human Services (MDHHS).</p>		
SRO Project Period	11/2024 - 05/2026		
Data Col Period	03/2025 - 02/2026		
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b> 12/17/2024  <b>Pretest End:</b>  <b>Staffing Complete:</b> 12/18/2024  <b>SS Train Start:</b> 03/12/2025  <b>DC Start:</b> 03/04/2025 </div> <div> <b>Pretest Start:</b>  <b>Recruitment Start:</b> 11/01/2024  <b>GIT Start:</b>  <b>SS Train End:</b> 03/13/2025  <b>DC End:</b> 02/15/2026 </div> </div>		
Other Project Team Members	Hueichum Peng - Technical Lead Peter Sparks - Blaise Programmer Asia Paige - Data Manager Megan Hromco - SSA Steve Senoras - SSI		
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	Blaise 5		
Hardware	Laptop; Desktop		
DE Software	N/A		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Cash, prepaid (\$2); Other (HSIP VISA Gift Card)		
Payment Method	NA		

Report Period	Dec, 2024 (MI CReSS CS)		Initiation	
Risk Level	On Track			
Monthly Updates	<p>IRB was submitted on Nov 13th but still have not received approval. On 1/15, an update was provided - Changes required by Core Staff. Hoping for those changes to be submitted the week of 1/20.</p> <p>Once IRB approved, there are amendments needing to be submitted. MDHHS IRB will also need to approve.</p> <p>Original start in field was slated for Feb 3, 2025 but is pushed back until March 4, 2025. I expect this date to hold. IWER training has changed as well and is currently set for March 12-13</p> <p>Still waiting to receive final sample for the 1st Community, Rural.</p>			
Special Issues	IRB approval timing. It took 2 months to receive feedback.			
Cost as of Jan 17, 2025	Total Cost to Date (direct + indirect):		23,721.63	
	Est Cost at Completion (E\$AC):		1,227,136.71	
	Total Budget:		1,228,252.00	
	Variance (Total Budget minus- E\$AC):		1,115.29	
	Reason for Variance:		Expected to be close to budget but delays and USPS cost changes may impact future variances.	
Projections as of Jan 17, 2025	Dollars Projected for Month:		65,353.23	
	Actual Dollars Used:		8,856.78	
	Variance (Projected minus Actual):		56,496.45	
	Reason for Variance:		Delay is receiving specifications. We pushed forward the hours and are pushing to start by March 4th.	
Measures		Units at Complete	RR	HPI
	Current Goal:	4000	50%	5.2
	Goal at Completion:			
	Current Actual:	0	0	0
	Estimate at Complete:			
	Variance:			
Other Measures	Each Community will have there own targets Rural Racial Disability Medicaid			

<b>Project Name</b>	<b>(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027 (On Track)</b>												
<b>Project Mode</b>	Primary: Class SAQ      Total of Modes: 1												
<b>Project Type</b>	Sponsored Projects												
<b>Budget</b>	<b>Direct Budget:</b> 6,267,988.00	<b>Indirect Budget:</b> 3,510,072.00	<b>Total Budget:</b> 9,778,060.00										
<b>Principal Investigator/Clients</b>	Richard Miech (SRC)												
<b>Funding Agency</b>	National Institute on Drug Abuse, one of the National Institutes of Health.												
<b>IRB</b>	<b>HUM#:</b> 00217920	<b>Period of Approval:</b> from 7/20/22 No CR											
<b>Project Team</b>	<b>Project Lead:</b> Rebecca Gatward <b>Budget Analyst:</b> Dean E Stevens <b>Production Manager:</b> Margaret Lavanger <b>Senior Project Advisor:</b> Shonda R Kruger-Ndiaye <b>Production Manager 1:</b> <b>Production Manager 2:</b>												
<b>Proposal #</b>	no data												
<b>Description</b>	<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.. <a href="http://www.monitoringthefuture.org/">http://www.monitoringthefuture.org/</a></p>												
<b>SRO Project Period</b>	04/2022 - 03/2027												
<b>Data Col Period</b>	04/2022 - 03/2027												
<b>Security Plan</b>	Yes												
<b>Milestones</b>	<table border="0"> <tr> <td><b>Pre Production Start:</b></td><td><b>Pretest Start:</b></td></tr> <tr> <td><b>Pretest End:</b></td><td><b>Recruitment Start:</b></td></tr> <tr> <td><b>Staffing Complete:</b></td><td><b>GIT Start:</b></td></tr> <tr> <td><b>SS Train Start:</b></td><td><b>SS Train End:</b></td></tr> <tr> <td><b>DC Start:</b></td><td><b>DC End:</b></td></tr> </table>			<b>Pre Production Start:</b>	<b>Pretest Start:</b>	<b>Pretest End:</b>	<b>Recruitment Start:</b>	<b>Staffing Complete:</b>	<b>GIT Start:</b>	<b>SS Train Start:</b>	<b>SS Train End:</b>	<b>DC Start:</b>	<b>DC End:</b>
<b>Pre Production Start:</b>	<b>Pretest Start:</b>												
<b>Pretest End:</b>	<b>Recruitment Start:</b>												
<b>Staffing Complete:</b>	<b>GIT Start:</b>												
<b>SS Train Start:</b>	<b>SS Train End:</b>												
<b>DC Start:</b>	<b>DC End:</b>												
<b>Other Project Team Members</b>	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												
<b>Other Project Name</b>													
<b>Sample Mgmt System</b>	SurveyTrak; Web SMS												
<b>Data Col Tool</b>	Other (Qualtrics)												
<b>Hardware</b>	Laptop; Tablet; [UM cell] Phone												
<b>DE Software</b>	Other (Qualtrics)												
<b>QC Recording Tool</b>	N/A												
<b>Incentive</b>	Yes, Other (Honorarium paid to school by MTF Research staff)												
<b>Administration</b>	ISR Group												
<b>Payment Type</b>	NA												
<b>Payment Method</b>	Check through other system												

<b>Report Period</b>	Dec, 2024 (MTF Base Year 2022_27)	Implementing
<b>Risk Level</b>	On Track	
<b>Monthly Updates</b>	December 2024 - TL preproduction meeting/training took place on 12/12 - Preproduction tasks - tech. system updates and training preparation.	

#### Special Issues

<b>Cost as of Jan 17, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	3,126,008.67
	<b>Est Cost at Completion (E\$AC):</b>	7,021,954.01
	<b>Total Budget:</b>	9,778,060.00
	<b>Variance (Total Budget minus- E\$AC):</b>	2,756,105.99

**Reason for Variance:**

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

<b>Projections as of Jan 17, 2025</b>	<b>Dollars Projected for Month:</b>	92,571.76
	<b>Actual Dollars Used:</b>	84,392.66
	<b>Variance (Projected minus Actual):</b>	8,179.10

**Reason for Variance:**

~\$1500 of PCARD travel costs for trips in October were reconciled in Dec. Majority of the variance is in salary costs. A few team members hours were below projected and IWER III hours were lower than projected.

