
Survey Research Operations

Monthly Project Report

Sponsored Data Collection Projects and Development Initiative

March 2025



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
(FFCWS) Future of Families and Child Wellbeing Study
(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
(PSID25) Panel Study of Income Dynamics Core 2025
(SAFEGUARD) SAFEGUARD
(SAND COVID Follow-Up) Study of Adolescent to Adult Neural Development (SAND) COVID-19 Follow-up Study
(SCA Web 2025) SCA Web 2025
(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
(WaISS) U-M Wallenberg Institute Student Survey
(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 TEAM LOCATION (424466)) TSME25 TEAM LOCATION (424466)
(TSME25 Translation Tool (483424)) TSME25 Translation Tool (483424)

Sponsored Projects Dashboard

NonArchived Sponsored Projects						
Project	Type	Phase	Project Lead	Jan	Feb	Mar
ANES 2024	Sponsored	Implementing	Andrew L Hupp	🟡	🟢	🟢
BFY	Sponsored	Implementing	Piotr Dworak	🟢	🟢	🟢
BHM Library Project	Sponsored	Closing	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	🟢	🟢	🟢
FFCWS	Sponsored	Initiation	Rebecca Gatward	🟡	🟡	🟢
Health and Well Being in SE MI	Sponsored	Implementing	Barbara Lohr Ward	🟢	🟢	🟢
Healthy Brain Project	Sponsored	Implementing	Barbara Lohr Ward	🟢	🟢	🟢
Hospitals Sharing Data	Sponsored	Implementing	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	Closing	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	Closing	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	🟢	🟢	🟢
PSID25	Sponsored	Implementing	Rachel Anne Orlowski	🟢	🟢	🟢
SAFEGUARD	Sponsored	Planning	Daniel Tomlin	🟡	🟡	🟢
SAND COVID Follow-Up	Sponsored	Closing	Elizabeth Ohryn	🟢	🟢	🟢
SCA Web 2025	Sponsored	Initiation	William Keating	🟢	🟢	🟢
SCIP 2024	Sponsored	Closing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢
SRS 2021	Sponsored	Closing	Barbara Lohr Ward	🟢	🟢	🟢
STARRS-LS Waves 3, 4, 5 (Yr1)	Sponsored	Implementing	Meredith A House	🟢	🟢	🟢
WaISS	Sponsored	Initiation	Jeffrey Albrecht Jr	🟡	🟢	🟢

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: 4,892,421.00	Indirect Budget: 2,633,819.00	Total Budget: 7,526,240.00
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	<div><div><div>Pre Production Start: 03/01/2024</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start: 07/10/2024</div><div>DC Start: 08/01/2024</div></div><div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start: 07/09/2024</div><div>SS Train End:</div><div>DC End: 03/31/2025</div></div></div>		
Other Project Team Members	Erin McSpadden - Project Manager for the methods pilot Sharon Parker - Production Manager for the methods pilot Raphael Nishimura - Sampling (pilot and production) Paul Burton - Sampling and Reporting Makenna Harrison - Sampling and Reporting 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; Other (Additional monitor for video interviews)		
DE Software	External vendor (MSG)		
QC Recording Tool	Camtasia		

Incentive	Yes, R; Yes, INF; Yes, Other (Spouse/partner)
Administration	SRO Group
Payment Type	Check, post (\$25/\$40 Escalation to \$100; \$150 for in-person); Cash, prepaid (\$5/\$10 Pre-election visible cash); Cash, post (Pre/Post-Election token amount)
Payment Method	Check through STrak RPay System; Check through other system (MSMS via RPay); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (MSMS via RPay); Imprest Cash Fund from ISR Business Office (MSMS via RPay)

Report Period	Mar, 2025 (ANES 2024)	Implementing
Risk Level	On Track	

Monthly Updates	<p>The 2024 data collection has ended.</p> <p>In-person:</p> <ul style="list-style-type: none"> -PRE: 1,042 interviews (966 in-person, 68 phone, 8 mixed + 0 partials) -POST: 90% reinterview goal (n=938) -Actual: 925 (89%); 372 In-person, 220 Telephone, 332 Video + 1 partial <p>Web - Fresh</p> <ul style="list-style-type: none"> -PRE: 2,063 interviews (2,022 + 41 partials) -POST: 85% reinterview goal (n=1,754) -Actual: 1,769 (86%) (1,721 + 48 partials) <p>Web - Panel</p> <ul style="list-style-type: none"> -PRE: 2,171 interviews (2,158 + 13 partials) -POST: 90% reinterview goal (n=1,954) -Actual: 2,070 (95%) (2,040 + 30 partials) <p>Web - GSS</p> <ul style="list-style-type: none"> -PRE: 987 interviews (978 + 9 partials) -POST: 85% reinterview goal (n=839) -Actual: 807 (82%) (807 + 26 partials) <p>Paper</p> <ul style="list-style-type: none"> -PRE: 245 -POST: 85% reinterview goal (n=208) -Actual: 202 (82%) <p>SRO is coding religion, occupation, industry, and most important problems (MIP).</p> <p>SRO provided a ballpark for a NRFU operation. They have asked for a revised sample size based on \$100,000 direct rather than the \$150,000 direct in the original ballpark. This has been shelved for now.</p> <p>The remaining work on the study consists of weighting, clean-up, and the technical (methodology) report.</p>	
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Special Issues		
Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):	7,058,718.34
	Est Cost at Completion (E\$AC):	7,384,233.13
	Total Budget:	7,526,240.00
	Variance (Total Budget minus- E\$AC):	142,006.87
	Reason for Variance:	Project staff transferred ~\$600,000 to cover the anticipated overrun. *Note that the indirect costs on the \$600,000 are going to go back to CPS.
Projections as of Apr 17, 2025	Dollars Projected for Month:	237,279.81
	Actual Dollars Used:	191,639.06
	Variance (Projected minus Actual):	45,640.75
	Reason for Variance:	Actual hours were ~700 less than projected hours. Some of those hours have been pushed forward for screenshots and coding.

Measures		Units at Complete	RR	HPI
	Current Goal:	1,200/938	See monthly update	10.5/6.0
	Goal at Completion:			
	Current Actual:	1,042/925		14.15/6.63
	Estimate at Complete:			
	Variance:			

Other Measures	
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Project Name	(BFY) Baby's First Years (On Track)												
Project Mode	Primary: Face to Face Total of Modes: 1												
Project Type	Sponsored Projects												
Budget	Direct Budget: 6,590,315.34	Indirect Budget: 2,109,819.29	Total Budget: 8,700,134.63										
Principal Investigator/Clients	Dr. Greg Duncan (University of California - Irvine)												
	Dr. Kimberly Noble (Teachers College Columbia University)												
	Dr. Katherine Magnuson (University of Wisconsin)												
Funding Agency	National Institute of Child Health and Human Development (NICHD)												
IRB	HUM#: HUM00137963	Period of Approval:											
Project Team	Project Lead: Piotr Dworak												
	Budget Analyst: David Kellermeyer												
	Production Manager: Veronica Connors-Burge												
	Senior Project Advisor: Stephanie A Chardoul												
	Production Manager 1: Margaret Lavanger												
	Production Manager 2:												
Proposal #	no data												
Description	<p>University of Michigan Survey Research Center (U-M SRC) is contracted to recruit and interview participants for Baby's First Years -- a longitudinal randomized control trial study.</p> <p>The study's full name, listed on sub-contract documents, is Household Income and Child Development in Early Years. The study will draw on a convenience sample of mothers and their newborns in four US metropolitan areas: New York City; Omaha/Lincoln; New Orleans; and Minneapolis. One or two hospitals, listed in this application, will be used as recruiting sites in each area. The study uses a randomized control trial design in which low-income mothers and newborns will be randomly assigned to a treatment group that receives an unconditional income enhancement -- cash payments of \$333 per month—an amount roughly comparable to a variety of income assistance policies in the U.S. and shown to be associated with meaningful improvements for poor children in prior studies—or to a control condition that receives \$20 per month. In both groups, the payments will be made for the first 40 months of the child's life. To understand the impacts of added income on children's development, researchers will assess treatment/control group differences at ages 1, 2 and 3 on measures of cognitive, language, memory, self-regulation and socio-emotional development. Recruitment is scheduled to start in April of 2018, and each follow-up interview will be conducted 12 months later -- close in time to the child's 1st, 2nd, and 3rd birthday. The feasibility of the approach has been established in a one-year pilot conducted in 2014 at the New York Presbyterian Hospital/Columbia University Medical Center.</p> <p>The Principal Investigators are Dr. Greg Duncan from University of California Irvine (UCI), Dr. Kimberly Noble from Teacher's College Columbia University (TCCU), and Katherine Magnuson from University of Wisconsin-Madison (UWM). UCI (Dr. Duncan) and TCCU (Dr. Noble) are the institutions and signatories funding the U-M SRC subcontract from various sources including the National Institute for Child Health and Human Development (NICHD) and private foundations listed in this application. The study research team also includes co-investigators Lisa Gennetian (New York University), and Hiro Yoshikawa (New York University).</p> <p>SRO will be responsible for four interactions with the selected mothers/infants:</p> <ul style="list-style-type: none"> • Baseline will occur immediately (within 24-48 hours) after birth, in the hospital; • Wave 1 will be a telephone interview with the mother when the child is 12 months old; • Wave 2 will be an in-person interview in the family's home that includes survey, developmental assessment, biomarker collection, and video recorded behavioral interaction when the child is 24 months old; • Wave 3 will be an in-person survey done while the mother and child are visiting a lab for other clinical tests when the child is 36 months old. <p>Each data collection phase/wave will be a full 12 months, with Baseline starting in April 2018:</p> <p>Recruitment/Baseline: 04/01/2018 - 03/31/2019 Wave 1: 04/01/2019 - 03/31/2020 Wave 2: 04/01/2020 - 03/31/2021 Wave 3: 04/01/2021 - 03/31/2022</p>												
SRO Project Period	10/2017 - 12/2020												
Data Col Period	04/2018 - 12/2020												
Security Plan	NA												
Milestones	<table border="0"> <tr> <td>Pre Production Start: 10/01/2017</td> <td>Pretest Start:</td> </tr> <tr> <td>Pretest End:</td> <td>Recruitment Start: 01/01/2018</td> </tr> <tr> <td>Staffing Complete: 02/07/2018</td> <td>GIT Start: 03/19/2018</td> </tr> <tr> <td>SS Train Start: 03/20/2018</td> <td>SS Train End: 03/22/2018</td> </tr> <tr> <td>DC Start: 05/07/2018</td> <td>DC End: 06/30/2022</td> </tr> </table>			Pre Production Start: 10/01/2017	Pretest Start:	Pretest End:	Recruitment Start: 01/01/2018	Staffing Complete: 02/07/2018	GIT Start: 03/19/2018	SS Train Start: 03/20/2018	SS Train End: 03/22/2018	DC Start: 05/07/2018	DC End: 06/30/2022
Pre Production Start: 10/01/2017	Pretest Start:												
Pretest End:	Recruitment Start: 01/01/2018												
Staffing Complete: 02/07/2018	GIT Start: 03/19/2018												
SS Train Start: 03/20/2018	SS Train End: 03/22/2018												
DC Start: 05/07/2018	DC End: 06/30/2022												

Other Project Team Members	Stephanie Chardoul (SPA) Piotr Dworak (Lead) Tony Romanowski (PM) Daric Thorne (PM/SSA) Barb Homburg (PM) Peggy Lavanger (PM) Jim McClure (DCS) Jeff Smith (tech lead) Jim Rodgers (MSMS consultant) Andrew Hupp (MSMS consultant) Pam Swanson (MSMS programmer) Dave Dybicki (Blaise) Colette Keyser (Blaise) Tricia Blanchard (MSMS) Kyle Goodman (Help Desk)	
Other Project Name	HHICD Household Income and Childhood Development	
Sample Mgmt System	MSMS	
Data Col Tool	Blaise 5	
Hardware	Laptop; [UM cell] Phone	
DE Software	N/A	
QC Recording Tool	Other (to be specified)	
Incentive	Yes, R	
Administration	SRO Group	
Payment Type	Cash, prepaid (50)	
Payment Method	Check through other system (MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (MSMS)	

Report Period	Mar, 2025 (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 February 13 we have sent the last batch of respondents recruited for the Age 6 Lab visits conducted by the PI research team on-site in LA, MN, NE, and NY.</p> <p>We are now focusing on helping the research team with the hard to reach Rs which will include some travel (most likely to MN) and re-contacting cases which completed the lab visit. Re-contacting will continue through August 2027.</p> <p>We are currently following up with cases which reach Age 6 + 4 months and have completed their lab visit.</p> <p>Project Staffing:</p> <p>One of project lwers/TLs has been promoted to a PM and starting their work to relieve a more senior PM. We expect this will lead to some savings in the longer run.</p> <p>9 iwers in total NE: 1 OS (1 NH resigned) MN: 0 local (1 resigned) NY: 2 OS (was 3, -1 promoted to PM) NOLA: 1 Locators: 2 TLs: 1</p> <p>Technical system: Working as expected.</p>	
Special Issues		
Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):	7,945,678.96
	Est Cost at Completion (E\$AC):	8,721,232.03
	Total Budget:	8,700,134.63
	Variance (Total Budget minus- E\$AC):	-21,097.40
	Reason for Variance:	Total overrun continues to be a concern on the project. However, we have some allocation for travel "parked" in 2027 and our current staffing mix should reduce the overrun in the upcoming months.

Projections as of Apr 17, 2025		<i>Dollars Projected for Month:</i>		47,639.64
		<i>Actual Dollars Used:</i>		20,011.17
		<i>Variance (Projected minus Actual):</i>		27,628.47
		<i>Reason for Variance:</i> The monthly projections were off and will need to be reviewed.		
Measures		Units at Complete	RR	HPI
	<i>Current Goal:</i>	n/a	n/a	n/a
	<i>Goal at Completion:</i>	n/a	n/a	n/a
	<i>Current Actual:</i>	n/a	n/a	n/a
	<i>Estimate at Complete:</i>	n/a	n/a	n/a
	<i>Variance:</i>			
Other Measures				

Project Name	(BHM Library Project) Developing a Model of Black History Month Programming in Public Libraries (Some Concerns)		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 126,712.00	Indirect Budget: 70,959.00	Total Budget: 197,671.00
Principal	Deborah Robinson (ISR)		
Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Karin Schneider		
	Budget Analyst:		
	Production Manager:		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	SRO will support the project in the first year by working with you to design the sample. SRO will support the implementation of up to two pilot surveys and the larger national survey of libraries. We will provide consultation on scale development throughout the pilot phase and provide statistical support to finalize the scales and provide a working dataset (with weights to account for the stratified sample design). In total, the SRO period of performance will be approximately 24 months in duration, starting in February of 2023, with data collections for the pilots and national survey taking place over approximately 12 months, starting in late 2023.		
SRO Project Period	02/2023 - 02/2025		
Data Col Period	10/2023 - 09/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 02/28/2025 </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	Mar, 2025 (BHM Library Project)		Closing
Risk Level	Some Concerns		
Monthly Updates	Termination notice received from sponsor 4/15/2025 indicating no costs can be incurred after 4/8/2025.		
	March activities: Finalizing data, working with DMSS to start analysis on factors, analysis weights.		
Special Issues			
Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):	199,290.06	
	Est Cost at Completion (E\$AC):	214,392.53	
	Total Budget:	197,671.00	

Variance (Total Budget minus- E\$AC):		-16,721.53		
Reason for Variance:		See previous months - data collection and project extension, addition of oversign		
Projections as of Apr 17, 2025 Dollars Projected for Month:		19,390.34		
Actual Dollars Used:		13,277.64		
Variance (Projected minus Actual):		6,112.70		
Reason for Variance:		Wen, Makenna and Raphael mostly charging in first week of April.		
Measures		Units at Complete	RR	HPI
	Current Goal:	1575	30	
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

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

Report Period	Mar, 2025 (CARE Military)		Implementing	
Risk Level	On Track			
Monthly Updates	<p>The SRO team is working towards the goal of 7500 (Civ)/5000 (Mil) target through January 2026. The administrative process to transfer funds to SRO for the extension (to 01/26) is in progress.</p> <p>There is no update on whether/when the Technical Systems development will happen.</p> <p>Production The system screening for respondents is turning up errors so the protocols are being reworked. The Spring Newsletters was emailed all respondents. The SRO team continue to work with Datalys and Quesgen to resolve system issues.</p> <p>A new cohort of respondents is being "created". Military participants recruited while doing Explosive Ordnance Disposal (EOD) training at the Eglin Base are being looked at as a unique group. A separate report has been created to monitor productivity for this Eglin group.</p> <p>At the end of March 2025, the ISR has a total of 22,515 military (DCP2 + DCP3) samples, and 4372 military cases have been completed. Eglin group has a total of 204 sample, and 16 cases have been completed.</p>			
Special Issues				
Cost as of Mar 31, 2025	Total Cost to Date (direct + indirect):		1,684,473.95	
	Est Cost at Completion (E\$AC):		1,684,473.95	
	Total Budget:		1,685,902.70	
	Variance (Total Budget minus- E\$AC):		1,428.75	
	Reason for Variance:		<p>We do not have new funding currently to support the military work. However, military work resumed in April 2024 with civilian funds.</p> <p>**Note: In March 2025, we allocated \$39,652.61 to the Military project with the Civilian funds. This brings our cumulative spending on the military project to \$531,705.55 from April to March 2025. The current spending on Military is reflected the underrun amount in Civilian funds.</p>	
Projections as of Mar 31, 2025	Dollars Projected for Month:		0.00	
	Actual Dollars Used:		52,516.66	
	Variance (Projected minus Actual):		-52,516.66	
	Reason for Variance:		Since we are using Civilian funds there are no projections for this account.	
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022 (On Track)												
Project Mode	Primary: Telephone	Secondary: Web	Total of Modes: 2										
Project Type	Sponsored Projects												
Budget	Direct Budget: 3,718,978.00	Indirect Budget: 966,936.00	Total Budget: 4,685,914.00										
Principal	Dr. Steven Broglio (U of M Kinesiology)												
Investigator/Clients	Dr. Michael McCrea (Medical College of Wisconsin)												
	Dr. Thomas McAllister (Indiana University School of Medicine)												
Funding Agency													
IRB	HUM#: 00202691	Period of Approval: 7/23/2021 - open											
Project Team	Project Lead: Donnalee Ann Grey-Farquharson												
	Budget Analyst: David Kellermeyer												
	Production Manager: Barbara Aghababian-Homburg												
	Senior Project Advisor: Barbara Lohr Ward												
	Production Manager 1: Hongyu Johnson												
	Production Manager 2: Keith Liebetreu												
Proposal #	no data												
Description	<p>In 2014, the U.S. Department of Defense (DoD) and the National Collegiate Athletic Association (NCAA) established and funded the Concussion Assessment, Research and Education (CARE) Consortium to inform science, clinical care and public policy related to concussion and repetitive head impact exposure (HIE) in U.S. Military Service Academy (MSA) cadets and collegiate student-athletes. Since then, CARE has enrolled >50,000 MSA cadets/midshipmen and NCAA student-athletes from 30 participating collegiate institutions, representing 26 NCAA sports, and military training and other recreational activities. In addition, the CARE study has captured data on over 5,000 concussed cadets/midshipmen and athletes – the largest concussion database of its kind. This public-private study is designed to answer key knowledge gaps around clinical and neurobiological recovery, brain structure and function, and factors predicting outcomes in MSA members and NCAA student-athletes. This CARE/SALTOS Integrated (CSI) Study phase investigates the nature and causes of long-term effects of head impact exposure and concussion/mild traumatic brain injury (mTBI) in former NCAA student-athletes and military service members. The data collected in this phase will build on that collected in previous phases</p> <p>SRO provides consultation, respondent locating activities and data collection for respondents in the longitudinal Concussion Assessment, Research and Education (CARE) study, with the goal of securing participation from 7,500 unique past-CARE study participants. Participants will complete the same set of study assessments at two time points over the five-year project period. The project follows collegiate athletes post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure. Specifically, SRO decentralized field interviewers will locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.</p> <p>This budget assumes an overall SRO involvement period of approximately 44 months over two waves. Wave 1 SRO involvement will begin in December 2021 with data collection taking place over approximately 12 months, beginning approximately May 2022. Wave 2 SRO involvement will begin in November 2023 with data collection taking place over approximately 12 months starting in May 2024.</p> <p>Currently, the total cost for the overall scope of work (based on the currently committed funding from all sources) is estimated at \$4,685,914. This includes \$3,718,978 direct and \$966,936 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders). As additional sources of funding are identified and those resources committed to SRO survey data collection activities, or inversely if a funder withdraws or reduces their level of funding to the project, the scope of work (e.g., the number of interviews to be collected) will increase or decrease respectively.</p> <p>The estimate of funding contributed by the Department of Defense through the MTEC RFP is \$2,277,689. This includes \$1,807,689 direct costs and \$470,000 indirect costs budgeted at the 26% indirect cost rate. The proposed period of support is September 1, 2021 through August 31, 2025.</p>												
SRO Project Period	10/2021 - 08/2026												
Data Col Period	03/2022 - 02/2026												
Security Plan	NA												
Milestones	<table border="0"> <tr> <td>Pre Production Start:</td><td>Pretest Start:</td></tr> <tr> <td>Pretest End:</td><td>Recruitment Start:</td></tr> <tr> <td>Staffing Complete:</td><td>GIT Start:</td></tr> <tr> <td>SS Train Start:</td><td>SS Train End:</td></tr> <tr> <td>DC Start:</td><td>DC End:</td></tr> </table>			Pre Production Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Complete:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
Pre Production Start:	Pretest Start:												
Pretest End:	Recruitment Start:												
Staffing Complete:	GIT Start:												
SS Train Start:	SS Train End:												
DC Start:	DC End:												

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

Report Period	Mar, 2025 (CARE SALTOS MTEC)	Implementing
Risk Level	On Track	
Monthly Updates	<p>The SRO team is working towards the goal of 7500 (Civ)/5000 (Mil) target through January 2026. The administrative process to transfer funds to SRO for the extension (to 01/26) is in progress.</p> <p>There is no update on whether/when the Technical Systems development will happen.</p> <p>Production The system screening for respondents is turning up errors so the protocols are being reworked. The Spring Newsletters was emailed all respondents. The SRO team continue to work with Datalys and Quesgen to resolve system issues.</p> <p>A new cohort of respondents is being "created". Military participants recruited while doing Explosive Ordnance Disposal (EOD) training at the Eglin Base are being looked at as a unique group. A separate report has been created to monitor productivity for this Eglin group.</p> <p>At the end of March 2025, the ISR has a total of 33,147 civilian (DCP2 + DCP3) samples, and 6308 civilian cases have been completed.</p>	

Special Issues		
Cost as of Mar 31, 2025	Total Cost to Date (direct + indirect):	3,838,325.08
	Est Cost at Completion (E\$AC):	4,623,655.53
	Total Budget:	4,685,914.00
	Variance (Total Budget minus- E\$AC):	62,258.47
	Reason for Variance:	<p>The current overrun is about \$8k more than last month due to some staff used less hours than projected. We will continue to make adjustments in the next months. Also, with the expected extension of data collection these funds will be absorbed and may be used to add an additional ~10 days of data collection to the extension.</p> <p>**Note: In March 2025, we allocated \$39,652.61 to the Military project with the Civilian funds. This brings our cumulative spending on the military project to \$531,705.55 from April to March 2025. The current spending on Military is reflected the underrun amount in Civilian funds.</p>

Projections as of Mar 31, 2025	Dollars Projected for Month:	150,320.99
	Actual Dollars Used:	138,726.77
	Variance (Projected minus Actual):	11,594.22
	Reason for Variance:	Overall, the interviewer actual hours are on track when comparing to the projected hours. A few SRO staff members used less hours than projected.

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

Other Measures

Project Name	(CCS) Community College Survey (On Track)		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 560,774.00	Indirect Budget: 84,115.00	Total Budget: 644,889.00
Principal	Hana Lahr (Teachers College, Columbia University)		
Investigator/Clients	Veronica Minaya (Teachers College, Columbia University)		
	Rachel Baker (University of Pennsylvania)		
Funding Agency	Ascendium Education Group		
IRB	HUM#: 00237400	Period of Approval:	
Project Team	Project Lead: Jeffrey Albrecht Jr		
	Budget Analyst: Nicole Danielle Doherty		
	Production Manager: Ruth B Philippou		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1: Steven Sonoras		
	Production Manager 2:		
Proposal #	no data		
Description	The CCS seeks to understand factors that influence first year community college students in their program choice. We will survey a selection of students entering a community college for the first time in the fall of 2023 and then follow up with them in the second semester (Spring 2024) and their third semester (Fall 2024). The researchers will recruit 4 community colleges to participate.		
SRO Project Period	01/2023 - 03/2025		
Data Col Period	10/2023 - 11/2024		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 08/01/2024</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start: 10/23/2024</div><div>DC Start: 10/14/2024</div></div> <div><div>Pretest Start:</div><div>Recruitment Start: 09/17/2024</div><div>GIT Start:</div><div>SS Train End: 10/23/2024</div><div>DC End: 12/08/2024</div></div>		
Other Project Team Members	Marsha Skoman - Qualtrics Programmer Ed Green - Data Manager Hueichun Peng - Web SMS Programmer		
Other Project Name	How Community College Students Choose Programs of Study		
Sample Mgmt System	Web SMS		
Data Col Tool	Other (Qualtrics)		
Hardware	Desktop		
DE Software	NA		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Cash, prepaid (\$5); Cash, post (\$40); Other (Visa electronic gift cards, Amazon gift codes)		
Payment Method	Imprest Cash Fund from ISR Business Office; Other (VISA eGift cards from HSIP, Amazon gift codes from Teachers Coll)		
=====			
Report Period	Mar, 2025 (CCS)		Closing
Risk Level	On Track		
Monthly Updates	In March, the proposals team provided a ball park to mail a contact information update invitation letter to CCS respondents. Jeffrey continued to write and prepare for the upcoming AERA presentation on the production experiment findings.		
Special Issues	No special issues		
Cost as of Apr 09, 2025	Total Cost to Date (direct + indirect):		853,538.03
	Est Cost at Completion (E\$AC):		857,212.79

Total Budget:		644,889.00		
Variance (Total Budget minus- E\$AC):		-21,996.79		
Reason for Variance:		In March, we approved/received a no cost extension on the CCS project through the end of 2025, so that we can follow up with the CCS respondents this fall to let them know to expect another two waves of follow up. There is \$6,540.62 remaining in cost share that will be used to send an email and text message.		
Projections as of Apr 09, 2025	Dollars Projected for Month:	4,619.91		
Actual Dollars Used:		4,711.62		
Variance (Projected minus Actual):		91.71		
Reason for Variance:		Fringe benefits and R&D variance		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

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 - 05/2027		
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 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	Blaise 4.8 BIA		
QC Recording Tool	Other (TBD)		
Incentive	Not used		
Administration	NA		
Payment Type	N/A		
Payment Method	N/A		

Report Period	Mar, 2025 (CVFS-SCAN)		Implementing
Risk Level	On Track		
Monthly Updates	Project Updates:		
	Part 1 of the Respondent questionnaire is currently in production. There are 935 completed R Part 1's, and 843		

completed Inf interviews. Part 2 is fully tested in CTT in both English and Nepali, and will be moved to Surveytrak for testing within the next couple of days. The Health Assessment is almost fully tested in English in CTT and we have received Nepali translations. Once those are ready those will be tested in CTT and then moved to Surveytrak.

The WBD Surveytrak is being tested by SRO, and soon to be tested by ISER-N.

The WBD process flow has been determined and currently the SRO team is exploring Survey123 for scanning Blood Tubes. Scanning into Survey123 with the Iwer phone, vs. using a barcode scanner into Surveytrak are 2 options to be presented to ISER-N. They will likely want to use Iwer phones to scan into Survey123. Systems and instruments will be finalized, but ISER-N has been having difficulty procuring materials needed, such as blood tubes.

The data collection end date has not been shared with SRO, nor the Wave 2 dates. The PI continues to say he needs to discuss dates with the other PIs. These dates are critical to determine a more accurate close is accurate. The PI assures us that he will confirm this with the other PIs very soon.

Special Issues	Blaise programming delays, Pretest delays,			
Cost as of Apr 15, 2025	Total Cost to Date (direct + indirect):	332,901.78		
	Est Cost at Completion (E\$AC):	550,701.18		
	Total Budget:	575,439.00		
	Variance (Total Budget minus- E\$AC):	24,737.82		
	Reason for Variance:	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.		
Projections as of Apr 15, 2025	Dollars Projected for Month:	38,582.09		
	Actual Dollars Used:	34,008.61		
	Variance (Projected minus Actual):	4,573.48		
	Reason for Variance:	The underrun was due to less programmer time being charged than projected. Unused hours were moved forward.		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(FFCWS) Future of Families and Child Wellbeing Study (On Track)		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 2,907,209.00	Indirect Budget: 1,628,048.00	Total Budget: 4,535,257.00
Principal Investigator/Clients	Kathryn Edin (Princeton University) Jane Waldfogel (Columbia University) Anna Haskins (University of Notre Dame)		
Funding Agency	Eunice Kennedy Shriver National Institute of Child Health and Human Development (NICHD)		
IRB	HUM#: HUM00255752	Period of Approval:	
Project Team	Project Lead: Rebecca Gatward		
	Budget Analyst: Joseph Zylka		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>The Future of Families and Child Wellbeing Study (FFCWS, formerly The Fragile Families and Child Wellbeing Study) is based on a stratified, multistage sample of 4898 children born in 20 large U.S. cities (with populations over 200,000) between 1998 and 2000, where births to unmarried mothers were oversampled by a ratio of 3 to 1. This sampling strategy resulted in the inclusion of a large number of Black, Hispanic, and low-income families. Mothers were interviewed shortly after birth and fathers were interviewed at the hospital or by phone. Follow-up interviews have been conducted when children were approximately ages 1, 3, 5, 9, 15, and 22. When weighted, the data are representative of births in large US cities.</p> <p>The FFCWS consists of a core survey with mothers, fathers, primary caregivers, and the child (now a young adult). Additionally, collaborative project contribute questions to the surveys and collect new data on a subset of parents and children.</p> <p>Beginning with the baseline interviews in 1998-2000, the core study was originally designed to primarily address four questions of great interest to researchers and policy makers:</p> <p>1. What are the conditions and capabilities of unmarried parents, especially fathers? 2. What is the nature of the relationships between unmarried parents? 3. How do children born into these families fare? and 4. How do policies and environmental conditions affect families and children?</p> <p>Princeton are the IRB of record for this project and we have established a reliance agreement (HUM00255752).</p>		
SRO Project Period	10/2024 - 06/2029		
Data Col Period	01/2026 - 12/2026		
Security Plan	NA		
Milestones	<div>Pre Production Start:</div> <div>Pretest End:</div> <div>Staffing Complete:</div> <div>SS Train Start:</div> <div>DC Start:</div> <div>Pretest Start:</div> <div>Recruitment Start:</div> <div>GIT Start:</div> <div>SS Train End:</div> <div>DC End:</div>		
Other Project Team Members	Stephanie Chardoul - UM Principal Investigator Vanessa Clarke Project Assistant Karl Dinkelmann Blaise Systems and Programming Lead Jude Perillo Blaise programmer Jim Rodgers MSMS Lead Pam Swanson MSMS programmer Bill Loker Financial/Business Analyst Ian Ogden Technical Project Manager Jennie Williams Data Manager (75%) Ed Green Data Manager (25%) Wen Chang Statistician (lead DMSS tasks) David Bolt Help Desk		
Other Project Name			
Sample Mgmt System	MSMS; Other (RCLS - loading cases in ST)		
Data Col Tool	Blaise 5		
Hardware	Laptop; [UM cell] Phone		

DE Software	NA
QC Recording Tool	NA
Incentive	Yes, R
Administration	SRO Group
Payment Type	Cash, prepaid (TBD)
Payment Method	Check through other system (MSMS); Other (Venmo, Paypal - via Concourse and Tango (Business Office))

Report Period	Mar, 2025 (FFCWS)	Initiation
Risk Level	On Track	
Monthly Updates	March 2025 RG has been meeting regularly with key staff at Princeton discussing schedule, design decisions etc. An initial project review/kick-off was held on 3/21, followed by a first meeting of the tech team. RG and Veronica have also met to discuss a staffing plan.	

Special Issues		
Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):	37,889.01
	Est Cost at Completion (E\$AC):	4,460,555.94
	Total Budget:	4,535,257.00
	Variance (Total Budget minus- E\$AC):	74,701.06
	Reason for Variance:	Team members will be reviewing projections - this could result in some changes. Some tasks will be completed by staff in a different job title than used for the initial costing. This could account for the small variance.

Projections as of Apr 17, 2025	Dollars Projected for Month:	24,943.34
	Actual Dollars Used:	12,607.58
	Variance (Projected minus Actual):	12,335.76
	Reason for Variance:	Initial projections had hours evenly distributed across months. Projections have been refined recently to more accurately reflect effort by month.

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

Other Measures	
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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#: HUM00154638	Period of Approval: 1/17/2025 -1/16/2026	
Project Team	Project Lead: Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Taghreid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 600 interviews with recently identified Arab Americans aged 65 or older residing in Southeast Michigan and 330 interviews with Social Relations sample members aged 65 or older. The Arab American sample will be selected based on an in-person household screening. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements. Social Relations respondents will only complete the cognitive interview. An informant interview will also be conducted for all sample members. Interviews will be conducted in English or Arabic.		
SRO Project Period	05/2019 - 03/2023		
Data Col Period	05/2023 - 03/2024		
Security Plan	No		
Milestones	<div> <div> Pre Production Start: 12/01/2022 Pretest End: Staffing Complete: 04/10/2023 SS Train Start: 05/18/2023 DC Start: 05/30/2023 </div> <div> Pretest Start: Recruitment Start: 02/01/2023 GIT Start: 05/16/2023 SS Train End: 05/25/2023 DC End: 03/15/2025 </div> </div>		
Other Project Team Members	Taghreid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall		
Other Project Name	Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan)		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	DRI-CARI; Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	SRO Group		
Payment Type	Check, post (\$25 Informant, \$100 R, \$200 R (end game for panel)); Cash, post (\$25 Informant, \$100 R, \$200 R (end game for panel)); Other (\$2 screener incentive)		
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office		

Report Period	Mar, 2025 (Health and Well Being in SE MI)		Implementing
Risk Level	On Track		
Monthly Updates	D-AMP/Healthy Brain interviewing was concluded on March 16 (March 15, with one final case on March 16). We exceeded revised goals for each sample type (new sample, convenience and panel), and ended with a close-to 80% response rate on Informant interviews. In March, interviewers focused primarily on Informant interviews, but also completed some main panel cases. There were a number of suspended interviews that are being accepted as partials per the PIs request. We are issuing R payment checks for all partial interviews.		

The study ended with 983 main respondent completes, and 782 informant interviews. This exceeds the total desired for the project as a whole

We are still anticipating an underrun on D-AMP and Healthy Brain, but perhaps not as large as the current cost report indicates. We will be adding SSA help for logging and reconciliation (which is proving to be more difficult than anticipated), as well as supplies cleanup and disposition. While we have added hours for weighting staff, we know the weights are going to prove to be difficult given that the study design changed several times during production, and there is scant documentation on the panel cases. The underrun stems from the convenience sample, and the late release of more recent panel cases. Both came in at HPIs that were far lower than anticipated.