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

#### 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	<b>Project Lead:</b> Donnalee Ann Grey-Farquharson <b>Budget Analyst:</b> Dean E Stevens <b>Production Manager:</b> <b>Senior Project Advisor:</b> Rebecca Gatward <b>Production Manager 1:</b> Hongyu Johnson <b>Production Manager 2:</b>												
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 for two 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> <p>Consent process</p> <ul style="list-style-type: none"> <li>- Parents were mailed a letter with a link to a consent document in Qualtrics.</li> <li>- After receiving parental consent, students were contacted so,</li> <li>- Students on individual schedule, programmed in WebSMS</li> </ul> <p>Data Collection</p> <ul style="list-style-type: none"> <li>- Invitation email</li> <li>- followed by two reminders, 2 weeks apart if needed. Each student was on his/her own schedule based on when parental permission was received.</li> </ul> <p>Plan for Future</p> <ul style="list-style-type: none"> <li>- Two more years of data collection</li> </ul> <table> <tr> <td>Year Recruited</td> <td>Follow-Up</td> </tr> <tr> <td>2023</td> <td>2024, 2025</td> </tr> <tr> <td>2024</td> <td>2025, 2026</td> </tr> </table>			Year Recruited	Follow-Up	2023	2024, 2025	2024	2025, 2026				
Year Recruited	Follow-Up												
2023	2024, 2025												
2024	2025, 2026												
SRO Project Period	07/2023 - 12/2025												
Data Col Period	04/2024 - 08/2025												
Security Plan	NA												
Milestones	<table> <tr> <td><b>Pre Production Start:</b></td> <td><b>Pretest Start:</b></td> </tr> <tr> <td><b>Pretest End:</b></td> <td><b>Recruitment Start:</b></td> </tr> <tr> <td><b>Staffing Complete:</b></td> <td><b>GIT Start:</b></td> </tr> <tr> <td><b>SS Train Start:</b></td> <td><b>SS Train End:</b></td> </tr> <tr> <td><b>DC Start:</b></td> <td><b>DC End:</b></td> </tr> </table>			<b>Pre Production Start:</b>	<b>Pretest Start:</b>	<b>Pretest End:</b>	<b>Recruitment Start:</b>	<b>Staffing Complete:</b>	<b>GIT Start:</b>	<b>SS Train Start:</b>	<b>SS Train End:</b>	<b>DC Start:</b>	<b>DC End:</b>
<b>Pre Production Start:</b>	<b>Pretest Start:</b>												
<b>Pretest End:</b>	<b>Recruitment Start:</b>												
<b>Staffing Complete:</b>	<b>GIT Start:</b>												
<b>SS Train Start:</b>	<b>SS Train End:</b>												
<b>DC Start:</b>	<b>DC End:</b>												
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)			
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Report Period	Dec, 2024 (MTF Early Panel Pilot)		Implementing	
Risk Level	On Track			
Monthly Updates	The SRO management team started the conversations with the research team on the upcoming plan for this project.			
Special Issues				
Cost as of Dec 31, 2024	Total Cost to Date (direct + indirect):		138,857.32	
	Est Cost at Completion (E\$AC):		265,402.44	
	Total Budget:		288,529.00	
	Variance (Total Budget minus- E\$AC):		23,126.56	
	Reason for Variance:	The SRO management team continues to make necessary adjustments on staff projections to reduce underrun as well as supporting other projects as needed.		
Projections as of Dec 31, 2024	Dollars Projected for Month:		11,008.16	
	Actual Dollars Used:		7,880.36	
	Variance (Projected minus Actual):		3,127.80	
	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 Innovation Panel) Monitoring the Future: Young Adult Innovation Panel 2024 (On Track)		
Project Mode	Primary: Web		
Project Type	Sponsored Projects		
Budget	Direct Budget: 34,910.00	Indirect Budget: 12,567.00	Total Budget: 47,477.00
Principal	Megan Patrick (ISR, SRC)		
Investigator/Clients			
Funding Agency			
IRB	HUM#: 00217920	Period of Approval:	
Project Team	<b>Project Lead:</b> Donnalee Ann Grey-Farquharson <b>Budget Analyst:</b> Dean E Stevens <b>Production Manager:</b> <b>Senior Project Advisor:</b> Rebecca Gatward <b>Production Manager 1:</b> Hongyu Johnson <b>Production Manager 2:</b>		
Proposal #	no data		
Description	<p>The proposed project will address the specific innovation aims outlined in the existing Monitoring the Future (MTF) NIDA Grant (DA016575) by collecting data from a single web survey of 1,880 adults aged approximately 20-21 years. The participants are from those who participated in the 12th grade MTF surveys in 2022/2023 and were not selected for the original MTF Panel. The Innovation Panel study will examine various aspects of post-pandemic life for young adults in a sample of those who experienced the COVID-19 pandemic during their high school years. These include mental health, stress, occupational status, and gambling activities as well as substance use behaviors. Results will advance our understanding of the immediate and long-term effects of the uncertainty caused by the pandemic on the lives of young adults and will also offer an opportunity to examine the resilience and vulnerability of young adults in early adulthood. Furthermore, the Innovation Panel will conduct responsive survey design (RSD) experiments aimed to increase respondent engagement and retainment. For easier survey engagement on mobile devices, we will evaluate scales using optimized survey flow and branching. We will examine the feasibility of using electronic incentives, and test three structures of incentives (a. pre-incentive \$25 check - the current MTF method; b. \$25 pre-incentive electronic gift card; and c. \$5 pre-incentive and \$20 post-incentive electronic gift cards) on survey response rates and data quality. Lastly, we will compare response rates for an experiment with and without survey pre-notification groups. This will inform innovative ways to enhance respondent engagement and retention of panel members as well as address emerging topics of particular research interest.</p>		
SRO Project Period	07/2024 - 06/2025		
Data Col Period	10/2024 - 01/2025		
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
Other Project Team Members	Rebecca Gatward (SPA), Donnalee Grey-Farquharson (Lead), Hueichun Peng, Shaowei Sun, Hongyu Johnson, Ed Green, Max Malhotra, Lloyd Hemingway		
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	NA		
<div></div>			
Report Period	Dec, 2024 (MTF Innovation Panel)		Implementing

<b>Risk Level</b>	On Track			
<b>Monthly Updates</b>	We are in the middle of the production. The process of automatic Tango card payment is working well. We continue to monitor production and SMS to ensure all systems are working correctly.			
<b>Special Issues</b>				
<b>Cost as of Dec 31, 2024</b>	<b>Total Cost to Date (direct + indirect):</b>	4,295.26		
	<b>Est Cost at Completion (E\$AC):</b>	39,641.30		
	<b>Total Budget:</b>	47,477.00		
	<b>Variance (Total Budget minus- E\$AC):</b>	7,835.70		
	<b>Reason for Variance:</b>	The project has a favorable underrun due to using less projected hours.		
<b>Projections as of Dec 31, 2024</b>	<b>Dollars Projected for Month:</b>	8,658.71		
	<b>Actual Dollars Used:</b>	4,295.26		
	<b>Variance (Projected minus Actual):</b>	4,363.45		
	<b>Reason for Variance:</b>	The project has a favorable underrun due to using less projected hours.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
<b>Other Measures</b>				

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	<b>Project Lead:</b> Donnalee Ann Grey-Farquharson <b>Budget Analyst:</b> Dean E Stevens <b>Production Manager:</b> Lloyd Fate Hemingway <b>Senior Project Advisor:</b> Rebecca Gatward <b>Production Manager 1:</b> <b>Production Manager 2:</b> 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. We also use WebSMS, RLM, LabSMS and Blaise for the project. 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>During 2024 data collection wave, we have 10 survey forms that was reduced from 12 from the previous year.</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. We are planning to use Respondent Website to delivery newsletter electronically with the functionality of collecting respondent's contact information.</p>		
SRO Project Period	01/2022 - 03/2027		
Data Col Period	04/2022 - 10/2026		
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </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)		
<div></div>			

<b>Report Period</b>	Dec, 2024 (MTF Panel 2022-27)			Implementing
<b>Risk Level</b>	On Track			
<b>Monthly Updates</b>	The SRO management team and the TSG staff started the preparation work for MTF Panel 2025 production which will start in mid-April 2025. We are working with the research team staff on setting up systems and preparing surveys.			
<b>Special Issues</b>				
<b>Cost as of Dec 31, 2024</b>	<b>Total Cost to Date (direct + indirect):</b>			2,026,489.89
	<b>Est Cost at Completion (E\$AC):</b>			4,009,215.32
	<b>Total Budget:</b>			3,895,217.00
	<b>Variance (Total Budget minus- E\$AC):</b>			-113,998.32
	<b>Reason for Variance:</b>			The SRO management team continues to make necessary adjustments to reduce overrun.
<b>Projections as of Dec 31, 2024</b>	<b>Dollars Projected for Month:</b>			32,709.15
	<b>Actual Dollars Used:</b>			27,629.83
	<b>Variance (Projected minus Actual):</b>			5,079.32
	<b>Reason for Variance:</b>			Hours charged were lower than projected.
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
<b>Other Measures</b>				