Special Issues

Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):	3,595,418.85
	Est Cost at Completion (E\$AC):	3,725,965.31
	Total Budget:	3,758,127.00
	Variance (Total Budget minus- E\$AC):	32,161.69
	Reason for Variance:	HPI for the convenience sample and for the D-AMP CS panel came in far lower than anticipated, leading to the underrun. The convenience sample was budgeted at 7.5 hours per household, but came in at 4 HPI. The D-AMP CS 2020 panel came in at around 6.8 HPI versus 18 HPI for the historic panel. We do anticipate a smaller underrun. We learned that the logging reconciliation task is taking longer than anticipated and added projections after cost reports were finalized.
Projections as of Apr 17, 2025	Dollars Projected for Month:	57,729.45
	Actual Dollars Used:	49,590.66
	Variance (Projected minus Actual):	8,138.79
	Reason for Variance:	Interviewer travel and respondent payments were lower than anticipated. Most of the final work in the field was completed by phone, leading to lower travel costs and a shifting of R payments from cash to check requests (which take longer to process).

Measures		Units at Complete	RR	HPI
	Current Goal:	200/400/200 design		9.0 new/ 9.0 panel
	Goal at Completion:	200/400/200 design		
	Current Actual:	249/426/308	39% scmr; 55% main	8.3 new/18 panel
	Estimate at Complete:			
	Variance:			

Other Measures

Actuals are as of 3/20/2025. The budgeted HPI for the convenience sample was 6.5 HPI plus 1 HPI for the informant. We are running at 4.0 HPI (main plus informant) for the convenience sample. The new D-AMP CS 2020 Panel is running at 6.8 HPI vs. 18 HPI for the historical panel.

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 Investigator/Clients	Kristine Ajrouch (Research Center for Group Dynamics, ISR) Toni Antonucchi (Life Course Development Program, SRC) Laura Zahodne (Life Course Development Program, SRC)		
Funding Agency			
IRB	HUM#: HUM00199306		Period of Approval: 8/8/2024 - 8/7/2025
Project Team	Project Lead: Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Taghreid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	The participants in this study will be Arab American men and women aged 65+ as well as non-Arab men and women aged 65+ from the Social Relations Study (SRS) (HUM00187453) living in the metropolitan Detroit area who have participated in the Detroit Aging and Memory Project (D-AMP) (HUM00154638). The proposed study is in response to PAR-19-070 and will test links between sociocultural experiences, brain aging, and cognitive health. The following specific aims will be accomplished by obtaining structural MRI and blood-based AD biomarker data in the Detroit-Aging and Memory Project (D-AMP). This funded parent study obtains high-quality AD/AD phenotypes and genetic data on those aged 65+ from a representative sample of 600 Arab Americans, as well as panel participants (N=298) from the Social Relations Study (SRS), to compare to non-Arab Whites in the same geographic area.		
SRO Project Period	07/2024 - 05/2025		
Data Col Period	07/2024 - 05/2025		
Security Plan	NA		
Milestones	Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End:		
Other Project Team Members	In addition: Tim Prand, Mouna Mana, AB Fuqua Smith, Jeff Smith, Ashwin Dey, Kelly Lieske, Valyn Dall, Andria Goedert, Megan Hromco		
Other Project Name			
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone		
DE Software	Other (Weblog)		
QC Recording Tool	DRI-CARI; Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	SRO Group		
Payment Type	Check, post (\$25 Informant, \$100 R, \$200 R (end game for panel)); Cash, post (\$25 Informant, \$100 R, \$200 R (end game for panel))		
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox)		

Report Period	Mar, 2025 (Healthy Brain Project)		Implementing
Risk Level	On Track		
Monthly Updates	The D-AMP/Healthy Brain data collection period was extended to run to March 15, and completed interviewing on March 16. Interviewing ended and the interviewing team exceeded revised goals in all sample types (new sample, convenience sample, panel sample). Interviewer work in March focused on completing partial interviews and		

informant interviews. The SRO project team began closing activities.

We are projecting an underrun on Healthy Brain. The HPI for the convenience sample came in at 4.0 versus 7.5 budgeted. In addition, the D-AMP CS 2020 panel (the new panel) came in at 6.8 HPI vs. 18 for the historic (and highly resistant) panel.

Special Issues

Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):	1,292,705.83
	Est Cost at Completion (E\$AC):	1,523,724.92
	Total Budget:	1,537,306.00
	Variance (Total Budget minus- E\$AC):	13,581.08
	Reason for Variance:	We are projecting an underrun on Healthy Brain. The HPI for the convenience sample came in at 4.0 versus 7.5 budgeted. In addition, the D-AMP CS 2020 panel (the new panel) came in at 6.8 HPI vs. 18 for the historic (and highly resistant) panel. This is leading to the projected underrun on Healthy Brain. The underrun will be slightly smaller than shown. The logging reconciliation task is proving to be more complicated and take longer than anticipated. We have added SSA hours to help complete logging, supplies clean out and disposition.

Projections as of Apr 17, 2025	Dollars Projected for Month:	103,571.74
	Actual Dollars Used:	76,281.55
	Variance (Projected minus Actual):	27,290.19
	Reason for Variance:	Respondent payments and interviewer travel were significantly lower than anticipated due to the majority of interviews being completed by phone and requiring check payment. We also anticipated freight costs for interviewers & TLs sending back equipment, but the majority moved to other projects or dropped off materials in person. Some of the DAWN project team were pulled to work on another project leading to lower staff hours as well.

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

Other Measures	The Healthy Brain Project does not have specific production goals. It is being used to help increase completes on D-AMP. Those completes will feed into the Healthy Brain Project increasing recruitment for Healthy Brain. Please see D-AMP for production progress.
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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: 02/25/2025 </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	Mar, 2025 (Hospitals Sharing Data)		Implementing
Risk Level	On Track		
Monthly Updates	All Survey invitations and reminder mailings have been sent as of 4/17. There were 18 invitations held back from		

mailing per the study PI and HSIP for not having named targets. SSL interviewers were able to contact these hospitals and get the names for 4 contacts. There were also 2 invitations with incorrect addresses that have been re-sent with corrected addresses. SSL interviewers are now making follow-up calls to all three survey releases. To date, there have been 125 completed surveys, just under a 20% response rate. We are still aiming for a 50% response rate and are considering implementing an additional reminder mailing with a non-monetary incentive.

Special Issues	We are currently considering an additional reminder mailing for incomplete surveys that include a pen or other non-monetary incentive to increase the response rate.		
Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):		65,384.23
	Est Cost at Completion (E\$AC):		177,871.45
	Total Budget:		203,554.00
	Variance (Total Budget minus- E\$AC):		25,682.55
	Reason for Variance:	SSL interviewer work began during the later stages of March, not all interviewer hours charged in March have "hit" in the cost report as of now	

Projections as of Apr 17, 2025	Dollars Projected for Month:		38,786.17
	Actual Dollars Used:		34,354.67
	Variance (Projected minus Actual):		4,431.50
	Reason for Variance:	Not all March hours have hit as of now, so budget shows an underrun	

Measures		Units at Complete	RR	HPI
	Current Goal:	316	50%	
	Goal at Completion:	316	50%	
	Current Actual:	125	20%	
	Estimate at Complete:	316		
	Variance:			

Other Measures

Project Name	(HRS 2022 Panel & Baselines) Health and Retirement Study 2022 Main Interviews (Some Concerns)		
Project Mode	Primary: Mixed Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	Direct Budget: 13,982,815.00	Indirect Budget: 5,033,815.00	Total Budget: 19,016,630.00
Principal Investigator/Clients	David Weir (ISR-SRC)		
Funding Agency			
IRB	HUM#: HUM000611128	Period of Approval: 6/7/2023-6/6/2024	
Project Team	Project Lead: Evanthia Leissou Budget Analyst: David Kellermeyer Production Manager: Andrea Sims Senior Project Advisor: Nicole G Kirgis Production Manager 1: Jennifer C Arrieta Production Manager 2: Theresa Camelo		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.		
SRO Project Period	01/2021 - 12/2023		
Data Col Period	03/2022 - 06/2025		
Security Plan	NA		
Milestones	<div> Pre Production Start: 01/01/2021 Pretest End: 11/23/2021 Staffing Complete: 01/15/2022 SS Train Start: 02/23/2022 DC Start: 03/07/2022 </div> <div> Pretest Start: 11/01/2021 Recruitment Start: 08/01/2021 GIT Start: 02/21/2021 SS Train End: 03/03/2022 DC End: 07/26/2025 </div>		
Other Project Team Members	Derek Dubuque (Production Manager), Alex Warju (Production Manager), Milagros Hierro (Production Manager), Andrew Hupp (Project Manager), Gary Hein (Project Manager), Erin McSpadden (Project Manager), Daniah Buageila (Project Manager), Janet McBride (Project Assistant), Paul Burton (Stats/Sampling), Vanessa Clarke (Project Assistant), Jeannie Baker (Project Manager), Melissa Luker (Project Assistant), Anthony Romanowski (Project Manager), Kristen Cross (Project Assistant), Cindy Huang (Budget Analyst), Andria Goedert (Project Assistant), Edwina Yang (Project Assistant) Tech Team: Karl Dinkelmann, Jeff Smith, Jim Rodgers, Laura Yoder, Marsha Skoman, Ashwin Dey, Pam Swanson, David Bolt, Deb Wilson, Jennie Williams, Rose Zybdel, Stephanie Windisch, Holly Ackerman, Shane Empie, Kelly Chatain, Brianna Sabol Coding Lead: Carolyn Vieira-Martinez		
Other Project Name	HRS 2022 Main lws		
Sample Mgmt System	SurveyTrak; MSMS		
Data Col Tool	Blaise 5; SAQ		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Blaise 5 Coding Application); External vendor (DataForce)		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	NA		
Payment Type	Check, prepaid (\$80 (Panel)); Check, post (\$50 (WBD), \$20 (SSA)); Cash, post (\$20 (SAQ), \$100 (Baselines))		
Payment Method	Check through STrak RPay System; Check through other system (Rpay system set up for MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (Rpay system set up for MSMS); Imprest Cash Fund from ISR Business Office (Rpay system set up for MSMS)		

Report Period	Mar, 2025 (HRS 2022 Panel & Baselines)			Implementing
Risk Level	Some Concerns			
Monthly Updates	<p>1. The project team has been working on baseline production monitoring, sample management, logging, weekly mailings and scanning(SSA and SAQ), payment and letter request processing, and implementing the baseline endgame protocols.</p> <p>2. Regular data manager tasks to support production activities and MSMS task rules updates programmed for web endgame protocol.</p> <p>3. Interviewers worked exceeded hours and baseline interviews during the month.</p> <p>4. Field Strategies:</p> <p>-Priority sample: to date,12,098 cases have been flagged priority. To date, 3,199 (26%) have completed interviews.</p> <p>-Endgame sample:10,686 cases were mailed the endgame letter. To date, 1,312 (12%) completed interviews.</p> <p>-Web baseline: We are offering a Web Baseline interview to a subset of eligible respondents. Excluding Enhanced Face to Face cases, cases are selected for the offer based on three scenarios:</p> <p>a.Cases where one spouse/partner has completed the 2022 interview (FTF/TEL) and the second partner meets the criteria for endgame.</p> <p>b.Cases where no one in the household has completed the 2022 interview and one or both cases meet the criteria for endgame.</p> <p>c.50% of Web screened eligible cases that have not been attempted in person or by telephone.</p> <p>This protocol started on March 6. As of 4/16/25, 29 Rs (5.9%) sent an invite completed the web survey.</p> <p> *The "measures" table reflects Panel and Baseline combined as of 2/15/2025. Breakdown of Panel and Baseline counts and rates in Other Measures Field.</p>			
Special Issues	Currently estimating a shortfall of ~156 EGenX baseline interviews based on limiting production to budgeted interview hours.			
Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):			18,089,868.41
	Est Cost at Completion (E\$AC):			18,089,786.81
	Total Budget:			19,016,630.00
	Variance (Total Budget minus- E\$AC):			926,843.19
	Reason for Variance:			This budget is for the Panel sample but the monthly updates and milestones include baseline iws. The New Cohort Budget is under the HRS 2022 Screening MPR.
Projections as of Apr 17, 2025	Dollars Projected for Month:			-652.80
	Actual Dollars Used:			141.55
	Variance (Projected minus Actual):			-794.35
	Reason for Variance:			Minimal Variance
Measures		Units at Complete	RR	HPI
	Current Goal:	20,454	51%	12.7
	Goal at Completion:	22,215	44%	8.3
	Current Actual:	20,537	51%	12.7
	Estimate at Complete:	20,912	42%	9.8
	Variance:	1,303	2%	1.5
Other Measures	<p>Baselines:</p> <p>-EGenX generated from screener: Goal: 4,003 iws; Current: 3,3552 iws from 12,529 lines spawned; RR: 28.6%.</p> <p>-MOC: Goal: 2,000 iws; Final: 2,047 iws (36.4% RR). End date 11/15/2024</p> <p>-2019 EGenX baselines: Goal: 468 iws, Final: 497 iws (74.4% RR). End date 5/29/2024</p> <p>Panel: Revised RR Goal: 68% (original goal 74%), Final: 14,441 iws (68% RR). End date 9/2/23</p>			

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: 15,740,049.00	Indirect Budget: 5,666,419.00	Total Budget: 21,406,468.00
Principal Investigator/Clients	David Weir (ISR-SRC)		
Funding Agency			
IRB	HUM#: HUM000611128		Period of Approval: 6/7/2023-6/6/2024
Project Team	Project Lead: Evanthia Leissou		
	Budget Analyst: David Kellermeyer		
	Production Manager: Andrea Sims		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Derek Dubuque		
	Production Manager 2: Jennifer C Arrieta		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.		
SRO Project Period	05/2023 - 08/2025		
Data Col Period	05/2024 - 05/2025		
Security Plan	NA		
Milestones	Pre Production Start: 05/15/2023 Pretest Start: 01/29/2024 Pretest End: 02/18/2024 Recruitment Start: 12/19/2023 Staffing Complete: 03/15/2024 GIT Start: 04/22/2024 SS Train Start: 04/23/2024 SS Train End: 04/29/2024 DC Start: 05/13/2024 DC End: 07/05/2025		
Other Project Team Members	Alex Warju (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), Chelsea Graham (Project Manager), Melissa Luker (Project Assistant), Anthony Romanowski (Project Manager), Edwina Yang (Project Assistant), Andria Shimoura Goedert (Project Assistant), Kirsten LoDuca (Project Assistant) Tech Team: Karl Dinkelmann, Jeff Smith, Jim Rodgers, Laura Yoder, Marsha Skoman, Ashwin Dey, Pam Swanson, David Bolt, Deb Wilson, Jennie Williams, Rose Zybdel, Stephanie Windisch, Holly Ackerman, Shane Empie, Kelly Chatain, Brianna Sabol, 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 (SSA), \$100/\$150 Endgame); Cash, post (\$20 (SAQ), \$100/\$150 Endgame)		
Payment Method	Check through STRak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office		
=====			
Report Period	Mar, 2025 (HRS 2024)		Implementing
Risk Level	Some Concerns		
Monthly Updates	-HRS 2024 activities continued with cost projections, technical specifications, technical development, testing,		

payment processing, letter request processing, coding, and logging activities.
 -Endgame protocol and respondent materials were approved by the IRB. Data manager SAS code and technical systems (STrak and MSMS) were being programmed the 2024 endgame protocol.
 -One additional interviewer was trained remotely on MSMS to work on web panel non-response follow up.
 -Interviewers exceeded hours projections, were above the interview goal every week in March. HPI was slightly higher than projected for three weeks and lower than projected for one week. In addition, 536 web self interviews were completed during the month.

-Field Strategies:
 -Prioritization based on Influence Measure (IM) was implemented on January 31.
 -Mode switch was approved by PIs: Mode switch to TEL for eFTF households where at least 1 R in the household has reached 6+ attempts.
 Upcoming Field Strategy:
 -Endgame protocol

Measures in table below are as of 4/12/25 (week 48).

Special Issues

Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):	15,767,854.10
	Est Cost at Completion (E\$AC):	19,929,537.89
	Total Budget:	21,406,468.00
	Variance (Total Budget minus- E\$AC):	1,476,930.11
	Reason for Variance:	Projection updates have not been finalized yet. We will send an update once they are ready. We are also working on a cost scenario assuming additional interviewer hours that would allow us to extend the field period by 6 weeks.

Projections as of Apr 17, 2025	Dollars Projected for Month:	1,245,683.81
	Actual Dollars Used:	1,133,636.15
	Variance (Projected minus Actual):	112,047.66
	Reason for Variance:	Variance is primarily due to non-salary categories of Travel, Respondent Incentives, and Service of Others. All of these accounts hit for less than projected in March. Future projections have been adjusted.