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: Piotr Dworak		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Dedra Campbell		
	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, Raphael Nishimura, Ji Qi, AB Fuqua-Smith, Liliana Grueber, Jackson Collier, Margaret Hudson (until Jan 2025)		
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		
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<b>Report Period</b>	Dec, 2024 (NDWS)			Implementing
<b>Risk Level</b>	Some Concerns			
<b>Monthly Updates</b>	<p>January activities:</p> <ul style="list-style-type: none"> <li>* The pace of data collection remains slow, in particular with Home Care sample type while Assisted Living and Nursing Homes facilities participate at a slightly higher rate. The data collection teams are focused on incorporating the strategies for making contact with organizational leaders and addressing concerns that came out of the meeting with the PI team subject matter experts. We are also presenting data collection progress to the NDWS DMC seeking further advice from NIA and affiliated researchers.</li> <li>* An Wave 2 IRB amendment is forthcoming. We ran into delays with survey translation and our U-M SRO Span Tran team is looking to provide support if possible. Wave 2 is due to start in March 2025.</li> <li>* In June and July 2025, we will also start AL, NH staff re-interviews and a focused Community Clinicians (CC) non-response follow up including a shorter survey and increased incentive.</li> <li>* Wave 2 sample frame development has been completed and sample is being delivered.</li> <li>* Wave 2 cognitive interviewing has concluded in November and final Wave 2 surveys have been finalized by December 16th, however, further changes have been made by January 8. U-M team has delivered programming spec for NH and AL and is finalizing HC and CC.</li> </ul>			
<b>Special Issues</b>				
<b>Cost as of Jan 17, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	923,766.81		
	<b>Est Cost at Completion (E\$AC):</b>	6,240,922.93		
	<b>Total Budget:</b>	6,750,973.00		
	<b>Variance (Total Budget minus- E\$AC):</b>	510,050.07		
	<b>Reason for Variance:</b>	We updated allocations through year 2 of the study but more updates are needed to negate the underrun.		
<b>Projections as of Jan 17, 2025</b>	<b>Dollars Projected for Month:</b>	124,653.66		
	<b>Actual Dollars Used:</b>	67,664.84		
	<b>Variance (Projected minus Actual):</b>	56,988.82		
	<b>Reason for Variance:</b>	Our involvement in the work varies and are currently less involved than projected.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
<b>Other Measures</b>				



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)		
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Report Period	Dec, 2024 (PR-PSID)		Implementing
Risk Level	Some Concerns		
Monthly Updates	PIs and SRO met with ETI (PR data collection firm) to kick off preproduction for main data collection. Regular meetings are scheduled to begin in January.		

A small number of sample corrections were required -- DMSS redrew the sample and removed cases that should have been deleted from the address frame in ST.

SRO received last minute request to provide budget estimates for Americorps funding on 12/19. As of 1/21, no update on whether we will receive the funding.

Blaise Programming kicked off on 12/4. We are still awaiting PI review of the Core 25 mods. We will proceed and program all Core25 mods, and will make revisions as needed once the PIs finish their review. ST programming kicked off in Dec.

SRO has made significant progress on Pretest Data Out -- all sections of the instrument have been transformed and exported. Awaiting PI guidance on next steps to further refine and finalize the tables.

<b>Special Issues</b>	Same as last month -- overrun and uncertainty around PCP work scope which is new to SRO.			
<b>Cost as of Jan 17, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	661,671.37		
	<b>Est Cost at Completion (E\$AC):</b>	1,496,642.04		
	<b>Total Budget:</b>	1,292,585.00		
	<b>Variance (Total Budget minus- E\$AC):</b>	-204,057.04		
	<b>Reason for Variance:</b>	Very minimal changes to estimated cost at completion - variance is very close to Nov.		
<b>Projections as of Jan 17, 2025</b>	<b>Dollars Projected for Month:</b>	26,295.03		
	<b>Actual Dollars Used:</b>	19,693.49		
	<b>Variance (Projected minus Actual):</b>	6,601.54		
	<b>Reason for Variance:</b>	Tech actuals were less than projected -- tech work began later in the month. Projections were moved forward.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
<b>Other Measures</b>				

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 End:   Staffing Complete:   SS Train Start:   DC Start: </div> <div> Pretest Start:   Recruitment Start:   GIT Start:   SS Train End:   DC End: </div> </div>		
Other Project Team Members	Shonda Kruger-Ndiaye -- PSID Suite Lead Rachel Orlowski -- PSID Survey Director Daric Throne -- MSMS Spec Lead James Rodgers -- MSMS Lead Karl Dinkelmann -- Blaise Lead Jeffrey Smith -- TSG Lead Jude Perillo -- Blaise Programmer Darnell Christian -- MSMS Set Up Programmer Edward Green -- Data Manager Rose Zdybel -- Data Management Support Laura Yoder -- Archiving Ivanna Iavorska-Em -- Financial Analyst		
Other Project Name			
Sample Mgmt System	MSMS		
Data Col Tool	Blaise 5		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	ISR Group (PSID)		
Payment Type	Check, post (\$10); Other (electronic, post--JP Morgan)		
Payment Method	NA		
=====			
Report Period	Dec, 2024 (PSID 2025 OCU)		Implementing
Risk Level	On Track		
Monthly Updates	Data Collection ended on 12/8 – portal was closed on 12/9 -- Ended with 2,862 total web completes (compared to		

1,561 last wave)  
Overall RR was higher than last wave (~45% compared to 35% last wave)  
~5,694 total responses this wave (web + mail) compared to 4,367 last wave

ORIO Complaint Submitted on 12/8 -- Splitoff R that had never been formally invited to the study became upset after receiving the final email reminder, because she had not provided us with her contact information. SRO and PSID removed all of her NAPE data from MSMS and the PSID systems. SRO redelivered the final data after the NAPE data was removed from the MSMS tables.  
SRO responded to the Splitoff R on 12/20 to let her know that her information had been deleted. As of 1/21, IRB has not yet acknowledged the ORIO.

#### Special Issues

<b>Cost as of Jan 17, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	74,396.73
	<b>Est Cost at Completion (E\$AC):</b>	78,369.88
	<b>Total Budget:</b>	81,686.00
	<b>Variance (Total Budget minus- E\$AC):</b>	3,316.12
	<b>Reason for Variance:</b>	Minimal on-going work. Actuals have slightly less than projections.
<b>Projections as of Jan 17, 2025</b>	<b>Dollars Projected for Month:</b>	4,118.29
	<b>Actual Dollars Used:</b>	3,163.27
	<b>Variance (Projected minus Actual):</b>	955.02
	<b>Reason for Variance:</b>	Data management and management actuals slightly less than projected

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

#### 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	<b>Project Lead:</b> Camila Kendall <b>Budget Analyst:</b> Ivanna Iavorska-Em <b>Production Manager:</b> Sarah Crane <b>Senior Project Advisor:</b> Stephanie A Chardoul <b>Production Manager 1:</b> Barbara Aghababian-Homburg <b>Production Manager 2:</b> 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> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </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	Dec, 2024 (PSID CDS23 Phase 2)		Implementing
Risk Level	On Track		
Monthly Updates	<p>Final planned batch of sample (rel 8) released on 12/11. 2 additional cases were (very late locating leads) were released as Rel 9 on 12/19.</p> <p>Mailing with \$5 sent to all cases that were not local to a phase 2 IWER, and not within a FTF cluster that would be visited on 12/11 (n=242).</p> <p>29 Travel trips took place in December. FTF travel concluded on 12/21.</p>		

As of 1/21, 1252 samples have been logged (18.9% RR). Saliva Problem follow-up will begin in December. Consent follow up will begin in January.

Current RR as of 1/21 by Rel: Overall budgeted RR goal is 34%

Rel 1 - 33.7%  
 Rel 2 - 29.4%  
 Rel 3 - 28.1%  
 Rel 4 - 32.6%  
 Rel 5 - 12.8%  
 Rel 6 - 8.6%  
 Rel 7 - 9.5%  
 Rel 8 - 21.4%

Trained field interviewers on Saliva Problem Follow Up protocols on 12/11.

Worked with Ashwin to develop a "Second Return" logging application for saliva problem follow up cases.

Beginning to run low on saliva kit inventory. Made arrangements with Core PIs to purchase saliva kits directly from Core, instead of from the vendor.

ORIO submitted on 12/20 (for submitted materials that were used before IRB approval) acknowledged by IRB on 1/14/2025.

#### Special Issues

<b>Cost as of Jan 17, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	995,042.74
	<b>Est Cost at Completion (E\$AC):</b>	1,534,626.84
	<b>Total Budget:</b>	2,524,678.00
	<b>Variance (Total Budget minus- E\$AC):</b>	990,051.16
	<b>Reason for Variance:</b>	Reduced hours for IWER II & III to more accurately reflect work scope. Also reduced non-sal projections for freight and postage based on lower actuals.

<b>Projections as of Jan 17, 2025</b>	<b>Dollars Projected for Month:</b>	262,108.55
	<b>Actual Dollars Used:</b>	228,768.53
	<b>Variance (Projected minus Actual):</b>	33,340.02
	<b>Reason for Variance:</b>	Actuals across management, tech, and Survey tech categories were less than projected. Freight and Postage actuals significantly less than projected.

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

#### 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)			
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Report Period	Dec, 2024 (PSID23)		Closing	
Risk Level	On Track			
Monthly Updates	Summary of December 2024 Activities			
	Saliva Collection Preparing to close the project at SRO. Awaiting confirmation from PSID on when to deliver paper consents.			
	Closed access to SRO shortcodes. Awaiting CDS23 Phase II's purchase of leftover PSID23 Core saliva kits (and transfer of funds) to produce the final cost report.			
Special Issues	Saliva data collection (including FTF visits) started later than originally planned. Saliva RR short of budgeted target (44%).			
Cost as of Jan 08, 2025	Total Cost to Date (direct + indirect):		5,684,068.75	
	Est Cost at Completion (E\$AC):		5,684,068.75	
	Total Budget:		6,235,802.00	
	Variance (Total Budget minus- E\$AC):		551,733.25	
	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 Jan 08, 2025	Dollars Projected for Month:		0.00	
	Actual Dollars Used:		170.68	
	Variance (Projected minus Actual):		-170.68	
	Reason for Variance:	Fringe benefits hit late. 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)		
	Esther Friedman (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 - 12/2025		
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 & Holly Ackerman; Blaise Programmer - Jude Perillo; MSMS Programmers - Pam Swanson, Darnell Christian, & Holly Ackerman; Tech Support - David Bolt & Kyle Goodman; Tech Design/Testing - Sarah Broumand & Jaime Koopman; Production Support: Lorraine Bird; Project Support: Saujanya Acharya, Janet McBride, & Xiomara Lorenzo-Guerra; Reporting, Mapping, & Sample Assignment: Ji Qi, Minako Edgar, Saujanya Acharya, & 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)		

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Report Period	Dec, 2024 (PSID25)	Implementing
Risk Level	On Track	
Monthly Updates	Summary of December 2025 activities:	
	<p>Tech:</p> <p>MSMS - New tool was released for email and text template generation, allowing the teams to create "blocks" of frequently occurring paragraphs or sentences. Tool locates tags for these blocks and inserts them into the final project files that are uploaded and used by MSMS, making template creation easier from spec writers to programmers. User management features added in November were made available in limited ways, and expanded by the end of the month to include not only the distributed resource on the line (typically interviewers) but also TLs. This rollout delayed the testing of some rules and email functionality, but was added to the team specification. Some concerns around how user information was being updated, especially for TLs, PCs, and Locators, were identified - it will be possible to include these details in user records, but they will need to be maintained via the team spec. Some issues identified after the sample release schedule was provided, suggesting that some Training 1 interviewers could have high (~400 lines per lwer) sample loads. Tricia tested, and found that in her testing environment, an lwer with 1000 lines and about 400 attributes caused the Sample Line grid to take about 1 minute and 20 seconds to load every time the user returned to that tab. This would be problematic for production and lwer HPI, so the team began to explore alternative models. Int 1 testing continued, and quite a few email/text template tasks were deemed to no longer be necessary. Scheduled those tasks for removal and began scheduling for an Int2 project in January. Pam and Darnell collaborating and dividing up DCA work, with Darnell handling templates/messaging subrules/messaging tabs in the DCA, and Pam handling the other MSMS related setup programmer work.</p> <p>Blaise - Issues with DIM identified in November persisted with unofficial version being deployed to temporarily work around the "Blaise upload error" testers were receiving. CBS indicated that they were aware of the bug and were planning to release an official version to address the issues we identified. Without an update from CBS, agreed that we needed to start making firmer plans in January in case an update was not released before PSID Prod release. An issue with web links not directing to the correct place was updated in project settings. CTT testing continued. Discussion around updating the Saliva Eligible fields to have no exclusions, until criteria is established by PIs. Testers began to notice a "red box" error during testing Web, cause note certain. We also became aware of some issues around 2x mode switches (Web to CATI to Web, or CATI to Web to CATI) where data was not being preserved. This is being caused by the project keeping session records, and an option to explore would be to delete session records after Web or CATI closes. This could lead to longer boot ups of the instrument in both settings, and would need to be tested. It was agreed by both study staff and SRO staff that this was worth exploring in the new year. Started testing a limited data model release for daily payment processing of RPay data by PSID study staff.</p> <p>68-ID - Continued working through Milestone 4 goals, allowing Locators to see, add, and update locating leads. Connected to PSID Int1 project for some further testing. Started working through MS5 goals by end of month, including new Locator work plans functionality.</p> <p>Reports - Access to the timing reports for 2023 were resolved. Added some resources to help with report generation. Continued to work on Call Audit, Recon, and testing reports. Request was made to the Report team to generate some data on the number of 2x mode switch cases project saw in 2023 in order to get a better handle on the size of problems we could anticipate in 2025 if the discovered mode switch bug persists.</p> <p>PI Decisions:</p> <p>Baseline incentives will be increased by \$5, meaning \$85 for Reinterviews and \$105 for Recontacts and Splitoffs.</p> <p>On 12/8, submitted an IRB Adverse Event regarding a compliant from a 2023 Splitoff R who was generated after 2023 data collection. They were first contacted as part of the 2024 Contact Update project. They were upset their husband provided their contact information and asked for it to be removed. SRO and PSID staff removed their contact information from 2023 and 2025 Core and 2024 Contact Update projects. This R is no longer part of the suite of studies.</p> <p>Recruitment, Hiring, &amp; Training:</p> <p>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 will include 11 lwers and 7 TLs. T2 dates are 4/14/25-4/25/25 and will include 29 lwers and 1 PC. T1 and T2 trainings will be ½ days, weekdays only. The February T1 training agenda has been finalized, as well as materials and content assignments. Both T1 and T2 trainings will include technical systems training, protocols, family listing, and the Core interview. Both trainings will include OSers only. The T3 training dates will likely be the first 2 weeks of June. We believe T3 will include only OSers so there will be no need for an in-person training. We are expecting approximately 47 lwers and 3 TLs. The first TL training is scheduled for 3/10/25 - 3/14/25.</p> <p>Sample Release / Mailing:</p> <p>The team is finalizing the advanced mailing protocol which includes several different types of advanced mailings for different sample types. The sample release schedule will be followed, so letters will be mailed by Release.</p>	
Special Issues		
Cost as of Jan 15, 2025	Total Cost to Date (direct + indirect):	1,183,509.15
	Est Cost at Completion (E\$AC):	7,737,204.13