Measures		Units at Complete	RR	HPI
	Current Goal:	10,423	45.8%	9.5
	Goal at Completion:	15,793*	70%*	9.3
	Current Actual:	12,334	54.2%	9.5
	Estimate at Complete:	13,821**	61%**	9.9**
	Variance:	-1,971	9%	-0.6

Other Measures
 *Budgeted goal RR: 70% RR
 **Based on when we expect to run out of budgeted hours

Project Name	(HRS2022-Screening) HRS 2022 - Screening (Some Concerns)		
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 21,264,149.00	Indirect Budget: 7,655,093.00	Total Budget: 28,919,242.00
Principal Investigator/Clients	David Weir (SRC) Helen Levy (SRC) Ken Langa (SRC)		
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Evanthia Leissou Budget Analyst: Richard Warren Krause Production Manager: Senior Project Advisor: Nicole G Kirgis Production Manager 1: Andrew L Hupp Production Manager 2: Theresa Camelo		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample.		
SRO Project Period	02/2021 - 08/2025		
Data Col Period	03/2022 - 07/2025		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: 04/19/2022 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	SurveyTrak; MSMS; Other ((Blaise) Case Management App (CMA))		
Data Col Tool	Blaise 5		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Blaise 5 web instrument); N/A		
QC Recording Tool	Camtasia; N/A		
Incentive	Yes, R; Yes, INF		
Administration	SRO Group		
Payment Type	Check, post; Cash, prepaid (\$2); Cash, post		
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office		

Report Period	Mar, 2025 (HRS2022-Screening)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Screening continues at a steady pace. We have been largely above projections in 2025. 01/05/25 - 04/19/25 Hours projected: 16,589 Hours worked: 18,386 (111%) Screening goal: 4,696 Screening actual: 6,498 in-person (138%) + 1,110 web		

We have released 24,458 cases to the endgame protocol. 1,933 cases (7.9%) of cases have completed a screener. 206 cases (10.7%) completed via the web, and 1,727 (89.3%) of cases completed in-person. Flagging of endgame cases has continues.

Special Issues				
Cost as of Apr 10, 2025	Total Cost to Date (direct + indirect):			32,412,818.08
	Est Cost at Completion (E\$AC):			34,985,744.54
	Total Budget:			28,919,242.00
	Variance (Total Budget minus- E\$AC):			-6,066,502.54
	Reason for Variance:			Projections have been entered through July 2025 (projection of when we would meet the baseline production goal).
Projections as of Apr 10, 2025	Dollars Projected for Month:			696,351.95
	Actual Dollars Used:			718,311.86
	Variance (Projected minus Actual):			-21,959.91
	Reason for Variance:			Variance largely due to more hours and travel than budgeted.
Measures		Units at Complete	RR	HPI
	Current Goal:	7,017/3,645 HHs	73%	3.0
	Goal at Completion:			
	Current Actual:	7,874/3,890	51.0%	2.88
	Estimate at Complete:			
	Variance:			
Other Measures				

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

Report Period	Mar, 2025 (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 Apr 17, 2025	Total Cost to Date (direct + indirect):	262,647.75		
	Est Cost at Completion (E\$AC):	262,341.75		
	Total Budget:	505,359.00		
	Variance (Total Budget minus- E\$AC):	243,017.25		
	Reason for Variance:	Staffing for reminder calling did not meet original projections and lower response rates than anticipated are resulting in lower costs across the project.		
Projections as of Apr 17, 2025	Dollars Projected for Month:	-1,088.00		
	Actual Dollars Used:	-816.00		
	Variance (Projected minus Actual):	-272.00		
	Reason for Variance:	Fewer checks voided.		
Measures		Units at Complete	RR	HPI
	Current Goal:	2063	54%	N/A
	Goal at Completion:	2063	54%	N/A
	Current Actual:	671	17%	N/A
	Estimate at Complete:	671	17%	N/A
	Variance:	1392	37%	N/A
Other Measures	N/A			

Project Name	(LHMS 2023 Spring) Life History Mail Study Spring 2023 (On Track)		
Project Mode	Primary: Mail	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 293,540.00	Indirect Budget: 164,382.00	Total Budget: 457,922.00
Principal	David Weir (SRC)		
Investigator/Clients	Jaqui Smith (SRC)		
Funding Agency	NIH		
IRB	HUM#: HUM00106904		Period of Approval: 11/4/2022-11/3/2023
Project Team	Project Lead: Gary Hein Budget Analyst: Cindy Tsao Production Manager: William Keating Senior Project Advisor: Evanthia Leissou Production Manager 1: Production Manager 2: William Keating		
Proposal #	no data		
Description	<p>The HRS Life History Mail Survey (LHMS) is part of the Health and Retirement Study. The goal of LHMS is to collect retrospective life histories of HRS participants to address multidisciplinary need for information about events, residential location, and education over the entire life course. Information like this allows researchers to understand how individuals' pasts shape their health and economic situations today.</p> <p>A paper questionnaire will be mailed to a sample of approximately 2,288 HRS Respondents. From this sample, approximately 1,242 completed surveys are expected (54% response rate). For the reminder protocol, 495 respondents have been designated to receive a reminder by postcard. The remaining 1,793 respondents will receive reminders by phone to complete the questionnaire. When a respondent is reached by phone, SRO will attempt to complete the 60-minute interview by telephone. Thank you postcards will be mailed to respondents who return a completed questionnaire.</p>		
SRO Project Period	04/2023 - 12/2023		
Data Col Period	06/2023 - 09/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 04/01/2023 Pretest End: Staffing Complete: SS Train Start: 07/11/2023 DC Start: 06/20/2023 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: 07/11/2023 DC End: 09/26/2023 </div> </div>		
Other Project Team Members	Gary Hein: Project Lead Cindy Tsao: Budget Analyst Vanessa Clarke: Project Assistant Carolyn Viera Martinez: Coding Lead		
Other Project Name	LHMS Spring		
Sample Mgmt System	SMS		
Data Col Tool	SAQ; Other (Blaise SMS)		
Hardware	Desktop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Check, prepaid (\$25)		
Payment Method	Check through STRak RPay System		
=====			
Report Period	Mar, 2025 (LHMS 2023 Spring)		Implementing
Risk Level	On Track		
Monthly Updates	February Activities and Notable Events for Spring and Fall:		

- 1 - Monthly budget projection meeting with financial analyst
- 2 - LHMS update meeting with HRS staff
- 3 - Coding by SRO Staff

Special Issues	Finance wants to bill current/future fall activities to the spring shortcode			
Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):	236,004.20		
	Est Cost at Completion (E\$AC):	268,597.44		
	Total Budget:	457,922.00		
	Variance (Total Budget minus- E\$AC):	189,324.56		
	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 Apr 17, 2025	Dollars Projected for Month:	645.20		
	Actual Dollars Used:	1,508.55		
	Variance (Projected minus Actual):	-863.35		
	Reason for Variance:	Staff coding hours slightly 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			

Project Name	(MI CReSS (Year 3 & 4 & 5)) Michigan COVID-19 Recovery Surveillance Cohort Study (On Track)												
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2										
Project Type	Sponsored Projects												
Budget	Direct Budget: 200,023.00	Indirect Budget: 52,005.00	Total Budget: 252,028.00										
Principal Investigator/Clients	Nancy Fleischer (U-M School of Public Health (SPH))												
Funding Agency	MDHHS - Releases 1 - 8												
IRB	HUM#: HUM00234617	Period of Approval: 6/15/2023-6/14/2028											
Project Team	Project Lead: Timothy Prand												
	Budget Analyst: William Lokers												
	Production Manager: Lisa J Carn												
	Senior Project Advisor: Nicole G Kirgis												
	Production Manager 1: Narine Verdiyan												
	Production Manager 2:												
Proposal #	no data												
Description	<p>MI CReSS is a partnership between the University of Michigan School of Public Health (SPH) and the Michigan Department of Health and Human Services. It is a public health surveillance study to learn about Michiganders' experiences with COVID-19 using a representative sample of confirmed cases within the state. Using survey data, they plan to document sociodemographic inequities in COVID-19 testing, treatment, and recovery.</p> <p>SRO's involvement includes the administration of a Follow-up survey for respondents that completed a Baseline survey with the SPH team. Based on the sample information provided, we will be re-contacting approximately 3,995 respondents who have already completed (or are estimated) to complete the Baseline survey to administer the Follow-up survey.</p> <p>The Follow-up survey is estimated to be 45 minutes in length, and Respondents will be encouraged to complete the survey by web. However, SRO Interviewers will contact non-responders and conduct the interview over the telephone if the Respondents do not want to complete the survey on the web.</p> <p>HUM00181068 - Year 3 IRB Exempt - Budget:\$841,375 Total used:\$649,836 HUM00234617 - Year 4 - IRB approved - Budget:\$477,681 (\$998,480 / 822,863.98 used) Year 5 - IRB approved - Budget: \$252,028</p>												
SRO Project Period	08/2021 - 09/2023												
Data Col Period	01/2022 - 07/2023												
Security Plan	NA												
Milestones	<table> <tr> <td>Pre Production Start:</td><td>Pretest Start:</td></tr> <tr> <td>Pretest End:</td><td>Recruitment Start: 06/01/2023</td></tr> <tr> <td>Staffing Complete:</td><td>GIT Start:</td></tr> <tr> <td>SS Train Start: 07/28/2023</td><td>SS Train End: 07/29/2023</td></tr> <tr> <td>DC Start: 09/14/2023</td><td>DC End: 02/18/2025</td></tr> </table>			Pre Production Start:	Pretest Start:	Pretest End:	Recruitment Start: 06/01/2023	Staffing Complete:	GIT Start:	SS Train Start: 07/28/2023	SS Train End: 07/29/2023	DC Start: 09/14/2023	DC End: 02/18/2025
Pre Production Start:	Pretest Start:												
Pretest End:	Recruitment Start: 06/01/2023												
Staffing Complete:	GIT Start:												
SS Train Start: 07/28/2023	SS Train End: 07/29/2023												
DC Start: 09/14/2023	DC End: 02/18/2025												
Other Project Team Members	Bill Lokers: Financial Analyst Megan Hromco: Production Assistant Hueichun Peng: Technical Lead / WSMS db Programmer Peter Sparks: CAI Programmer (Blaise 5) Cheng Zhou: Web Component, ADT, Reports LihShwu Ke: DBA Architecture & Data Security Sarah Broumand: Data Manager Deb Wilson: Help Desk												
Other Project Name													
Sample Mgmt System	Web SMS												
Data Col Tool	Blaise 5												
Hardware	Laptop; Desktop												
DE Software	NA												
QC Recording Tool	NA												
Incentive	Yes, R												
Administration	SRO Group												
Payment Type	Other (HSIP VISA Gift Card)												

Payment Method	NA			

Report Period	Mar, 2025 (MI CReSS (Year 3 & 4 & 5))			Closing
Risk Level	On Track			
Monthly Updates	Funding for this project was cancelled as of March 31, 2025 F074948 - MI CRESS Final Cost - \$130,566.81 Final Report and data deliverables provided on April 17, 2025.			
Special Issues				
Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):			130,165.08
	Est Cost at Completion (E\$AC):			130,165.08
	Total Budget:			252,028.00
	Variance (Total Budget minus- E\$AC):			121,862.92
	Reason for Variance:			
Projections as of Apr 17, 2025	Dollars Projected for Month:			7,805.86
	Actual Dollars Used:			4,065.69
	Variance (Projected minus Actual):			3,740.17
	Reason for Variance:			
Measures		Units at Complete	RR	HPI
	Current Goal:	3652	80	6
	Goal at Completion:	3652	80	6
	Current Actual:	3652	77.91	11.2
	Estimate at Complete:	3652	77.91	11.2
	Variance:			
Other Measures				

Project Name	(MI CReSS CS) Michigan COVID-19 Recovery Surveillance Study Community Survey (Attention!)		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 974,804.00	Indirect Budget: 253,450.00	Total Budget: 1,228,254.00
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	Project Lead: Timothy Prand		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager: Lisa J Carn		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1:		
	Production Manager 2:		
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> Pre Production Start: 12/17/2024 Pretest End: Staffing Complete: 12/18/2024 SS Train Start: 03/26/2025 DC Start: 04/15/2025 </div> <div> Pretest Start: Recruitment Start: 11/01/2024 GIT Start: SS Train End: 03/27/2025 DC End: 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	Mar, 2025 (MI CReSS CS)			Initiation
Risk Level	Attention!			
Monthly Updates	As of March 31, 2025 funding for this project was cancelled. F075260 - Community Survey Finalized budget through 3/31/2025 - \$194,815.39 IWER Training had completed on 3/27 We were finalizing Blaise WSMS testing had completed Stored in Tim's office until September 2025. If no update, it will all be disposed of. Consents and Resource pages have been printed Envelopes ordered			
Special Issues				
Cost as of	Total Cost to Date (direct + indirect):			0.00
	Est Cost at Completion (E\$AC):			0.00
	Total Budget:			1,228,254.00
	Variance (Total Budget minus- E\$AC):			0.00
	Reason for Variance:			
Projections as of	Dollars Projected for Month:			0.00
	Actual Dollars Used:			0.00
	Variance (Projected minus Actual):			0.00
	Reason for Variance:			
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027 (On Track)												
Project Mode	Primary: Class SAQ Total of Modes: 1												
Project Type	Sponsored Projects												
Budget	Direct Budget: 6,267,988.00	Indirect Budget: 3,510,072.00	Total Budget: 9,778,060.00										
Principal Investigator/Clients	Richard Miech (SRC)												
Funding Agency	National Institute on Drug Abuse, one of the National Institutes of Health.												
IRB	HUM#: 00217920	Period of Approval: from 7/20/22 No CR											
Project Team	Project Lead: Rebecca Gatward Budget Analyst: Dean E Stevens Production Manager: Margaret Lavanger Senior Project Advisor: Shonda R Kruger-Ndiaye Production Manager 1: Production Manager 2:												
Proposal #	no data												
Description	<p>Since 1975 the MTF survey has measured drug and alcohol use and related attitudes among adolescent students nationwide. A nationally representative sample of survey participants report their drug use behaviors across three time periods: lifetime, past year, and past month. The survey is funded by the NIDA, a component of the National Institutes of Health (NIH), and conducted by the University of Michigan.</p> <p>It is based on two interconnected series of surveys using nationally representative samples:</p> <p>(a) self-administered annual in-school surveys of 8th, 10th, and 12th graders (~45,000) in 400 schools. Proctors (SRO interviewers) coordinate and administer the data collection in schools (the majority are conducted FTF however, the option is available for the survey to be conducted without the proctor visiting the school).</p> <p>(b) panels of high school graduates aged 19-30, 35, 40,45, 50, 55, and 60 (now primarily surveyed by web). Panel members aged 19-30 are invited to participate every other year/asked to complete a web survey and the older sample members are sent questionnaires (mail and web) at five-year interval. The MTF panel study has three parts - early in the year a newsletter is mailed to panel members. If the newsletter is returned (undelivered) locating effort targets these panel members and others who have not participated for X years. The web panel launches (web) in spring and in around June a telephone non-response effort begins for those invited to participate. The panel members are recruited from the 12th graders who participate in the base year study.</p> <p>Press releases and published results can be found here.. http://www.monitoringthefuture.org/</p>												
SRO Project Period	04/2022 - 03/2027												
Data Col Period	04/2022 - 03/2027												
Security Plan	Yes												
Milestones	<table border="0"> <tr> <td>Pre Production Start:</td><td>Pretest Start:</td></tr> <tr> <td>Pretest End:</td><td>Recruitment Start:</td></tr> <tr> <td>Staffing Complete:</td><td>GIT Start:</td></tr> <tr> <td>SS Train Start:</td><td>SS Train End:</td></tr> <tr> <td>DC Start:</td><td>DC End:</td></tr> </table>			Pre Production Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Complete:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
Pre Production Start:	Pretest Start:												
Pretest End:	Recruitment Start:												
Staffing Complete:	GIT Start:												
SS Train Start:	SS Train End:												
DC Start:	DC End:												
Other Project Team Members	Hueichun Peng Technical Lead (WebSMS and Qualtrics programmer) Ed Green (+Brad Goodwin) Data Management Ashwin Dey SurveyTrak, WebTrak and MTF specific Apps. Programmer Brendon Carroll Help Desk/Tablet support												
Other Project Name													
Sample Mgmt System	SurveyTrak; Web SMS												
Data Col Tool	Other (Qualtrics)												
Hardware	Laptop; Tablet; [UM cell] Phone												
DE Software	Other (Qualtrics)												
QC Recording Tool	N/A												
Incentive	Yes, Other (Honorarium paid to school by MTF Research staff)												
Administration	ISR Group												
Payment Type	NA												
Payment Method	Check through other system												

Report Period	Mar, 2025 (MTF Base Year 2022_27)	Implementing
Risk Level	On Track	
Monthly Updates	<p>March 2025</p> <p>As of today (4/17), surveys have been conducted at 161 schools. All but three have been proctored in-person. A further 96 school surveys have been scheduled to take place between today and 6/9. Student response rate is comparable with last year, at 83% with 12,501 students have completed the survey.</p> <p>Average hours to complete a school survey is currently 26.3 (21 hours in 2024).</p>	

Special Issues		
Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):	3,689,267.36
	Est Cost at Completion (E\$AC):	6,976,077.91
	Total Budget:	9,778,060.00
	Variance (Total Budget minus- E\$AC):	2,801,982.09
	Reason for Variance:	<p>Projections for Funding period 2022 – 2027 (latest client report has been uploaded to MPR)</p> <p>Current projections result in an under spend for the five year grant period. The projected costs are based on completion of 325 schools in years 2024 – 2027 (we were projecting costs for 400 schools) and all in-person. Illume charges have been removed from projections from 2024 onwards. A portion of the hours for work involved in transitioning MTF surveys to Qualtrics are being charged to the Illume recharge account.</p> <p>Primary reason for the under spend and plans for SRO funding: Projections for the five year period are based on current scope of work and the adapted protocol (introduced in 2021). The budget prepared for the proposal was based on the pre-pandemic design. The adapted protocol brings savings in the following categories: interviewer hours, travel, shipping and staff time (specifically hours required for loading and preparing tablets for shipping). For the past few years the number of schools recruited and passed to SRO has been lower than the number used for this budget (n=390).</p> <p>In response, MTF (SRC) have reduced our funding for the first two years. We have received (from MTF) \$1,843,080 (Y1) and \$1,143,890 (Y2) a total reduction of \$815,581. Going forward, the current plan is to fund Year 3 and 4 based on the budgeted amount - if there is significant underspending MTF will reduce SRO's Year 5 award. SRO Finance group feels that we should continue to report/monitor using the original budgeted amount because this is not an official reduction in budget. We are keeping the client (via Nick Prieur) informed of actual and projected spend through a monthly cost report.</p>

Projections as of Apr 17, 2025	Dollars Projected for Month:	297,209.93
	Actual Dollars Used:	273,689.39
	Variance (Projected minus Actual):	23,520.54
	Reason for Variance:	All but \$2,000 of the variance are salary costs - interviewer hours were over projected (projections are based on school surveys that are scheduled for the month plus an estimate of additional schools that could be added between projecting costs and end of the month).