<b>Total Budget:</b>		7,805,285.00		
<b>Variance (Total Budget minus- E\$AC):</b>		68,080.87		
<b>Reason for Variance:</b>		Removed costs associated with new hires and in-person training--now projecting an underrun. Projecting interviewers and survey specialists/directors at a higher rate than budgeted. Designing data collection and training differently than budgeted.		
<b>Projections as of Jan 15, 2025</b>	<b>Dollars Projected for Month:</b>	172,620.56		
<b>Actual Dollars Used:</b>		149,372.13		
<b>Variance (Projected minus Actual):</b>		23,248.43		
<b>Reason for Variance:</b>		The primary drivers of the variance are data managers, technical support staff, and SSIs working less than projected, as well as no costs for services of others hitting.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>	9,994	89%	4.73
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>	9,994	89%	4.73
	<b>Variance:</b>			
<b>Other Measures</b>	'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	<b>Project Lead:</b> Elizabeth Ohryn <b>Budget Analyst:</b> Dean E Stevens <b>Production Manager:</b> Lisa J Carn <b>Senior Project Advisor:</b> Shonda R Kruger-Ndiaye <b>Production Manager 1:</b> Narine Verdiyan <b>Production Manager 2:</b>		
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 - 01/2025		
Data Col Period	08/2024 - 12/2024		
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b> 05/01/2024  <b>Pretest End:</b>  <b>Staffing Complete:</b>  <b>SS Train Start:</b> 08/01/2024  <b>DC Start:</b> 08/05/2024 </div> <div> <b>Pretest Start:</b>  <b>Recruitment Start:</b>  <b>GIT Start:</b>  <b>SS Train End:</b>  <b>DC End:</b> 12/31/2024 </div> </div>		
Other Project Team Members	Data Manager - Brianna Sabol; Blaise Programmer - Max Malhotra; 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	Dec, 2024 (SAND COVID Follow-Up)	Implementing		
Risk Level	On Track			
Monthly Updates	December Update			
	Data Collection			
	- At the end of December, the project completed 1342 interviews, including 49 cases coded 1005. The project ended with a 55% response rate.			
	-his month's outreach included limited interviewer intervention. The project sent two emails, one text message, and a postcard. Calling only occurred the first week of December, and outreach focused on cases where prior contact was made or R completed the survey last wave.			
	- There was no interviewer attrition on this project.			
	- The Survey remained open in Qualtrics through 12/31/24.			
	Data Management / Technical			
	- Templates and data pulls needed to create and send batch emails.			
	- Planning for the project closeout and final deliverables are taking place.			
	Management Team			
	- The PI team approved additional costs for a postcard mailing to be sent in the middle of December. This mailing will be coordinated by SRO staff but printed and mailed by PCM. The additional cost for this effort is \$3,300 TC. These additional funds have not yet been added to the total budget because SAND COVID is currently projecting an underrun.			
Special Issues				
Cost as of Jan 17, 2025	Total Cost to Date (direct + indirect):	258,949.92		
	Est Cost at Completion (E\$AC):	267,954.98		
	Total Budget:	268,294.00		
	Variance (Total Budget minus- E\$AC):	339.02		
	Reason for Variance:	Actual costs are expected to match closely to the estimated cost to complete.		
Projections as of Jan 17, 2025	Dollars Projected for Month:	21,366.06		
	Actual Dollars Used:	18,491.12		
	Variance (Projected minus Actual):	2,874.94		
	Reason for Variance:	Technical hours for closeout activities were less than expected. The costs were moved to January when this work is expected to take place.		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:	1342	55%	
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(SCA Web 2024) SCA Web 2024 (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		
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Report Period	Dec, 2024 (SCA Web 2024)		Initiation
Risk Level	On Track		
Monthly Updates	The coding team completed coding for 735 cases during the December 2024 calendar month. Of those cases, 90 of them were randomly selected for IRR. IRR statistics remain within expected ranges for the project. The number of cases this calendar month reflects a pause in coding activity that started on 12/24 and ended in January 2025.		

Special Issues

Cost as of Jan 08, 2025	Total Cost to Date (direct + indirect):	8,926.68
	Est Cost at Completion (E\$AC):	41,364.67
	Total Budget:	50,730.00
	Variance (Total Budget minus- E\$AC):	9,365.33
	Reason for Variance:	Less than projected hours were charged by project leadership and programmers. Last month it was reported that one programmer significantly changed their hours, as that is still impacting the overall variance for the cost of the project. Overall, less costs associated with programming and management have caused an underrun.

Projections as of Jan 08, 2025	Dollars Projected for Month:	9,391.76
	Actual Dollars Used:	8,926.68
	Variance (Projected minus Actual):	465.08
	Reason for Variance:	Costs for the December 2024 month were on par with overall project projections. Although the project experienced less hours and costs associated with programming and managerial oversight, the project had more hours charged to coding due to the onboarding/training of a new coder.

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

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Report Period	Dec, 2024 (SCIP 2024)	Implementing
Risk Level	On Track	
Monthly Updates	The data collection phase of the project concluded on 12/9/2024. Following that, the DMSS team began post-data collection activities, including preparing the final production progress report and weighting data reports for the PIs. The PIs seem largely satisfied, although goals have yet to be achieved. The SRO continues to work with the ISR Business Office to obtain respondents' addresses for Tango card payments. In the meantime, the team staff began the lottery winners drawing process to pay \$100 per winner.	

Special Issues		
Cost as of Dec 31, 2024	<b>Total Cost to Date (direct + indirect):</b>	77,400.35
	<b>Est Cost at Completion (E\$AC):</b>	118,794.40
	<b>Total Budget:</b>	137,834.00
	<b>Variance (Total Budget minus- E\$AC):</b>	19,039.60
	<b>Reason for Variance:</b>	We have a favorable variance as of December 2024 after we adjusted staff hours based on their tasks needs. There was an underrun increased in December that was mainly due to paying out less incentive that we had projected. We will continue to monitor the remaining funds in the next three months.
Projections as of Dec 31, 2024	<b>Dollars Projected for Month:</b>	24,004.57
	<b>Actual Dollars Used:</b>	6,818.65
	<b>Variance (Projected minus Actual):</b>	17,185.92
	<b>Reason for Variance:</b>	a few staff used less hours than projected. We will increase some hours for two staff on post-data collection activities for the next three month.

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

Other Measures
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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 Investigator/Clients	Toni Antonucci (ISR) Kristine Ajrouch (ISR) Laura Zahodne (ISR)		
Funding Agency	NIH		
IRB	HUM#:		Period of Approval:
Project Team	Project Lead: Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Taghreid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 3400 interviews with respondents aged 35 years or older residing in the tri-county area of Southeast Michigan (Wayne, Oakland and Macomb counties) and 244 interviews with original Social Relations panel sample members aged younger than 65 years of age. The project involves screening up to 6900 new sample lines., with one selected respondent per household. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements (height, weight, blood pressure, grip strength) and saliva collection. The SRS 2023 project will use the same instrument programmed for the D-Amp project, with the only new programming being that for a screener. The screener will be translated into Arabic. No informant or proxy interview is included in the project scope. Interviews will be conducted in English or Arabic.		
SRO Project Period	09/2021 - 05/2023		
Data Col Period	05/2023 - 04/2024		
Security Plan	NA		
Milestones	<div><div><div>Pre Production Start: 09/01/2022</div><div>Pretest End:</div><div>Staffing Complete: 04/10/2023</div><div>SS Train Start: 05/18/2023</div><div>DC Start: 05/30/2023</div></div><div><div>Pretest Start:</div><div>Recruitment Start: 02/01/2023</div><div>GIT Start: 05/16/2023</div><div>SS Train End: 05/25/2023</div><div>DC End: 12/31/2024</div></div></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)		

<b>Report Period</b>	Dec, 2024 (SRS 2021)	Implementing
<b>Risk Level</b>	On Track	
<b>Monthly Updates</b>	SRS completed production interviewing in early January, having exceeded the revised goal for new sample cases (1349), and pushed the panel sample cases as close to the goal as possible with 203 completes. The end game program (increase in TOA to \$200, ability to do a shorter phone interview) made a huge difference in helping to increase the panel response rate. We completed 203 panel cases, which is far higher than we thought we could achieve with the resistant sample. This is lower than the desired n of 245, however just under 30% of the sample was resistant sample from previous waves. We believe the end-game program allowed us to complete an	

additional 60 to 70 interviews.

We submitted an amendment responding to the ORIO for the complaint lodged with the UM Compliance group. The amendment, which outlines how resistant cases are being handled, and the ORIO are currently being reviewed. We have reviewed all panel completes and identified cases that should be removed from the sample, versus coded as a refusal for the current wave. The list of removals will be provided to the research team as a final deliverable.

<b>Special Issues</b>				
<b>Cost as of Jan 21, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>			5,757,280.66
	<b>Est Cost at Completion (E\$AC):</b>			6,141,374.95
	<b>Total Budget:</b>			6,141,810.11
	<b>Variance (Total Budget minus- E\$AC):</b>			435.16
	<b>Reason for Variance:</b>			This is an insignificant variance in a project of this size. (CRS was not updated for this submission).
<b>Projections as of Jan 21, 2025</b>	<b>Dollars Projected for Month:</b>			184,862.46
	<b>Actual Dollars Used:</b>			179,243.97
	<b>Variance (Projected minus Actual):</b>			5,618.49
	<b>Reason for Variance:</b>			We missed projections on several key staff members due to unplanned absences.
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>	1300 new/244 panel		
	<b>Goal at Completion:</b>	1300 new, 244 panel		
	<b>Current Actual:</b>	1349 new /203 panel	32% scr/56% main	8.8 new/14.0 panel
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
<b>Other Measures</b>		Production is shown as of 1/21/2025.		

<b>Project Name</b>	<b>(STARRS-LS Waves 3, 4, 5 (Yr1)) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study (On Track)</b>		
<b>Project Mode</b>	Primary: Web	Secondary: Telephone	Total of Modes: 2
<b>Project Type</b>	Sponsored Projects		
<b>Budget</b>	<b>Direct Budget:</b> 8,809,515.00	<b>Indirect Budget:</b> 4,920,601.00	<b>Total Budget:</b> 13,730,116.00
<b>Principal Investigator/Clients</b>	James Wagner (University of Michigan) Robert Ursano (Uniformed Services University of the Health Scienc) Murray Stein / Ron Kessler (University of California San Diego / Harvard)		
<b>Funding Agency</b>	Department of Defense		
<b>IRB</b>	<b>HUM#:</b> HUM00180765	<b>Period of Approval:</b> 3/21/24 - 3/20/25	
<b>Project Team</b>	<b>Project Lead:</b> Meredith A House <b>Budget Analyst:</b> William Lokers <b>Production Manager:</b> Ruth B Philippou <b>Senior Project Advisor:</b> Lisa S Holland <b>Production Manager 1:</b> Jeffrey Albrecht Jr <b>Production Manager 2:</b> Lisa M Lewandowski-Romps		
<b>Proposal #</b>	no data		
<b>Description</b>	<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>		
<b>SRO Project Period</b>	05/2020 - 02/2025		
<b>Data Col Period</b>	11/2022 - 04/2024		
<b>Security Plan</b>	Yes		
<b>Milestones</b>	<div> <div> <b>Pre Production Start:</b> 04/01/2024  <b>Pretest End:</b>  <b>Staffing Complete:</b> 10/29/2024  <b>SS Train Start:</b> 11/21/2024  <b>DC Start:</b> 11/11/2024 </div> <div> <b>Pretest Start:</b>  <b>Recruitment Start:</b> 08/19/2024  <b>GIT Start:</b> 11/12/2024  <b>SS Train End:</b> 11/26/2024  <b>DC End:</b> 05/03/2026 </div> </div>		
<b>Other Project Team Members</b>	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		
<b>Other Project Name</b>	STARRS-LS Continuation		
<b>Sample Mgmt System</b>	MSMS		
<b>Data Col Tool</b>	Blaise 5		
<b>Hardware</b>	Laptop; Desktop; [UM cell] Phone		

<b>DE Software</b>	N/A
<b>QC Recording Tool</b>	Other (Blaise CARI)
<b>Incentive</b>	Yes, R
<b>Administration</b>	SRO Group
<b>Payment Type</b>	Check, post (\$50-\$100)
<b>Payment Method</b>	Check through other system (MSMS)

<b>Report Period</b>	Dec, 2024 (STARRS-LS Waves 3, 4, 5)	Implementing
<b>Risk Level</b>	On Track	

<b>Monthly Updates</b>	<p>Project Management and Planning:</p> <ul style="list-style-type: none"> <li>• We sent weekly production updates to the PIs, and reported on progress on the call with the Army/M&amp;RA.</li> <li>• Meredith created the agenda/notes and facilitated the weekly meeting with the STARRS project managers.</li> <li>• Budget/Funding: <ul style="list-style-type: none"> <li>o We sent the Year 6 (Wave 5 Yr2) budget details to Josh for USUHS/HJF on December 9. We understand that the pre-award notice and start letter will be issued in early February so U-M receives the start letter ahead of March 2025 for a hardship account to be put in place if the Year 6 award is not ready by that time.</li> <li>o USUHS requested that U-M put together a new 5 year plan/budget looking at March 2025 to February 2030, assuming our current plan of continuing the LS waves as is.</li> </ul> </li> <li>• IRB: <ul style="list-style-type: none"> <li>o The amendment which contains changes to a survey question (on cigarette use) for clarity, a new question on job searching, updates to the help resources list offered to respondents, as well as minor clean-up and administrative items was submitted on December 12.</li> <li>o The IRB sent back some contingencies on December 20 that will be addressed in January.</li> </ul> </li> </ul> <p>Enclave and User Support:</p> <ul style="list-style-type: none"> <li>• Annual security training renewal: We received completed training renewal materials from Enclave users. The final completion due date is January 31.</li> <li>• Annual IA security review: We awaited word from M&amp;RA and AAG about a possible upcoming site visit and about the annual enclave security review.</li> <li>• Annual NDI Data Request (2024 repeat search): The team worked on the NDI file processing. We are targeting late February 2024 for release.</li> <li>• 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"> <li>o We provided input into considerations regarding possible STARRS data sharing and collaboration with researchers from the Army G-9/DPRR.</li> <li>o COVID data were transferred to Jordan Smoller at MGB on December 9.</li> <li>o Enclave offboarding was in process for one VA/USUHS analyst and two U-M IT staff.</li> </ul> </li> <li>• Biomarker group request for assistance: <ul style="list-style-type: none"> <li>o STARRS genomic and survey variables to Yale: We awaited confirmation of successful download of all genomic and survey data that were transferred in September. The requestor reported a need to increase storage space on their limited access workstation to accommodate file download.</li> <li>o STARRS genomic, diagnostic and sociodemographic data sharing with DHA: We awaited further information from the requestor about variables of interest.</li> </ul> </li> </ul> <p>Public Use Data:</p> <ul style="list-style-type: none"> <li>• Inventory document: <ul style="list-style-type: none"> <li>o ICPSR released the updates for adding the biosample inventory documentation to the User Guide on December 4; the release was announced to M&amp;RA/GSC on December 11.</li> </ul> </li> <li>• Wave 4 <ul style="list-style-type: none"> <li>o Draft LSW4 documentation for the User Guide for the ICPSR public release of LSW4 data as well as the proposed changes to the ICPSR website were sent to the PIs/research team for review on December 6. Sign off was provided by December 13.</li> <li>o The LSW4 dataset, Master Respondent ID Linkage Table, and associated documents/updates were transferred to ICPSR on January 2. The target for release is May 2025.</li> </ul> </li> <li>• 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.</li> </ul> <p>Wave 5 Production Updates:</p> <ul style="list-style-type: none"> <li>• Wave 5 production statistics, as of January 8, 2024, are as follows: <ul style="list-style-type: none"> <li>o Replicates released: 2 of 14 released with 1,607 sample lines.</li> <li>o Completed interviews: 763 (740 web; 23 phone)</li> <li>o The first interviewer calling for Wave 5 began on December 6 when Replicate 1 moved to Phase 3. Phase 4 (continued calling; \$100/\$125) began on January 3, 2025. And the current response rate is 63.1%</li> <li>o Replicate 2 was released on December 16. By January 8, it was in phase 2. The response rate is currently 35.3%.</li> </ul> </li> </ul> <p>Safety Plan Results:</p> <ul style="list-style-type: none"> <li>• The Wave 5 combined Safety Plan rate is 10.4% as of January 8: <ul style="list-style-type: none"> <li>o Army Chaplains: <ul style="list-style-type: none"> <li>? 247 (# started IW), 222 (# completed IW), 10 (safety plan checks), 4.0% activation rate</li> </ul> </li> <li>o U-M CCP:</li> </ul> </li> </ul>	
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? 821 (# started IW), 763 (# completed IW), 75 (safety plan checks), 13.1% activation rate