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

Other Measures	
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Project Name	(MTF Early Panel Pilot) Monitoring the Future: A Cohort-Sequential Panel Study of Drug Use, Ages 19-65 - Administrative Supplement #1 (8/10th Grade Panel) (On Track)												
Project Mode	Primary: Web												
Project Type	Sponsored Projects												
Budget	Direct Budget: 184,954.00	Indirect Budget: 103,575.00	Total Budget: 288,529.00										
Principal Investigator/Clients	Megan Patrick (ISR, SRC)												
Funding Agency													
IRB	HUM#: 00244359	Period of Approval:											
Project Team	Project Lead: Donnalee Ann Grey-Farquharson												
	Budget Analyst: Dean E Stevens												
	Production Manager:												
	Senior Project Advisor: Rebecca Gatward												
	Production Manager 1: Hongyu Johnson												
	Production Manager 2:												
Proposal #	no data												
Description	<p>MTF Early Panel study is a study that will survey drug use in 9th and 11th graders who were 8th and 10th graders in 2023 wave baseline recruited samples. SRO will launch the 2024 and 2025 Web survey data collections with an estimated sample size of 600 cases 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"> - Parents were mailed a letter with a link to a consent document in Qualtrics. - After receiving parental consent, students were contacted so, - Students on individual schedule, programmed in WebSMS <p>Data Collection</p> <ul style="list-style-type: none"> - Invitation email - followed by two reminders, 2 weeks apart if needed. Each student was on his/her own schedule based on when parental permission was received. <p>Plan for Future</p> <ul style="list-style-type: none"> - Two more years of data collection <table border="0"> <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 border="0"> <tr> <td>Pre Production Start:</td><td>Pretest Start:</td></tr> <tr> <td>Pretest End:</td><td>Recruitment Start:</td></tr> <tr> <td>Staffing Complete:</td><td>GIT Start:</td></tr> <tr> <td>SS Train Start:</td><td>SS Train End:</td></tr> <tr> <td>DC Start:</td><td>DC End:</td></tr> </table>			Pre Production Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Complete:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
Pre Production Start:	Pretest Start:												
Pretest End:	Recruitment Start:												
Staffing Complete:	GIT Start:												
SS Train Start:	SS Train End:												
DC Start:	DC End:												
Other Project Team Members	Rebecca Gatward (SPA), Donnalee Grey-Farquharson (Lead), Hueichun Peng, Shaowei Sun, Hongyu Johnson, Brad Goodwin, Edward Green												
Other Project Name													
Sample Mgmt System	Web SMS												
Data Col Tool	Other (Qualtrics)												
Hardware	NA												
DE Software	NA												
QC Recording Tool	NA												
Incentive	Yes, R												
Administration	ISR Group (MTF Staff)												

Payment Type	Other (Tango Card)			
Payment Method	Other (Check mailed MTF Staff)			

Report Period	Mar, 2025 (MTF Early Panel Pilot)		Implementing	
Risk Level	On Track			
Monthly Updates	The SRO management team continues to prepare for the 2025 data collection, including testing the systems and the surveys. It has been confirmed that this project will move forward.			
Special Issues				
Cost as of Mar 31, 2025	Total Cost to Date (direct + indirect):			159,529.61
	Est Cost at Completion (E\$AC):			286,998.84
	Total Budget:			288,529.00
	Variance (Total Budget minus- E\$AC):			1,530.16
	Reason for Variance:			Some staff used less hours than projected.
Projections as of Mar 31, 2025	Dollars Projected for Month:			3,140.47
	Actual Dollars Used:			2,520.86
	Variance (Projected minus Actual):			619.61
	Reason for Variance:			Some staff used less hours than projected.
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	Project Lead: Donnalee Ann Grey-Farquharson Budget Analyst: Dean E Stevens Production Manager: Senior Project Advisor: Rebecca Gatward Production Manager 1: Hongyu Johnson Production Manager 2:		
Proposal #	no data		
Description	<p>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> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Rebecca Gatward (SPA), Donnalee Grey-Farquharson (Lead), Hueichun Peng, Shaowei Sun, Hongyu Johnson, 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	Mar, 2025 (MTF Innovation Panel)		Closing

Risk Level	On Track			
Monthly Updates	The project ended on 3/31/2025. Once the adjustments are made the project will be closed/archived.			
Special Issues				
Cost as of Mar 31, 2025	Total Cost to Date (direct + indirect):	47,583.59		
	Est Cost at Completion (E\$AC):	47,583.59		
	Total Budget:	47,477.00		
	Variance (Total Budget minus- E\$AC):	-106.59		
	Reason for Variance:	We are investigating the overrun that was most likely caused from how the Indirect Costs were calculated as it is more than we had budgeted for. Adjustments will be made for April.		
Projections as of Mar 31, 2025	Dollars Projected for Month:	17,852.79		
	Actual Dollars Used:	19,854.90		
	Variance (Projected minus Actual):	-2,002.11		
	Reason for Variance:	Some staff charged more hours to close out tasks than projected. In addition, the recharge amount was higher than projections had indicated.		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027 (On Track)		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 2,496,935.00	Indirect Budget: 1,398,282.00	Total Budget: 3,895,217.00
Principal Investigator/Clients	Megan Patrick (UM-SRC)		
Funding Agency			
IRB	HUM#: 00217920		Period of Approval:
Project Team	Project Lead: Donnalee Ann Grey-Farquharson Budget Analyst: Dean E Stevens Production Manager: Lloyd Fate Hemingway Senior Project Advisor: Rebecca Gatward Production Manager 1: Production Manager 2: Hongyu Johnson		
Proposal #	no data		
Description	<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> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Rebecca Gatward (SPA), Donnalee Grey-Farquharson, Lloyd Hemingway, Dave Dybicki, Max Malholtra, Hueichun Peng, Shaowei Sun, Peter Sparks, Ashwin Dey, Hongyu Johnson, Brad Goodwin, Edward Green.		
Other Project Name	MTF		
Sample Mgmt System	Web SMS		
Data Col Tool	Other (Qualtrics)		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	ISR Group (MTF Staff)		
Payment Type	Check, prepaid; Check, post		
Payment Method	Other (MTF Staff mails check)		
<div></div>			

Report Period	Mar, 2025 (MTF Panel 2022-27)			Implementing
Risk Level	On Track			
Monthly Updates	The SRO team is in full gear - testing the system and the surveys for the 2025 data collection which will start on April 10, 2025.			
Special Issues				
Cost as of Mar 31, 2025	Total Cost to Date (direct + indirect):			2,237,810.37
	Est Cost at Completion (E\$AC):			4,111,533.18
	Total Budget:			3,895,217.00
	Variance (Total Budget minus- E\$AC):			-216,316.18
	Reason for Variance:			We are refining the NR projections. MTF staff are aware of the overrun.
Projections as of Mar 31, 2025	Dollars Projected for Month:			64,491.78
	Actual Dollars Used:			62,077.27
	Variance (Projected minus Actual):			2,414.51
	Reason for Variance:			Some staff used less hours than projected. The recharged amount was less than projected.
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(NDWS) National Dementia Workforce Study (On Track)		
Project Mode	Primary: Not Available		
Project Type	Sponsored Projects		
Budget	Direct Budget: 4,327,548.00	Indirect Budget: 2,423,425.00	Total Budget: 6,750,973.00
Principal	Donovan Maust (Michigan Medicine)		
Investigator/Clients	Joanne Spetz (University of California, San Francisco)		
	James Wagner (University of Michigan - Survey Research Center)		
Funding Agency	NIA		
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: 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		

Report Period	Mar, 2025 (NDWS)			Implementing
Risk Level	On Track			
Monthly Updates	<p>March activities:</p> <p>* We were focusing on preparing NDWS for Wave 2 data collection including 1) recruiting a larger sample of Assisted Living and Nursing Homes orgs, rostering, and interviewing their staff 2) non-response follow up with community clinicians who did not respond to Wave 1 request for interview including incentive increase and experimental treatments 3) a pilot of home care direct care workers and 4) recruiting a sample of home care agencies (unlike wave 1 Medicare-accepting home health agencies, those have been sampled from state lists and may represent a different type of home health / home care organizations).</p> <p>In supporting W2 preparation, the SRO team has been drafting survey specs, testing survey programming, reviewing protocols, reviewing study materials and respondent communication materials, and assisting with IRB submissions.</p> <p>Data collection for different components will start between mid-April 10th, and mid-June 2025 and will end by December 2025.</p> <p>In June, we are kicking off preparations for W3 (data collection starting in January 2026) which will include assisting with questionnaire design and cognitive testing.</p>			
Special Issues				
Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):	1,199,507.12		
	Est Cost at Completion (E\$AC):	6,390,767.07		
	Total Budget:	6,750,973.00		
	Variance (Total Budget minus- E\$AC):	360,205.93		
	Reason for Variance:	We are working on reducing underrun by projecting new staff to accommodate additional work expected in 2025 - 2026.		
Projections as of Apr 17, 2025	Dollars Projected for Month:	117,886.90		
	Actual Dollars Used:	87,767.87		
	Variance (Projected minus Actual):	30,119.03		
	Reason for Variance:	Underrun is mostly within DMSS and Data Ops.		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(PR-PSID) Puerto Rico Panel Study of Income Dynamics (Some Concerns)			
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 2	
Project Type	Sponsored Projects			
Budget	Direct Budget: 828,581.00	Indirect Budget: 464,004.00	Total Budget: 1,292,585.00	
Principal	Narayan Sastry (University of Michigan)			
Investigator/Clients	Elizabeth Fussel (Brown University)			
Funding Agency	NICHD, with supplemental funding being sought from NIA			
IRB	HUM#: HUM00197300		Period of Approval: 4/5/2022-3/22/24	
Project Team	Project Lead: Camila Kendall			
	Budget Analyst: Ivanna Iavorska-Em			
	Production Manager:			
	Senior Project Advisor: Stephanie A Chardoul			
	Production Manager 1: Camila Kendall			
	Production Manager 2:			
Proposal #	no data			
Description	SRO will work with the PIs and a local survey firm in Puerto Rico, Estudios Técnicos (ETI), to develop a sample frame, sample design, questionnaire and data collection protocols for both pilot data collection (in 2022) and baseline data collection (in 2023). DMSS will provide assistance with sample design and implementation, responsive design, panel maintenance issues, and creation of sample weights. SRO will update the PSID-21 Spanish instrument for use specifically in PR. SRO will assist with the preparation of training materials for Listing training, Pretest and Main Data collection and will travel to PR to be on-site for these trainings. SRO will define reports for production and quality control monitoring that will be programmed through the SurveyTrak system, and train the research team on using these reports. All data will be collected by ETI's interviewers in PR and will be encrypted and transmitted daily via SurveyTrak to a secure SRC server. SRO will also assist with data processing.			
SRO Project Period	01/2022 - 12/2023			
Data Col Period				
Security Plan	NA			
Milestones	Pre Production Start: 10/01/2021 Pretest 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			
Other Project Name				
Sample Mgmt System	SurveyTrak			
Data Col Tool	Blaise 4.8			
Hardware	Laptop			
DE Software	N/A			
QC Recording Tool	Camtasia			
Incentive	Yes, R; Yes, INF			
Administration	Other (ETI (Puerto Rican Survey Firm))			
Payment Type	Check, post (Varies by study phase); Cash, post (Varies by study phase)			
Payment Method	Other (Via ETI Systems)			

Report Period	Mar, 2025 (PR-PSID)		Implementing	
Risk Level	Some Concerns			
Monthly Updates	PIs are still planning on submitting the 2027 proposal budget in June -- budget specs expected in late April.			

Blaise instrument was loaded into CTT and testing began. ETI purchased the additional laptops needed for main data collection.

ETI provided SRO with address to test whether we could use Accurint to obtain contact information -- The batch process is not possible for PR sample because it requires a name. The manual process did not bring up many results, and the results were inaccurate.

SRO planned for cost review meeting with Pls.

Training scheduled for June 12-18.

On 4/14, Brown PI was notified that their federal funding is at imminent risk (U-M & ETI are subcontracts under Brown). The project has not received a stop work order. Pls have instructed SRO to continue working until we're notified that we're required to stop. SRO will proceed with booking travel arrangements for the training.

Special Issues	Threat to Brown funding Same as last month -- overrun and uncertainty around PCP work scope which is new to SRO.			
Cost as of	Total Cost to Date (direct + indirect):			0.00
	Est Cost at Completion (E\$AC):			0.00
	Total Budget:			1,292,585.00
	Variance (Total Budget minus- E\$AC):			0.00
	Reason for Variance: TBD			
Projections as of	Dollars Projected for Month:			0.00
	Actual Dollars Used:			0.00
	Variance (Projected minus Actual):			0.00
	Reason for Variance: TBD			
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(PSID 2025 OCU) PSID 2025 Online Contact Update (On Track)		
Project Mode	Primary: Web	Secondary: Mail	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 52,360.00	Indirect Budget: 29,326.00	Total Budget: 81,686.00
Principal	Katherine McGonagle (PSID)		
Investigator/Clients	Noura Insolera (PSID)		
Funding Agency	NSF		
IRB	HUM#: HUM00062417		Period of Approval:
Project Team	Project Lead: Camila Kendall		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	SRO will update the Blaise and MSMS specifications from 2022 and program and test a Blaise 5 web instrument and web portal with authentication that allows PSID and TAS respondents to confirm or update their contact information via an online survey. SRO will provide PSID authenticated links so that they can merge QR codes that will be embedded in a mailing sent to the respondents. SRO will also program and send the respondents up to three email reminders with an authenticated link. This project is under the PSID Core IRB.		
SRO Project Period	04/2024 - 05/2025		
Data Col Period	07/2024 - 12/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest 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	Mar, 2025 (PSID 2025 OCU)		Implementing
Risk Level	On Track		
Monthly Updates	Data Collection ended on 12/8.		

No on-going project activities until project archiving, scheduled for May.

Special Issues

Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):	76,151.04
	Est Cost at Completion (E\$AC):	77,850.49
	Total Budget:	81,686.00
	Variance (Total Budget minus- E\$AC):	3,835.51
	Reason for Variance:	Minimal on-going work. Actuals have been slightly less than projections.

Projections as of Apr 17, 2025	Dollars Projected for Month:	320.18
	Actual Dollars Used:	223.13
	Variance (Projected minus Actual):	97.05
	Reason for Variance:	Minimal on-going work until project archiving in May. Actuals slightly less than projections.

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

Other Measures

Project Name	(PSID CDS23 Phase 2) PSID Childhood Development Supplement 2023 Phase 2 (On Track)		
Project Mode	Primary: Mixed Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	Direct Budget: 1,618,383.00	Indirect Budget: 906,295.00	Total Budget: 2,524,678.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#: HUM00166316	Period of Approval:	
Project Team	Project Lead: Camila Kendall Budget Analyst: Ivanna Iavorska-Em Production Manager: Sarah Crane Senior Project Advisor: Stephanie A Chardoul Production Manager 1: Barbara Aghababian-Homburg Production Manager 2: Carolyn Vieira-Martinez		
Proposal #	no data		
Description	Primary Caregivers (PCG) with children aged 5+, who completed Phase 1 of CDS (the phone interview) will be invited to provide a saliva sample during phase 2. The SSL will assemble kit mailings that will be shipped to respondents in weekly releases. Field interviewers will follow up via phone, email, and text to encourage participation. Additionally, Field IWERs will make FTF visits to pick up saliva samples, and offer cash payments.		
SRO Project Period	06/2024 - 02/2025		
Data Col Period	09/2024 - 01/2025		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Project Lead -- Camila Kendall Field Production Management -- Sarah Crane & Barb Aghababian-Homburg SSL Production Management Lead (Assembly & Logging) -- Carolyn Vierra-Martinez SSL Production Management Support (Assembly & Logging) -- Ian Woods Project Management Support -- Xiomara Lorenzo-Guerra, Nahid Sultana Tech Lead -- Jeff Smith PDMG Tech Lead -- Ian Ogden		
Other Project Name	CDS Saliva Collection		
Sample Mgmt System	SurveyTrak		
Data Col Tool	NA		
Hardware	Laptop; [UM cell] Phone		
DE Software	NA		
QC Recording Tool	N/A		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
=====			
Report Period	Mar, 2025 (PSID CDS23 Phase 2)		Implementing
Risk Level	On Track		
Monthly Updates	<p>All interviewers were closed out of the project on 1/31. All but one TL was closed out at the end of February. All interim cases were assigned a final code in early March. Final data delivery is scheduled for June.</p> <p>PM team focused on consent follow up and WebLog data QC. Consent follow up will continue through April.</p> <p>SRO prepared for cost review meeting with PIs. Focus for agenda was the changes from the budget assumptions: Smaller sample size (budget assumptions based on a 90% Phase 1 CS RR, and 95% PCG IW RR -- actual Phase</p>		

1 RRs were 79% CS, and 90% PCG), shorter production period (shortened from the 26 weeks budgeted, to 19 weeks), and lighter touch protocol (budgeted 7 attempts/case, actual protocol was 5).

Special Issues				
Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):			1,360,593.68
	Est Cost at Completion (E\$AC):			1,414,885.74
	Total Budget:			2,524,678.00
	Variance (Total Budget minus- E\$AC):			1,109,792.26
	Reason for Variance:			Sample size was significantly less than budgeted (1,932 R's invited to phase 2, budgeted for 2,705). IWER hours and non-sal costs have been significantly lower than budgeted, due to smaller sample size.
Projections as of Apr 17, 2025	Dollars Projected for Month:			86,219.15
	Actual Dollars Used:			58,346.45
	Variance (Projected minus Actual):			27,872.70
	Reason for Variance:			Reduced non-salary costs in freight, postage, and travel domestic categories to better reflect actuals
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

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><div>Pre Production Start: 03/01/2024</div><div>Pretest End: 10/06/2024</div><div>Staffing Complete:</div><div>SS Train Start: 02/24/2025</div><div>DC Start: 03/10/2025</div></div><div><div>Pretest Start: 09/16/2024</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End: 06/10/2025</div><div>DC End: 12/31/2025</div></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)		

Report Period	Mar, 2025 (PSID25)	Implementing
Risk Level	On Track	
Monthly Updates	<p>Summary of March 2025 activities:</p> <p>Production launched on March 10, with English Release 1 CATI (n=150) and Web (n=1070) sample being invited to the survey. IRB approval for the 2025 changes was received on 3/6. During the week of 3/23, English Release 2 CATI (n=292) and Web (n=2548) sample was invited.</p> <p>MSMS - Project launch deadlines were successfully met, with major show stopping bugs previously identified, such as the redbox error for web respondents, corrected before release. MSMS team spent this month first gearing up for, and then turning their attention to post-prod release for Spanish expected in April. Deferred quality of life improvements were implemented and tested including enhancements to TL Work Plans, Review Processes, and Locating flows. Spanish templates were expected for testing to release for 4/14, but only short messages were available for task rules updates during this month. Began drafting Spanish template update timeline. Ongoing concerns with new user management features were explored, specifically around issues of loading/maintaining TLs on the project. Locators cannot be automatically added, field PCs cannot be automatically added. Future core dev release is expected to allow for field PCs to be added into flows, and we began making plans to incorporate them when available. Identified a bug in User Management which was not allowing for ParentOtherRole (which PSID uses for identifying the Locator) to work as expected. Expected behavior was that ParentOtherRole would be assigned through the TL, not directly per lwer. Work around to this problem was to assign ParentOtherRole to each lwer instead, allowing designed Locating features (emails, task assignment) to work as expected. Splitoff work continued, picking up speed in the latter half of the month. Anticipating prod data testing in April. Some data in MSMS is found to be missing in PQT - lines now have to be regenerated. Processes were discussed and we began moving towards ways to identify these cases. Additional issues were discovered in Prod environment, causing Sample Line Grid to not always load correctly, seemingly because lwers were moving while project was still syncing. Core Deve expected in April to resolve this, which will require lwers to wait until sync is completed. Syncs can take quite some time, due to Blaise Upload - every line gets checked for sending up to the server, and lwers with heavy loads may find emailing particularly cumbersome if they cannot move while sync completes. Highlighted a need for Blaise Smart Upload - someway to improve and increase the sync times on Blaise data. Batch emails and texts in Prod after release moving smoothly, no major problem to report. Completes coming, no indications of unexpected system failures.</p> <p>Blaise - Red box error fully resolved. CTT testing for Spanish completed, with sign off occurring early in the month. Spanish testing moved into the integration project for fuller testing. Discovered an issue with skipping CPs and preloaded "DK" information, causing Web Rs to lock at CP entry screen. Also discovered a bug that occurs in very specific circumstances if there are three or more mover out groups which in some circumstances makes it difficult or impossible for Web R to proceed. Decision made by PSID study staff that this was not a show stopper, and that if we decided to correct it and update would have to be in DM3 instead of the upcoming DM2 release. DM2 including Spanish updates were signed off on by March 28. Expect that Spanish release timelines will be preserved.</p> <p>68-ID Site - 68-ID development turned to Locating features. Since some of these interact with MSMS systems, implemented APIs were tested, emails relating to locating efforts updated, and task rules reviewed. Major functionality for 68-ID was more or less complete by 3/24. Some outstanding items were identified with work expected on them into early April. Nice to have items de-prioritized for this wave as lwers in Prod begin using features.</p> <p>Training: The second week of Training 1 was 3/3 -3/7, with a focus on conducting the family listing and interview. All lwers passed the DCA, 68ID Site, Family Listing, and Interview certification. TL Training dates were 3/11 - 3/14. T2 training dates are 4/14 - 4/25, with home study from 4/3-4/10. Week 1 will be DCA & 68ID systems training, and Week 2 will be Family Listing and Interview Training. Minor adjustments have been made to the T2 agenda from T1. There will be 29 lwers and 1 PC trained. The T3 training will take place 6/3 - 6/10. Trainings are remote, half-day training with on-staff interviewers. Added a second training coordinator to help with the overlapping training and production demands.</p> <p>Sample Release / Mailing: The advanced mailing protocol has been finalized and is now underway. It is a complex mailing protocol that includes five releases of CATI and WEB sample, and unique mailings for remails to non-responders, Web special offers, EG, post cards, split-offs, Web VIN experiments, and two incentive amounts. Added staff to help oversee and execute the various production support needs.</p>	
Special Issues		
Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):	1,986,997.56
	Est Cost at Completion (E\$AC):	7,433,830.88
	Total Budget:	7,805,285.00
	Variance (Total Budget minus- E\$AC):	371,454.12
	Reason for Variance:	<p>Note: March 2025 cost report is not yet final -- still making projection updates.</p> <p>Reduced iwer data collection effort due to less sample than budgeted and anticipating a higher percentage of web completes than budgeted.</p> <p>Removed costs associated with new hires and in-person training.</p> <p>Projecting interviewers and survey specialists/directors at a higher rate than budgeted. Designing data collection and training differently than</p>

budgeted.

Projections as of Apr 17, 2025 Dollars Projected for Month:		365,957.15
Actual Dollars Used:		369,694.68
Variance (Projected minus Actual):		-3,737.53
Reason for Variance:		Note: March 2025 cost report is not yet final -- still making projection updates. Data management and training coordination/support hours were higher than projected. Telephone administrative fees and postage costs were higher than projected.

Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:	9,994	89%	4.73
	Current Actual:	598	15%	1.2
	Estimate at Complete:	9,994	89%	4.73
	Variance:			

Other Measures	Note: Current actual metrics based on the Dashboard with the week ending on 3/29/25. 'Current goals' will be populated as production goals are finalized. 'Estimated' goals at completion will be updated as production is underway.
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Project Name	(SAFEGUARD) SAFEGUARD (On Track)		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 2,200,868.00	Indirect Budget: 1,232,492.00	Total Budget: 3,433,360.00
Principal	Vincent Capaldi (Uniformed Services University)		
Investigator/Clients	Ronald Kessler (Harvard Medical School)		
	Matthew Nock (Harvard University)		
Funding Agency	Department of Defense, Office of the Assistant Secretary of Defense for Health Affairs (within DHA), through the Uniformed Services University of the Health Sciences (USUHS)		
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Daniel Tomlin		
	Budget Analyst: William Lokers		
	Production Manager:		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	SAFEGUARD is a study designed to test targeted interventions for preventing harmful behaviors and reducing suicide among service members. SAFEGUARD is composed of 3 components: Life Skills Training, Life Force, and Pathfinding. Each component will have a Baseline survey followed by a 6 and 12 month follow-up survey. SRO will program technical systems and instruments for Life Force and Pathfinding at the Baseline phase. Life Force surveys will be completed via web and WSMS. Pathfinding surveys will be completed via phone and WSMS. Life Skills Training will be implemented by USU/HJF without SRO support during the Baseline phase. SRO will use MSMS and Blaise to collect data for 6 and 12 month follow-up surveys for all 3 components. Follow-up surveys will start via web and then a subsample of non-responders will be selected to complete their surveys by phone. Baseline production will start in July of 2025 and Follow-up production will begin in January of 2026.		
SRO Project Period	01/2025 - 01/2029		
Data Col Period	07/2025 - 11/2028		
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	Stephanie Chardoul - UM PI Shonda Kruger - Ndiaye - Senior Project Advisor Meredith House - Survey Director / Advisor Dan Tomlin - Project Lead Anthony Romanowski - Project Manager (Technical Systems Development) William Lokers - Financial Analyst Joseph Zylka - Financial Analyst Peter Sparks - CAI Programmer (Blaise) Hueichun Peng - WSMS Programmer / Tech Lead Sarah Bromand - WSMS Programmer Cheng Zhou - WSMS Programmer Brianna Sabol - Data Manager Laura Yoder - Data Manager / Advisor David Bolt - Help Desk		
Other Project Name	Safeguard - Life Skills Training Safeguard - Life Force Safeguard - Pathfinding		
Sample Mgmt System	Web SMS; MSMS		
Data Col Tool	Blaise 5		
Hardware	Desktop		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	Other (Incentives provided by HJF/USU)		

Payment Type	N/A			
Payment Method	N/A			

Report Period	Mar, 2025 (SAFEGUARD)		Planning	
Risk Level	On Track			
Monthly Updates	March was focused on finalizing specifications and beginning initial setup of servers and prototypes with coordination between PDMG project managers and the TSG tech team. Work in WSMS has progressed quickly and Blaise development has been underway to test the integration between WSMS and Blaise 5. Our focus has been on the Life Force and Pathfinding components of SAFEGUARD, as these will be the Baselines SRO is providing the systems for. We initially budgeted to provide a similar system for the Life Skills Training component but this was later changed in favor of systems and implementation by Uniformed Services University and the Henry M. Jackson Foundation. As a result, there is less initial work as projected and we show a slight underrun. As we begin development of MSMS specifications and protocols over the next few months, we anticipate hours picking up.			
Special Issues				
Cost as of Mar 31, 2025	Total Cost to Date (direct + indirect):		85,075.76	
	Est Cost at Completion (E\$AC):		3,357,299.81	
	Total Budget:		3,433,360.00	
	Variance (Total Budget minus- E\$AC):		76,060.19	
	Reason for Variance:		The difference is explained by our original budget including the Life Skills Training Baseline systems development, which is no longer being completed by UM SRO.	
Projections as of Mar 31, 2025	Dollars Projected for Month:		63,106.87	
	Actual Dollars Used:		45,362.51	
	Variance (Projected minus Actual):		17,744.36	
	Reason for Variance:		The difference is explained by our original budget including the Life Skills Training Baseline systems development, which is no longer being completed by UM SRO.	
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

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	National Institute of Health		
IRB	HUM#: 00246902	Period of Approval:	
Project Team	Project Lead: Elizabeth Ohryn Budget Analyst: Dean E Stevens Production Manager: Lisa J Carn Senior Project Advisor: Shonda R Kruger-Ndiaye Production Manager 1: Narine Verdiyan Production Manager 2:		
Proposal #	no data		
Description	<p>The Study of Adolescent to Adult Neural Development (SAND) COVID follow-up study is a supplement of the Future of Families Child Wellbeing Study (FFCWS). FFCWS is a longitudinal research project that follows a cohort of nearly 5,000 children born in large U.S. cities in either 1998 or 2000. The study focuses on the influence of social and economic conditions in tandem with the capabilities of parents, the well-being of children, and the policies affecting disadvantaged families. SAND Neuroimaging is a supplement study to the FFCWS. The purpose of SAND Neuroimaging is to learn more about how childhood environments shape brain development and behavior from adolescence into young adulthood. Once child participants reached age 15, the study conducted MRIs and behavioral and psychological assessments. Neuroimaging takes place at regular intervals into adulthood. These assessments help in correlating brain development with cognitive abilities, emotional regulation, social skills, and other important functions.</p> <p>As a result of the COVID-19 pandemic, and because in-person neuroimaging was no longer an option, the FFCWS launched another study, SAND COVID-19, in 2020. The aim of this study is to gather information on familial pairs of young adults (YA) and their parent/primary caregivers (PCG) on how the COVID-19 pandemic impacted their families, households, and communities.</p> <p>Now, four years later, this project is conducting another wave called SAND COVID-19 Follow-up, to which SRO is contributing. This project seeks to gather self-administered Qualtrics interviews from young adult and former caregiver respondents. SRO's role is in encouraging respondents' web completions via a contact protocol including email, text, and phone reminders. If needed, we may take several additional steps to locate our sample individuals including in-depth and batch locating using a paid service such as Accurant.</p>		
SRO Project Period	05/2024 - 01/2025		
Data Col Period	08/2024 - 12/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 05/01/2024 Pretest End: Staffing Complete: SS Train Start: 08/01/2024 DC Start: 08/05/2024 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 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	Mar, 2025 (SAND COVID Follow-Up)	Closing		
Risk Level	On Track			
Monthly Updates	March Update			
	<p>Cost Report:</p> <ul style="list-style-type: none">- The March cost report is expected to be the final one. No projected costs for the future.- In December, the project team approved an additional \$3,330 for a postcard mailing. SRO never requested this entire amount since projections consistently remained in an underrun. SRO is not requesting only the amount to cover the small overrun. <p>End of Project Notes:</p> <ul style="list-style-type: none">- Once data collection began, three items were added to the work scope: sending a letter, sending a postcard, and extending data collection by two months. The approved total cost for these additional components was \$52,733.97. From the beginning of the effort, a request was made to limit the number of contact attempts sent to each respondent. Twelve attempts were planned at the start of the project. Four additional attempts were added with the two-month extension to data collection.- Initially, the sample percentage estimated to require locating was between 20 and 25%. However, 31% of the sample required a locating intervention. These methods included calling contact people (or other known relatives) and web/database searches.- The SAND COVID participants were stored in Ripple, an online database tool. Considerable effort was dedicated to establishing standard data fields and cleaning up variables to ensure that information was loaded correctly when provided to SRO.- The project enhancements SRO introduced included emails sent in batch, authenticated links for accessing the survey, QR code access on letters and postcards that included authenticated links unique to each respondent, database locating, automatic downloads from Qualtrics using an API, and softphone text messages.- At the beginning of production, the study team identified the initial SAND COVID's response rate as 73% for young adults and 70% for PCGs. However, upon closer review, it was discovered that known hard-to-reach sample lines were not included during the first SAND COVID effort, which meant the response rate was closer to 50% for each participant group. The data collection effort also took 52 weeks compared to 22 weeks for the SAND COVID Follow-up project.- Respondent payment problems required more effort for SRO than initially expected. This included a Tango outage at the start of data collection that required heavy communication with respondents who completed the survey during the first seven days of the study and the need to submit requests throughout the interview period.			
Special Issues				
Cost as of Apr 08, 2025	Total Cost to Date (direct + indirect):	269,481.56		
	Est Cost at Completion (E\$AC):	269,481.56		
	Total Budget:	268,294.00		
	Variance (Total Budget minus- E\$AC):	-1,187.56		
	Reason for Variance:	The project had previously received funding approval to complete a mailing. The financial analyst is working with project staff to obtain these funds, which will remove the overrun.		
Projections as of Apr 08, 2025	Dollars Projected for Month:	135.05		
	Actual Dollars Used:	136.83		
	Variance (Projected minus Actual):	-1.78		
	Reason for Variance:	Projected recharges were slightly more than projected.		
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 2025) SCA Web 2025 (On Track)		
Project Mode	Primary: Not Available		
Project Type	Sponsored Projects		
Budget	Direct Budget: 136,554.00	Indirect Budget: 0.00	Total Budget: 136,554.00
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	01/2025 - 12/2025		
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	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) Lisa Carn (Coder) Peter Sparks (Programmer) Carolyn Vieira-Martinez (Survey Specialist)		
Other Project Name	SCA Web 2025		
Sample Mgmt System	Web SMS		
Data Col Tool	Blaise 5		
Hardware	NA		
DE Software	N/A		
QC Recording Tool	N/A		
Incentive	Not used		
Administration	N/A		
Payment Type	N/A		
Payment Method	N/A		

Report Period	Mar, 2025 (SCA Web 2025)		Initiation
Risk Level	On Track		
Monthly Updates	During the March 2025 calendar month, SCA coding processed 1,155 cases with an additional 126 cases for IRR (total of 1,281 cases). IRR rates remain at acceptable levels for project staff.		

Special Issues

Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):	23,740.34
	Est Cost at Completion (E\$AC):	120,486.06
	Total Budget:	136,554.00
	Variance (Total Budget minus- E\$AC):	16,067.94
	Reason for Variance:	Much like previous months, programming hours and costs came in much lower than projected. Further, coding hours this month came over more than projected. More than projected coding hours were charged during March. This was due to a short code correction to one coders timesheet, continued acclimation to coding by another coder, and an increased number of cases needing coding.

Projections as of Apr 17, 2025	Dollars Projected for Month:	14,448.38
	Actual Dollars Used:	11,787.61
	Variance (Projected minus Actual):	2,660.77
	Reason for Variance:	The under than projected costs for programming, combined with the more than projected costs associated with coding increased the underrun.

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

Other Measures

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

DE Software	N/A
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group
Payment Type	Other (Tango cards)
Payment Method	Other (Electronic gift cards via email)

Report Period	Mar, 2025 (SCIP 2024)	Closing
Risk Level	On Track	
Monthly Updates	We are wrapping up work on final documentation and data reports for delivery to the PIs.	
Special Issues		
Cost as of Mar 31, 2025	Total Cost to Date (direct + indirect):	114,638.88
	Est Cost at Completion (E\$AC):	118,044.26
	Total Budget:	137,834.00
	Variance (Total Budget minus- E\$AC):	19,789.74
	Reason for Variance:	Respondent TOA cost was less than projected.
Projections as of Mar 31, 2025	Dollars Projected for Month:	16,178.42
	Actual Dollars Used:	11,966.68
	Variance (Projected minus Actual):	4,211.74
	Reason for Variance:	We completed the payments to the 56 lottery winners on 3/3/2025. A few staff used less hours than the projected hours.