<b>Special Issues</b>	The current areas of risk/mitigation strategies have not changed since last month.		
<b>Cost as of Nov 30, 2024</b>	<b>Total Cost to Date (direct + indirect):</b>	12,494,477.76	
	<b>Est Cost at Completion (E\$AC):</b>	13,563,364.90	
	<b>Total Budget:</b>	13,730,116.00	
	<b>Variance (Total Budget minus- E\$AC):</b>	166,751.10	
	<b>Reason for Variance:</b>	General underspending across salary groups. Projections updates this month included moving ST1 and ST2 hours forward for training, adjusting projections for Enclave costs that hit in Nov, and shifting Nick Hinkle-DeGroot's hours to Ricardo Rodriguez. Bill will request a no cost extension into March 2025 to spend down our underrun amount.	
<b>Projections as of Nov 30, 2024</b>	<b>Dollars Projected for Month:</b>	297,327.04	
	<b>Actual Dollars Used:</b>	264,417.85	
	<b>Variance (Projected minus Actual):</b>	32,909.19	
	<b>Reason for Variance:</b>	There was nothing very noteworthy on under or overspending. Some training hours still coming in lower than expected; they will likely hit next month.	
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>
	<b>Current Goal:</b>	10,689	75%
	<b>Goal at Completion:</b>	10,689	75%
	<b>Current Actual:</b>	763	63.1% (Rep 1)
	<b>Estimate at Complete:</b>	10,689	75%
	<b>Variance:</b>	0	0
<b>Other Measures</b>	Stats as of 1/8/25		

## Developmental/Initiative Projects Dashboard

[illegible]

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 Emipe 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 Emipe		
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	N/A		
QC Recording Tool	N/A		
Incentive	Not used		
Administration	N/A		
Payment Type	N/A		
Payment Method	N/A		
-----			
Report Period	Dec, 2024 (TSME25 Blaise 5 (423562))		Initiation
Risk Level	On Track		
Monthly Updates	Production work has gotten in the way. However, server load testing will pick back up in February.		
Special Issues			
Cost as of Jan 17, 2025	Total Cost to Date (direct + indirect):	1,048.66	
	Est Cost at Completion (E\$AC):	8,588.47	
	Total Budget:	10,000.00	



<b>Variance (Total Budget minus- E\$AC):</b>		1,411.53		
<b>Reason for Variance:</b>		na		
<b>Projections as of Jan 17, 2025</b>	<b>Dollars Projected for Month:</b>	0.00		
<b>Actual Dollars Used:</b>		0.00		
<b>Variance (Projected minus Actual):</b>		0.00		
<b>Reason for Variance:</b>		na		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
<b>Other Measures</b>				

Project Name	(TSME25 DCO Systems Support (483248)) TSME25 DCO Systems Support (483248) (On Track)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 40,000.00	Indirect Budget: 0.00	Total Budget: 40,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	<b>Project Lead:</b> Vivienne Y Outlaw <b>Budget Analyst:</b> Ivanna Iavorska-Em <b>Production Manager:</b> <b>Senior Project Advisor:</b> <b>Production Manager 1:</b> <b>Production Manager 2:</b>		
Proposal #	no data		
Description	To be determined		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </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	Dec, 2024 (TSME25 DCO Systems)		Implementing
Risk Level	On Track		
Monthly Updates	- Wrap up FOTY for 2025. Deployed Dev copy to prod server. Tech team tested the FOTY on prod server.		
Special Issues			
Cost as of Jan 09, 2025	<b>Total Cost to Date (direct + indirect):</b>		20,796.79
	<b>Est Cost at Completion (E\$AC):</b>		44,025.32
	<b>Total Budget:</b>		40,000.00
	<b>Variance (Total Budget minus- E\$AC):</b>		-4,025.32
	<b>Reason for Variance:</b>		Production projects took priority, and work on DCO systems moved to Jan.
Projections as of Jan 09, 2025	<b>Dollars Projected for Month:</b>		6,047.12
	<b>Actual Dollars Used:</b>		3,188.48

*Variance (Projected minus Actual):*

2,858.64

*Reason for Variance:*

Production projects took priority, and work on DCO systems moved to Jan.

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

x

Project Name	(TSME25 MSMS Line Generator (483227)) TSME25 MSMS Line Generator (483227) (On Track)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 10,500.00	Indirect Budget: 0.00	Total Budget: 10,500.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	<b>Project Lead:</b> Mark Simonson <b>Budget Analyst:</b> Nicole Danielle Doher <b>Production Manager:</b> Sarah Elisa Broumand <b>Senior Project Advisor:</b> Carol Lively <b>Production Manager 1:</b> <b>Production Manager 2:</b>		
Proposal #	no data		
Description	TSME25 MSMS Line Generator		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </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	Dec, 2024 (TSME25 MSMS Line Generator)		Planning
Risk Level	On Track		
Monthly Updates	Specification document has began the month of November. Planning to finalize by end of January and revisit project with Stakeholders.		
Special Issues			
Cost as of Jan 09, 2025	<b>Total Cost to Date (direct + indirect):</b>		1,853.81
	<b>Est Cost at Completion (E\$AC):</b>		10,500.00
	<b>Total Budget:</b>		10,500.00
	<b>Variance (Total Budget minus- E\$AC):</b>		0.00
	<b>Reason for Variance:</b> We don't anticipate going over budget.		
Projections as of Jan 09, 2025	<b>Dollars Projected for Month:</b>		160.79
	<b>Actual Dollars Used:</b>		-157.82

**Reason for Variance:**

Unable to work on this task due to competing deadlines. These hours will be consumed in December instead.