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

Other Measures

Project Name	(SRS 2021) Social Relations 2023 (On Track)		
Project Mode	Primary: Face to Face Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 3,937,057.11	Indirect Budget: 2,204,753.00	Total Budget: 6,141,810.11
Principal	Toni Antonucci (ISR)		
Investigator/Clients	Kristine Ajrouch (ISR)		
	Laura Zahodne (ISR)		
Funding Agency	NIH		
IRB	HUM#: HUM00187453	Period of Approval: 8/7/2024 - 8/6/2025	
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 - 01/2025		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 09/01/2022 Pretest End: Staffing Complete: 04/10/2023 SS Train Start: 05/18/2023 DC Start: 05/30/2023 </div> <div> Pretest Start: Recruitment Start: 02/01/2023 GIT Start: 05/16/2023 SS Train End: 05/25/2023 DC End: 12/31/2024 </div> </div>		
Other Project Team Members	Taghreid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall		
Other Project Name	Social Relations 2022, DAWN, Social Relations 2023		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	DRI-CARI		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Check, post (\$25 Informant, \$100 R, \$200 R (end game for panel)); Cash, post (\$75 respondent, \$25 informant); Other (\$2 screener incentive)		
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox)		

Report Period	Mar, 2025 (SRS 2021)		Closing
Risk Level	On Track		
Monthly Updates	The Social Relations project ended interviewing on January 9, 2025. The study is in the closing phases. Code out of final screening and main cases have taken longer than anticipated, and were completed on April 17, 2025. We have completed saliva reconciliation. We are in the process of completing logging reconciliation. This is taking		

longer than anticipated due to tracking down suspended cases where two cognitive kits were used.

The Pls have asked for an interim data deliverable in early May. The early May deliverable will not have cleaned/corrected data. We will plan to deliver final data in mid-June or earlier. Work on weights is delayed due to the delay in getting cases coded out. Weights will be delivered at the end of June with the final report.

After inclusion of accepted partials, SRS completed 1,566 interviews (1,363 new sample cases and 203 panel cases).

Special Issues	There are no special issues to report at this time.		
Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):		6,035,315.42
	Est Cost at Completion (E\$AC):		6,126,943.82
	Total Budget:		6,141,810.11
	Variance (Total Budget minus- E\$AC):		14,866.29
	Reason for Variance:	We will use some of this variance for logging reconciliation, document preparation and delivery and supplies closeout (projections added after cost reports for MPR finalized).	
Projections as of Apr 17, 2025	Dollars Projected for Month:		96,105.77
	Actual Dollars Used:		82,911.10
	Variance (Projected minus Actual):		13,194.67
	Reason for Variance:	We had budgeted time for team leaders to close out the project and complete final code outs. They did not use the time budgeted as the TLs moved to other projects after projections were updated. In addition, hours budgeted for regular staff to conduct reconciliation were not used as planned. Those projections have been moved forward.	

Measures		Units at Complete	RR	HPI
	Current Goal:	1300 new/244 panel		9.0 new/ 9.0 panel
	Goal at Completion:			
	Current Actual:	1363 new, 203 panel		
	Estimate at Complete:			
	Variance:			

Other Measures	Overall HPI (without screening) was 9.4 (8.8 new sample, 14 panel) Hours per screen 7.7 hps, 55 miles per screener.
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Project Name	(STARRS-LS Waves 3, 4, 5 (Yr1)) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study (On Track)		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 8,809,515.00	Indirect Budget: 4,920,601.00	Total Budget: 13,730,116.00
Principal Investigator/Clients	James Wagner (University of Michigan) Robert Ursano (Uniformed Services University of the Health Scienc) Murray Stein / Ron Kessler (University of California San Diego / Harvard)		
Funding Agency	Department of Defense		
IRB	HUM#: HUM00180765	Period of Approval: 3/21/24 - 3/20/25	
Project Team	Project Lead: Meredith A House Budget Analyst: William Lokers Production Manager: Ruth B Philippou Senior Project Advisor: Lisa S Holland Production Manager 1: Jeffrey Albrecht Jr Production Manager 2: Lisa M Lewandowski-Romps		
Proposal #	no data		
Description	<p>This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.</p> <p>For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data.</p> <p>To date, we have completed 2 waves of STARRS-LS interviewing. During Wave 1, we attempted to contact 50,000 individuals and completed approximately 14,500 full interviews. All Wave 1 participants that completed a full Wave 1 interview were asked to participate in Wave 2. Waves 3 and 4, which are covered in this application, will include the full STARRS-LS Wave 2 sample, regardless of whether they completed the interview.</p> <p>In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys).</p>		
SRO Project Period	05/2020 - 02/2025		
Data Col Period	11/2022 - 04/2024		
Security Plan	Yes		
Milestones	<div> <div> Pre Production Start: 04/01/2024 Pretest End: Staffing Complete: 10/29/2024 SS Train Start: 11/21/2024 DC Start: 11/11/2024 </div> <div> Pretest Start: Recruitment Start: 08/19/2024 GIT Start: 11/12/2024 SS Train End: 11/26/2024 DC End: 05/03/2026 </div> </div>		
Other Project Team Members	Ryan Yoder, Keith Liebetreu, Becky Loomis, Steven Sonoras, iAn Woods, Andrew Piskorowski, Asia Paige, Ji Qi, Makenna Harrison, Lamont Manley, Lisa Van Havermaet, Stephanie Windisch, Karl Dinkelmann, Peter Sparks. Shane Empie, Pam Swanson, Jim Rodgers, Marcus Blough, Ricardo Rodriguez, Pete Westhead		
Other Project Name	STARRS-LS Continuation		
Sample Mgmt System	MSMS		
Data Col Tool	Blaise 5		
Hardware	Laptop; Desktop; [UM cell] Phone		

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

Report Period	Mar, 2025 (STARRS-LS Waves 3, 4, 5)	Implementing
Risk Level	On Track	

Monthly Updates	<p>Upcoming Research Team changes: Last month, we noted that Nancy Sampson (Harvard) will move to half time at the end of June 2025. Audrey Kalmus will be taking on the management part of her role and Marrena Lindberg will take on the functions related to analysis oversight.</p> <p>We have also learned about the following STARRS Project Management Office (Army) staffing changes. These are due to federal administration changes: COL Forrest will return to retiree status at the end of May. His position was not extended as they had thought it might be. COL Wheeler was to be renewed for 2 years, but that decision was recently reversed as well. Gretchen Gaub and Alison Rivera (both Army civilian employees) have submitted Deferred Resignation Requests, which means they will be on administrative leave and paid through September, then resign from their positions. Alison is on maternity leave starting this week (week of 4/14); Gretchen's leave date is not yet known. Their office now consists of Scott and Dr. Cox (Army civilian) and Sean and Hyon (Army contractors). Employees in civilian and contractor positions are required to fulfill project tasks, but given they are now half the size that they were, they will be stretched. The PIs/research team (including U-M) has offered their help and support in any way possible.</p> <p>Project Management and Planning:</p> <ul style="list-style-type: none"> • Budget/Funding: <ul style="list-style-type: none"> o The no cost extension (NCE) paperwork finally came through from HJF to U-M ORSP on March 14. ORSP processed it and had the award modification completed by March 23. The no cost extension was needed to be able to spend the projected underrun amount after our subaward and accounts expired on February 28, 2025. o We awaited the Year 6 (Wave 5 Yr2) pre-award notice/start letter that will be used to establish a hardship account for charging work after the no cost extension money has been exhausted in early April. [Note, that on 4/18/25 U-M received the Year 6 start letter from HJF] o Cost projections for the remainder of Wave 5 (March 2025+) are ready to be entered into our cost reporting system after we receive the Year 6 start letter and can set up the project. Beginning March 2025, there are no cost projections in our cost monitoring systems. o Also see the Special Issues section. • Proposal: <ul style="list-style-type: none"> o Per discussions with Josh and on the PI call, we understand that U-M should provide a formal budget for Years 7-10 (March 2026-February 2030) that excludes the start of Wave 7 and keeps the incentive at the current amounts of \$50 in Phases 1-3 and \$100 in Phase 4. o James and Meredith began reviewing options for placement of Wave 6 relative to Wave 5 and the end of the 4-year window, and how much gap to plan in between waves going forward. Options/recommendations will be provided to the other PIs/RT. • We continued to keep researchers from Army G-9/DPRR (Dr. Dias, Dr. Jarvis), M&RA and the research team updated about our progress with setting up a meeting with the U-M IRB member who is knowledgeable about STARRS to discuss a possible collaboration and access to the U-M STARRS Data Enclave. • We sent weekly production updates to the PIs, and reported on progress on the call with the Army/M&RA. • Meredith created the agenda/notes and facilitated the weekly meeting with the STARRS project managers. • IRB: <ul style="list-style-type: none"> o A continuing review for the STARRS-LS Continuation protocol (Waves 3 and 4) was approved by the U-M IRB on March 5 and sent to USUHS. The U-M IRB confirmed the requirement for continuing review for this protocol has been removed. o We started work on a continuing review for the STARRS-LS Wave 5 protocol. <p>Enclave and User Support:</p> <ul style="list-style-type: none"> • Annual IA security review: We awaited word from M&RA and AAG about the annual enclave security review. • Annual updates to the SSN-LinkageID list were finished and transfer of the file to AAG was completed on March 18. • The team continued work on address geocoding steps for Wave 3 and 4 respondent addresses, where their addresses have changed from previous survey administrations. • Standard enclave activities continued. These include maintaining security requirements; processing background checks and Great Lakes Cluster (GLC) user access requests, drop box requests, ID swap and data transfer requests; managing software acquisition and updates; and providing user support as needed. Of particular note this month: <ul style="list-style-type: none"> o We continued to track progress of two U-M staff members onboarding to the enclave. o Various R packages were installed in the Windows and Linux environments. • Biomarker group request for assistance: <ul style="list-style-type: none"> o We received and processed a construct file from AAG related to work at USUHS/CHIRP. There was a subsequent request for transfer of administrative data from the enclave to CHIRP. The enclave team provided input on Army requirements that state administrative data cannot be removed from the enclave; we talked with the RT about options for moving genetic data to the enclave or requesting a waiver to transfer administrative data off. 	
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o STARRS genomic, diagnostic and sociodemographic data sharing with DHA (Dr. Evatt): We awaited further information from the requestor about variables of interest.

Public Use Data:

- Wave 4: We assisted ICPSR with questions related to the LSW4 public data. The target for release is May 2025.
- We awaited decisions from the Army/GSC on producing the genetic and bioassay files for public use and placing data in the NIH National Data Archive and Public use release for GWAS.

Wave 5 Production Updates:

- Wave 5 production statistics, as of April 3, 2025, are as follows:
 - o Replicates released: 4 of 14 released with 3,979 sample lines.
 - o Completed interviews: 2,601 (2,511 web; 90 phone)
 - o Replicate 3 had moved to Phase 4 by the end of March. The response rate was 74.6% and trending about 5% pts higher than the average Wave 5 rate.
 - o Replicate 4 was released on March 3 and had moved to Phase 3 by the end of the month. The response rate was 44.2% and tracking about 2% pts lower than the average Wave 5 rate.
- ? Note that the higher token amounts for the incentive experiment were removed starting with Replicate 4. Throughout March, we wrote up the results of the token experiment ahead of sending it to the PIs and research team.
- o The response rate for completed replicates (Reps 1-2) is 74.3%.

Safety Plan Results:

- The Wave 5 combined Safety Plan rate was 12.1% as of April 3:
 - o Army Chaplains:
 - ? 790 (# started IW), 751 (# completed IW), 55 (safety plan checks), 7.0% activation rate
 - o U-M CCP:
 - ? 1,936 (# started IW), 1,850 (# completed IW), 274 (safety plan checks), 14.2% activation rate

Special Issues

Language in the following area of risk in the report to the PIs/research team has been updated since last month:

- U-M gap in funds for continued Wave 5 work after February 2025 until the Year 6 POP award is received.
 - o We should be able to cover March and part of April 2025 with the no cost extension of the Year 5 subaward. After the NCE money had been spent, the plan was for Year 6 pre-award spending to be available. However, as of the date of this report (April 11, 2025), we have not yet received the pre-award spending authorization.
 - ? On April 9, the HJF admin emailed: "I just approved U of Michigan March 2025 invoice for \$295,378.71 under our STARRS Subaward Agreement 6380. HJF still has over half a million- to be exact- \$675,495.47 through the 31st of May 2025 under the STARRS-LS Project available. As a consequence, I will have to hold off on issuing a Start Letter until after the next billing of April 30th 2025."
 - ? The U-M financial analyst provided the following response: "The calculation of the remainder HJF noted does not appear to be correct. \$675,495.47 does not include the invoice referenced in the message, so it should be \$295,378.71 less, or \$380,116.76. Our remaining balance doesn't reflect the entire picture because I am waiting for U-M sponsored programs to move expenses from last year (Year 4) to this year. This is something I've been working on since the last year closed and should be processed in April. That amount is about \$330k. With \$380k remaining, that leaves around \$50k for April expenses which we've already spent."
 - ? Note that the \$330k was spent at the end of 2024, but those dollars were parked on Year 4 (we overran Year 4) until the Year 5 award was available and then the U-M financial analyst started the transfer process to Year 5, which is still not complete.
 - ? It appears there is a problem with invoicing and records catching up with the actual spending. In addition, once HJF sends U-M a letter or award, there is processing time on the U-M side - often multiple weeks. SRC often ends up working without a contract or letter of intent for weeks or months at a time.
 - ? We have started the process for a hardship, but we prefer not to take this step without a letter of intent because it is money SRC is spending without any backing. The only other option is to stop work.
 - o Once the pre-award spending authorization is received, we understand it will be for 90 days. This means the actual Year 6 subaward will need to be in place by July 1, 2025.
 - ? After HJF sends the annual subaward to U-M, the back and forth negotiation of contract language between U-M ORSP and HJF takes a minimum of 5 weeks, but usually much longer. The Year 5 subaward required 12 weeks of discussion. Because of this, with a 90-day hardship, the drafted subagreement would need to be received by U-M around April 7, 2025 (to accommodate 12 weeks). As of the writing of this report, that date has already passed. Receipt of the pre-spending letter is critically urgent but the actual award will need to come soon after to avoid delays in contract implementation.

[Note, that on 4/18/25 U-M received the Year 6 start letter from HJF]

Cost as of Feb 28, 2025	Total Cost to Date (direct + indirect):	13,391,939.24
	Est Cost at Completion (E\$AC):	13,391,939.24
	Total Budget:	13,730,116.00
	Variance (Total Budget minus- E\$AC):	338,176.76
	Reason for Variance:	Feb 28, 2025 marks the end of the 2020-2025 5-year scope of work and budget. We will spend down the underrun amount in the no cost extension. The \$338k remainder will cover March but not all of April.
Projections as of Feb 28, 2025	Dollars Projected for Month:	367,959.07
	Actual Dollars Used:	332,626.64
	Variance (Projected minus Actual):	35,332.43

Reason for Variance:

Most of the slight under and over-spending balanced each other out. Iwer hours were again lower than expected and TL hours were slightly higher, but combined, the hours spent were about 8% less than projected. The larger variances were TOA payments coming in about \$11K less (direct) and ICPSR work coming in about \$14K less (direct). We should see these charges hit in March and April.

Measures		Units at Complete	RR	HPI
	Current Goal:	10,689	75%	12.0
	Goal at Completion:	10,689	75%	12.0
	Current Actual:	2,601	74.3% (Reps 1-2)	15.8
	Estimate at Complete:	10,689	75%	12.0
	Variance:	0	0	0

Other Measures

Stats as of 4/3/25

Project Name	(WalSS) U-M Wallenberg Institute Student Survey (On Track)		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 1,002,656.00	Indirect Budget: 0.00	Total Budget: 1,002,656.00
Principal	Mark Tessler (University of Michigan)		
Investigator/Clients			
Funding Agency			
IRB	HUM#: HUM00269204		Period of Approval:
Project Team	Project Lead: Jeffrey Albrecht Jr Budget Analyst: Nicole Danielle Doherty Production Manager: William Keating Senior Project Advisor: Shonda R Kruger-Ndiaye Production Manager 1: Nahid Sultana Production Manager 2:		
Proposal #	no data		
Description	The U-M Wallenberg Institute Student Survey is a longitudinal, web-based survey study of U-M students that investigates experiences with and perceptions of diverse religious and ethnic groups. The broad purpose of the study is to observe how those experiences and perceptions change over the course of students' time at U-M. The study will include a pre-study phase followed by five annual waves of web survey data collection each fall from 2025-2029. The research is being conducted by the Survey Research Operations (SRO) unit at the Institute for Social Research's Survey Research Center on behalf of Mark Tessler and the Wallenberg Institute.		
SRO Project Period	02/2025 - 12/2029		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 02/01/2025 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	Wallenberg Institute Student Survey		
Sample Mgmt System	Web SMS		
Data Col Tool	Qualtrics/Illume		
Hardware	NA		
DE Software	NA		
QC Recording Tool	Live monitoring		
Incentive	Yes, R		
Administration	NA		
Payment Type	Other (Electronic gift card, post)		
Payment Method	Other (Tango Card from ISR Business Office)		

Report Period	Mar, 2025 (WalSS)		Initiation
Risk Level	On Track		
Monthly Updates	Project Setup -Jeffrey continued to work with Nicole D and Shonda to set up the project budget. -Jeffrey had initial meetings with Raphael, Marsha, Jennie Williams, Hueichun, and Wen to give them an overview of the project and timelines. Survey Design -The research team has needed considerable support in identifying constructs to monitor over time and designing survey measures to capture them in a way that can be used for longitudinal analyses. -Jeffrey helped the PIs to clarify what they were interested in assessing and how they plan to use the data and findings. They noted that they intend to use the findings from Wave 1 to further engage the university to extend and possibly increase funding. However, their initial focus was largely academic, including constructs and research		

questions geared towards academic journals, much more so than university leadership. So, Jeffrey worked with the PIs to identify constructs that could be reasonably measured with U-M students and would be of interest to different communities on campus.