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

**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	Dec, 2024 (TSME25 MSMS Performance	Implementing	
Risk Level	On Track		
Monthly Updates	Work is proceeding		
Special Issues			
Cost as of Jan 09, 2025	Total Cost to Date (direct + indirect):	34,846.85	
	Est Cost at Completion (E\$AC):	77,406.27	
	Total Budget:	100,000.00	
	Variance (Total Budget minus- E\$AC):	22,593.73	
	Reason for Variance:	Update	
Projections as of Jan 09, 2025	Dollars Projected for Month:	7,258.20	
	Actual Dollars Used:	4,838.69	

Variance (Projected minus Actual):

2,419.51

Reason for Variance:

Update

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

Other Measures

Project Name	(TSME25 ODS Data Dictionary (425198)) TSME25 ODS Data Dictionary (425198) (On Track)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 4,500.00	Indirect Budget: 0.00	Total Budget: 4,500.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Mark Simonson		
	Budget Analyst:		
	Production Manager: Sarah Elisa Broumand		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	Request by Grant, TBD		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		
Milestones	<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	Dec, 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 Feb 2025) to understand detailed requirements of this project.		
Special Issues			
Cost as of Jan 09, 2025	Total Cost to Date (direct + indirect):	339.85	
	Est Cost at Completion (E\$AC):	339.85	
	Total Budget:	4,500.00	
	Variance (Total Budget minus- E\$AC):	4,160.15	
	Reason for Variance:	Unable to work on this task as planned due to competing tasks	
Projections as of Jan 09, 2025	Dollars Projected for Month:	1,939.82	
	Actual Dollars Used:	0.00	



*Variance (Projected minus Actual):*

1,939.82

*Reason for Variance:*

Working on project plan

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 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	<b>Project Lead:</b> Sarah Elisa Broumand <b>Budget Analyst:</b> Nicole Danielle Doher <b>Production Manager:</b> <b>Senior Project Advisor:</b> Shonda R Kruger-Ndiaye <b>Production Manager 1:</b> <b>Production Manager 2:</b> 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> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </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	Dec, 2024 (TSME25 QC Systems)		Implementing
Risk Level	On Track		
Monthly Updates	Brianna continues to work on automating loading preload for Verification Projects. Project released various report updates in December.		
Special Issues			
Cost as of Jan 09, 2025	<b>Total Cost to Date (direct + indirect):</b>		13,963.55
	<b>Est Cost at Completion (E\$AC):</b>		34,755.26
	<b>Total Budget:</b>		35,000.00
	<b>Variance (Total Budget minus- E\$AC):</b>		244.74
	<b>Reason for Variance:</b>		minimal variance;
Projections as of Jan 09, 2025	<b>Dollars Projected for Month:</b>		2,348.15
	<b>Actual Dollars Used:</b>		2,152.41

## 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: 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	Dec, 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>Breakdown of Activities:</p> <ol style="list-style-type: none"> <li>SRO ID Specification <ul style="list-style-type: none"> <li>Description: Define and specify the SRO ID requirements.</li> </ul> </li> <li>Proj Removal/Equip Return for ST25 <ul style="list-style-type: none"> <li>Description: Updated code for the removal of projects and return equipment for the ST25 initiative.</li> </ul> </li> <li>SurveyTrak: Add Code to Cleanup Temp Directory <ul style="list-style-type: none"> <li>Description: Implement code changes to ensure the cleanup of temporary directories within SurveyTrak 25.</li> </ul> </li> <li>ST Build 25.0.8: Build, Test Plan, Change Documentation <ul style="list-style-type: none"> <li>Description: Conduct the build process for version 25.0.8, including creating test plans and updating change documentation.</li> </ul> </li> <li>DB Reconcile Testing <ul style="list-style-type: none"> <li>Description: Perform testing activities to reconcile the database.</li> </ul> </li> <li>R-Pay</li> </ol>	

**Special Issues**

<b>Cost as of Jan 17, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	24,571.46
	<b>Est Cost at Completion (E\$AC):</b>	47,480.60
	<b>Total Budget:</b>	35,000.00
	<b>Variance (Total Budget minus- E\$AC):</b>	-12,480.60
	<b>Reason for Variance:</b>	see below

<b>Projections as of Jan 17, 2025</b>	<b>Dollars Projected for Month:</b>	4,491.90
	<b>Actual Dollars Used:</b>	6,287.80
	<b>Variance (Projected minus Actual):</b>	-1,795.90
	<b>Reason for Variance:</b>	see below

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

**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	<b>Project Lead:</b> David Bolt <b>Budget Analyst:</b> Nicole Danielle Doher <b>Production Manager:</b> <b>Senior Project Advisor:</b> Carol Lively <b>Production Manager 1:</b> <b>Production Manager 2:</b>		
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> <b>Pre Production Start:</b>  <b>Pretest End:</b>  <b>Staffing Complete:</b>  <b>SS Train Start:</b>  <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>  <b>Recruitment Start:</b>  <b>GIT Start:</b>  <b>SS Train End:</b>  <b>DC End:</b> </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		
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Report Period	Dec, 2024 (TSME25 Team Dynamix		Initiation
Risk Level	On Track		
Monthly Updates	<p>TSG determined that SRO (Interviewer) ID's will be pulled from FRED only, without populating non-interviewer ID's into TeamDynamix. This will allow the TeamDynamix implementation and development work to move forward without first building a new central SRO ID database for all staff/users.</p> <p>TeamDynamix API development work (~180 hours) projected to be conducted from January through May.</p>		
Special Issues			
Cost as of Jan 17, 2025	<b>Total Cost to Date (direct + indirect):</b>		62.95
	<b>Est Cost at Completion (E\$AC):</b>		10,562.95
	<b>Total Budget:</b>		21,000.00
	<b>Variance (Total Budget minus- E\$AC):</b>		10,437.05
	<b>Reason for Variance:</b>		na

Projections as of Jan 17, 2025		Dollars Projected for Month:		1,750.00
		Actual Dollars Used:		0.00
		Variance (Projected minus Actual):		1,750.00
		Reason for Variance: na		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(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		
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Report Period	Dec, 2024 (TSME25 Translation Tool)		Planning
Risk Level	On Track		
Monthly Updates	There are no new updates for December. A small group met in January to review the plan and will regroup with updates in March. Things will pick up once Kelly completes some current production work in the next week or two.		
Special Issues			



Cost as of Jan 17, 2025	Total Cost to Date (direct + indirect):	1,454.49
	Est Cost at Completion (E\$AC):	8,332.60
	Total Budget:	10,500.00
	Variance (Total Budget minus- E\$AC):	2,167.40
	Reason for Variance:	na

Projections as of Jan 17, 2025	Dollars Projected for Month:	0.00
	Actual Dollars Used:	219.44
	Variance (Projected minus Actual):	-219.44
	Reason for Variance:	na

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

Other Measures

Project Name	(TSME25 UI Test and Splunk (423463)) TSME25 Automated UI Testing & Splunk Implementation (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	pending update		
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		
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Report Period	Dec, 2024 (TSME25 UI Test and Splunk)		Initiation
Risk Level	On Track		
Monthly Updates	1. Max continued to research the Appium platform for MSMS DCA testing. 2. HD and MSMS have started to use Splunk for testing.		
Special Issues			
Cost as of Jan 17, 2025	Total Cost to Date (direct + indirect):		6,875.90
	Est Cost at Completion (E\$AC):		27,875.90
	Total Budget:		42,000.00
	Variance (Total Budget minus- E\$AC):		14,124.10
	Reason for Variance:		
Projections as of Jan 17, 2025	Dollars Projected for Month:		3,500.00

*Actual Dollars Used:* 6,875.90

*Variance (Projected minus Actual):* -3,375.90

*Reason for Variance:*

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