-There were several challenges in the survey design process, most notably the threat of social desirability bias in the data. The PIs asked very direct questions about negative perceptions of specific religious groups, e.g., "Jews have too much control over global financial markets." The first person that Jeffrey tested the survey with was offended and said that she would drop out once she got to those questions, so that led to discussions with the PIs on other aspects of prejudice that they could assess without causing too much controversy or offending respondents, which is a large task in the current political climate on campus.

-Jeffrey reviewed literature on measuring prejudices, drafted items that were based on widely known studies (e.g., by Pew) and also several novel items, and consulted with several experts in the survey design process (including Lisa Holland and Henning Silber). The items were tested in focus groups, which will be described in the April MPR.

Training

-Jeffrey trained Bill K in best practice methods for facilitating focus groups, including several practice focus group sessions and Bill attending some meetings with the PIs to get a strong understanding of their goals and meanings behind items.

-Jeffrey and Bill onboarded Nahid to observe and document the focus groups.

Recruiting Respondents

-Jeffrey created a recruitment flyer and screener survey in Qualtrics.

-Nahid created a list of student organizations that were based on religious affiliations. The plan was to recruit respondents from several key demographics.

-Jeffrey reached out to the orgs and very few responded. Raphael put in a request for 500 student names and emails with the Registrar's Office. (It took them about four weeks to deliver). Stephanie sent out a message to all of SRC to ask staff to share the recruitment messages with college students they know, which resulted in just about enough interested participants for the pre-study (goal was 50 total). The focus groups ended up being pushed back to begin in April.

Special Issues		<p>-Survey design, data analysis planning, and project setup all are taking more effort than anticipated, because the PIs needed extra support. Some of the key challenges are that they didn't have very clear ideas about their research goals, so they changed over time.</p> <p>-Also, national regulations concerning matters that we are surveying about, such as race, gender, the Israel-Palestine conflict, and discrimination towards Jews on campus have been changing, so the Wallenberg and SRO teams are proceeding with extra caution, including (for example) extra vetting of the survey by SRO Admin and SRC partners.</p>		
Cost as of Apr 21, 2025		Total Cost to Date (direct + indirect):	12,394.51	
		Est Cost at Completion (E\$AC):	283,078.16	
		Total Budget:	1,002,656.00	
		Variance (Total Budget minus- E\$AC):	558.84	
		Reason for Variance:	Estimated cost at completion is for Year 1 only (pre-study and Wave 1), which has a budget of \$283,637. Years 2-5 are projected to their respective budgets.	
Projections as of Apr 21, 2025		Dollars Projected for Month:	9,690.92	
		Actual Dollars Used:	8,174.22	
		Variance (Projected minus Actual):	1,516.70	
		Reason for Variance:	The underrun was due to uncharged vacation accrual and less time used by Nahid than projected.	
Measures		Units at Complete	RR	HPI
	Current Goal:	50		
	Goal at Completion:	50		
	Current Actual:	33		
	Estimate at Complete:	33		
	Variance:	17		
Other Measures				

Developmental/Initiative Projects Dashboard

NonArchived Development Initiative and No-DataCol Projects						
Project	Type	Phase	Project Lead	Jan	Feb	Mar
<i>TSME25 Blaise 5 (423562)</i>	Initiatives	Initiation	Karl A Dinkelmann			
<i>TSME25 DCO Systems Support (483248)</i>	Initiatives	Implementing	Vivienne Y Outlaw			
<i>TSME25 MSMS Line Generator (483227)</i>	Initiatives	Planning	Mark Simonson			
<i>TSME25 MSMS Performance (425267)</i>	Initiatives	Implementing	Jim Rodgers			
<i>TSME25 ODS Data Dictionary (425198)</i>	Initiatives	Planning	Mark Simonson			
<i>TSME25 QC Systems (483249)</i>	Initiatives	Implementing	Sarah Elisa Broumand			
<i>TSME25 System Maintenance - General (483910)</i>	Initiatives	Implementing	Jeffrey L Smith			
<i>TSME25 Team Dynamix (425197)</i>	Initiatives	Initiation	David Bolt			
<i>TSME25 TEAM LOCATION (424466)</i>	Initiatives	Initiation	Mark Simonson			
<i>TSME25 Translation Tool (483424)</i>	Initiatives	Implementing	Karl A Dinkelmann			

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	Mar, 2025 (TSME25 Blaise 5 (423562))		Initiation
Risk Level	On Track		
Monthly Updates	<p>We had some significant movement on the load testing front leading up to the Blaise User Conference, where Shane and Jude presented on the topic (paper: https://www.blaiseusers.org/2025/papers/5_2.pdf and presentation: https://www.blaiseusers.org/2025/ppt/IBUC2025_S5_1.pdf). We are working to understand why our load testing results drastically differ from those of CBS. Additionally, we recently learned that the Blaise web runtimes are multi-threaded. We had been operating under the assumption that Blaise is not multi-threaded. However, as part of this revelation, we determined that the back-end management server is not multi-threaded, but the front-end web runtimes are. Therefore, we also intend to examine whether using CPUs (server cores) or more web servers yields better results. Nevertheless, we are working towards a more performant web survey environment for Blaise.</p>		

Special Issues

Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):	4,584.68
	Est Cost at Completion (E\$AC):	7,236.01
	Total Budget:	10,000.00
	Variance (Total Budget minus- E\$AC):	2,763.99
	Reason for Variance:	na

Projections as of Apr 17, 2025	Dollars Projected for Month:	1,988.50
	Actual Dollars Used:	2,368.37
	Variance (Projected minus Actual):	-379.87
	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 DCO Systems Support (483248)) TSME25 DCO Systems Support (483248) (On Track)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 40,000.00	Indirect Budget: 0.00	Total Budget: 40,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Vivienne Y Outlaw Budget Analyst: Ivanna Iavorska-Em Production Manager: Senior Project Advisor: Production Manager 1: Production Manager 2:		
Proposal #	no data		
Description	To be determined		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		
Milestones	<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	Mar, 2025 (TSME25 DCO Systems)		Implementing
Risk Level	On Track		
Monthly Updates	- Set up special reports for TeamTailor OnStaffer recruitment - Train back-up support for Ruyi - Met with PSID/MSMS/ODS team to clarify the project assignment details and team structure - Wored on the TeamDynamix integration modules as related to Fred - Changed Project Assignment Performance Indicator default mdoule - Supported Iwer Website and coordnated with CMT on environment updates and sync issue		
Special Issues			
Cost as of Apr 08, 2025	Total Cost to Date (direct + indirect):		27,575.85
	Est Cost at Completion (E\$AC):		42,266.77
	Total Budget:		40,000.00
	Variance (Total Budget minus- E\$AC):		-2,266.77
	Reason for Variance:		VO

Projections as of Apr 08, 2025		Dollars Projected for Month:		2,275.88
		Actual Dollars Used:		2,747.86
		Variance (Projected minus Actual):		-471.98
		Reason for Variance:		
		VO		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures	x			

Project Name	(TSME25 MSMS Line Generator (483227)) TSME25 MSMS Line Generator (483227) (On Track)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 10,500.00	Indirect Budget: 0.00	Total Budget: 10,500.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Mark Simonson Budget Analyst: Nicole Danielle Doher Production Manager: Sarah Elisa Broumand Senior Project Advisor: Carol Lively Production Manager 1: Production Manager 2:		
Proposal #	no data		
Description	TSME25 MSMS Line Generator		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	TBD		
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Mar, 2025 (TSME25 MSMS Line Generator)		Planning
Risk Level	On Track		
Monthly Updates	The first version of the web appliation was develope with the exception of creating new loginid for Web applications automatically. Testing of what is currently available is underway. Expeciting to finish this by the end of the fiscal year.		
Special Issues			
Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):		7,003.06
	Est Cost at Completion (E\$AC):		10,700.15
	Total Budget:		10,500.00
	Variance (Total Budget minus- E\$AC):		-200.15
	Reason for Variance:		minimal variance
Projections as of Apr 17, 2025	Dollars Projected for Month:		5,081.24

Actual Dollars Used:		4,677.03		
Variance (Projected minus Actual):		404.21		
Reason for Variance:		minimal variance		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

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

Report Period	Mar, 2025 (TSME25 MSMS Performance		Implementing
Risk Level	On Track		
Monthly Updates	Work is proceeding		
Special Issues			
Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):		54,971.89
	Est Cost at Completion (E\$AC):		76,549.76
	Total Budget:		100,000.00
	Variance (Total Budget minus- E\$AC):		23,450.24
	Reason for Variance:		Update
Projections as of Apr 17, 2025	Dollars Projected for Month:		6,971.31
	Actual Dollars Used:		6,874.67

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

Report Period	Mar, 2025 (TSME25 ODS Data Dictionary		Planning
Risk Level	Some Concerns		
Monthly Updates	Sarah B was not able to meet with stakeholders yet on this effort as other project priorities have taken higher priority. The plan will be to start this in May.		
Special Issues			
Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):	339.85	
	Est Cost at Completion (E\$AC):	4,329.56	
	Total Budget:	4,500.00	
	Variance (Total Budget minus- E\$AC):	170.44	
	Reason for Variance:	Funds will be carried forward	
Projections as of Apr 17, 2025	Dollars Projected for Month:	0.00	

Actual Dollars Used: 0.00

Variance (Projected minus Actual): 0.00

Reason for Variance: Funds will be carried further

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	Project Lead: Sarah Elisa Broumand Budget Analyst: Nicole Danielle Doher Production Manager: Senior Project Advisor: Shonda R Kruger-Ndiaye Production Manager 1: Production Manager 2:		
Proposal #	no data		
Description	to be entered		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Shaowei Sun, Brianna Sabol, Andrew Piskowoski, Cheng Zhou, Hueichun Peng, LihShwu Key		
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
=====			
Report Period	Mar, 2025 (TSME25 QC Systems)		Implementing
Risk Level	On Track		
Monthly Updates	Specifications for next tasks for programmer were created and delivered to the programmer.		
Special Issues			
Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):		17,689.70
	Est Cost at Completion (E\$AC):		34,312.92
	Total Budget:		35,000.00
	Variance (Total Budget minus- E\$AC):		687.08
	Reason for Variance:		Minimal variance.
Projections as of Apr 17, 2025	Dollars Projected for Month:		1,668.78
	Actual Dollars Used:		1,249.04
	Variance (Projected minus Actual):		419.74

Reason for Variance:

Funds will be carried forward

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 System Maintenance - General (483910)) TSME25 System Maintenance - General (483910) (Some Concerns)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 35,000.00	Indirect Budget: 0.00	Total Budget: 35,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Jeffrey L. Smith		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	Support for TSG systems		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div>Pre Production Start:</div> <div>Pretest End:</div> <div>Staffing Complete:</div> <div>SS Train Start:</div> <div>DC Start:</div> </div> <div> <div>Pretest Start:</div> <div>Recruitment Start:</div> <div>GIT Start:</div> <div>SS Train End:</div> <div>DC End:</div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Mar, 2025 (TSME25 System Maintenance -		Implementing
Risk Level	Some Concerns		
Monthly Updates	<p>File Synchronization and Control</p> <ul style="list-style-type: none"> - Completed FileSync enhancements in SurveyTrak. - Implemented new FTP controls for improved data transfer security. <p>Security and Encryption</p> <ul style="list-style-type: none"> - Enhanced password encryption processes within SurveyTrak. - Conducted Active Directory login testing for WebTrak/WebLog. <p>Performance Monitoring</p> <ul style="list-style-type: none"> - Monitored and managed Splunk log files for system performance insights. -Reviewed SuperUser access for security assurance. <p>System Improvements and Documentation</p> <ul style="list-style-type: none"> - Resolved RCLS issues and documented new builds. - Attended ST/PB build team meetings to coordinate future developments. 		

- Additional Tasks
- Developed and scheduled FolderCleaner application tasks.
 - Tested FTP control mechanisms for reliability.
 - Updated Check Processing System

Special Issues	During periods without active project work, our team remains focused on advancing and strengthening ST (ST 25 and ST 11). This includes enhancing security, addressing tasks requested by CMT that impact ST, implementing programming fixes, and more. We are committed to continuously moving forward and improving our systems.			
Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):	60,416.09		
	Est Cost at Completion (E\$AC):	69,894.91		
	Total Budget:	35,000.00		
	Variance (Total Budget minus- E\$AC):	-34,894.91		
	Reason for Variance:	see below		
Projections as of Apr 17, 2025	Dollars Projected for Month:	4,513.93		
	Actual Dollars Used:	15,807.55		
	Variance (Projected minus Actual):	-11,293.62		
	Reason for Variance:	see below		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(TSME25 Team Dynamix (425197)) TSME25 Team Dynamix (425197) (On Track)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 21,000.00	Indirect Budget: 0.00	Total Budget: 21,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: David Bolt Budget Analyst: Nicole Danielle Doher Production Manager: Senior Project Advisor: Carol Lively Production Manager 1: Production Manager 2:		
Proposal #	no data		
Description	Team Dynamix implementation: 1) Library of API endpoints to integrate with Team Dynamics. 2). Batch process to call out to Team Dynamix API.		
SRO Project Period	07/2024 - 06/2025		
Data Col Period			
Security Plan	NA		
Milestones	<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	Mar, 2025 (TSME25 Team Dynamix		Initiation
Risk Level	On Track		
Monthly Updates	Defined and consolidated number for fields for API calls.		
Special Issues			
Cost as of	Total Cost to Date (direct + indirect):		0.00
	Est Cost at Completion (E\$AC):		0.00
	Total Budget:		21,000.00
	Variance (Total Budget minus- E\$AC):		0.00
	Reason for Variance:		
Projections as of	Dollars Projected for Month:		0.00
	Actual Dollars Used:		0.00

Reason for Variance:

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

Other Measures

Project Name	(TSME25 TEAM LOCATION (424466)) TSME25 TEAM LOCATION (424466) (On Track)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 25,000.00	Indirect Budget: 0.00	Total Budget: 25,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Mark Simonson Budget Analyst: Nicole Danielle Doher Production Manager: Sarah Elisa Broumand Senior Project Advisor: Carol Lively Production Manager 1: Production Manager 2:		
Proposal #	no data		
Description	<p>TSME25 TEAM LOCATION</p> <p>SRO Survey Project Production Teams have been using various tools to perform respondent location in various sample management systems. Each system has developed its own tool to satisfy its project requirements. For example, SurveyTrak projects use Weblogs Locating application, WSMS has a custom locating module for MiCRESS, and other projects use the Iwer Location module for MSMS projects.</p> <p>Team Locating is slightly different from Iwer locating in that their users use alternate sources to gather information about our respondents and contact persons, confirm contact with a viable lead and then share that information with the Interviewers to follow up with a phone call and ultimately an Interview.</p> <p>SRO wants to develop a stand alone tool that is agnostic to any sample management system so that in the future this tool can be used as a service to any project.</p> <p>Spedification Document can be found at: https://docs.google.com/document/d/108rO0HhlfguNaUeWUebQuia8AB2KL7B-6isTyqWeMSc/edit?tab=t.0#heading=h.2payusa1crxf </p>		
SRO Project Period	01/1996 - 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			
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	Mar, 2025 (TSME25 TEAM LOCATION		Initiation

Risk Level	On Track			
Monthly Updates	Project Planning started. A Team Locating Input team composed of DCO and PDMG staff where identified and invited to help define Team Locating specifications for SRO. Initial version of the specification document with initial mock ups have been defined and are in the process of getting signed off for preparation of programming work. Discussions with the MSMS team are underway to make sure there is a feasible integration/compatibility between the systems.			
Special Issues				
Cost as of	Total Cost to Date (direct + indirect):			1,983.81
	Est Cost at Completion (E\$AC):			25,000.00
	Total Budget:			25,000.00
	Variance (Total Budget minus- E\$AC):			0.00
	Reason for Variance:			
Projections as of	Dollars Projected for Month:			1,983.81
	Actual Dollars Used:			1,983.81
	Variance (Projected minus Actual):			0.00
	Reason for Variance:			
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

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

Report Period	Mar, 2025 (TSME25 Translation Tool		Implementing
Risk Level	On Track		
Monthly Updates	<p>We had some significant movement on the Blaise translation tool front leading up to the Blaise User Conference, where Karl and Kelly presented on the topic (paper: https://www.blaiseusers.org/2025/papers/3_1.pdf and presentation: https://www.blaiseusers.org/2025/ppt/IBUC2025_S3_1.pdf). We are now parsing surveys, writing the information to XLIFF, and updating the translations in the Blaise source code. We are turning our efforts towards dealing with texts found in the rules sections of the code (question fills and edit check text).</p>		

Special Issues	na			
Cost as of Apr 17, 2025	Total Cost to Date (direct + indirect):			4,474.64
	Est Cost at Completion (E\$AC):			6,799.15
	Total Budget:			10,500.00
	Variance (Total Budget minus- E\$AC):			3,700.85
	Reason for Variance:			na
Projections as of Apr 17, 2025	Dollars Projected for Month:			2,324.51
	Actual Dollars Used:			2,709.32
	Variance (Projected minus Actual):			-384.81
	Reason for Variance:			na
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				