# *Survey Research Operations*

# *Monthly Project Report*

## *Sponsored Data Collection Projects and Development Initiative*

***May 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
(LHMS 2025 Spring) Life History Mail Study Spring 2025
(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027
(MTF Early Panel Pilot) Monitoring the Future: A Cohort-Sequential Panel Study of Drug Use, Ages 19-65 - Administrative Supplement #1 (8/10th Grade Panel)
(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027
(NDWS) National Dementia Workforce Study
(NYCHVS) New York City Housing and Vacancy Survey
(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
(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

| Project | Type | Phase | Project Lead | Jan | Feb | Mar | Apr | May |
|---|---|---|---|---|---|---|---|---|
| *ANES 2024* | Sponsored | Closing | Andrew L Hupp | | | | | |
| *BFY* | Sponsored | Implementing | Piotr Dworak | | | | | |
| *BHM Library Project* | Sponsored | Closing | Karin Schneider | | | | | |
| *CARE Military* | Sponsored | Closing | Donnalee Ann Grey-Farquharson | | | | | |
| *CARE SALTOS MTEC* | Sponsored | Closing | Donnalee Ann Grey-Farquharson | | | | | |
| *CCS* | Sponsored | Planning | Jeffrey Albrecht Jr | | | | | |
| *CVFS-SCAN* | Sponsored | Implementing | Maureen Joan O'Brien | | | | | |
| *FFCWS* | Sponsored | Initiation | Rebecca Gatward | | | | | |
| *Health and Well Being in SE MI* | Sponsored | Closing | Barbara Lohr Ward | | | | | |
| *Healthy Brain Project* | Sponsored | Closing | 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 | | | | | |
| *LHMS 2025 Spring* | Sponsored | Implementing | Gary Hein | | | | | |
| *MTF Base Year 2022_27* | Sponsored | Implementing | Rebecca Gatward | | | | | |
| *MTF Early Panel Pilot* | Sponsored | Implementing | Donnalee Ann Grey-Farquharson | | | | | |
| *MTF Panel 2022-27* | Sponsored | Implementing | Donnalee Ann Grey-Farquharson | | | | | |
| *NDWS* | Sponsored | Implementing | Piotr Dworak | | | | | |
| *NYCHVS* | Sponsored | Planning | Maureen Joan O'Brien | | | | | |
| *PR-PSID* | Sponsored | Implementing | Camila Kendall | | | | | |
| *PSID 2025 OCU* | Sponsored | Closing | Camila Kendall | | | | | |
| *PSID CDS23 Phase 2* | Sponsored | Implementing | Camila Kendall | | | | | |
| *PSID25* | Sponsored | Implementing | Rachel Anne Orlowski | | | | | |
| *SAFEGUARD* | Sponsored | Planning | Daniel Tomlin | | | | | |
| *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 | Planning | Jeffrey Albrecht Jr | | | | | |

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|---|---|
| **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)<br>Shanto Iyengar (Stanford University)<br>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<br>***Budget Analyst:*** William Lokers<br>***Production Manager:*** Theresa Camelo<br>***Senior Project Advisor:*** Grant D Benson<br>***Production Manager 1:*** Margaret Lavanger<br>***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.<br><br>SRO will be conducting the 2024 data collection. |
| **SRO Project Period** | 07/2023 - 01/2025 |
| **Data Col Period** | |
| **Security Plan** | NA |

**Milestones**

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

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| **Other Project Team Members** | Erin McSpadden - Project Manager for the methods pilot<br>Sharon Parker - Production Manager for the methods pilot<br>Raphael Nishimura - Sampling (pilot and production)<br>Paul Burton - Sampling and Reporting<br>Makenna Harrison - Sampling and Reporting<br>Grace DesJardins - Project Support<br>Marsha Skoman - SurveyTrak programming + Tech Lead<br>Karl Dinkelmann - Blaise oversight + Tech Lead<br>James Rodgers - MSMS + Tech Lead<br>Ashwin Dey - WebTrak<br>Pam Swanson - MSMS set-up programming<br>Sarah Broumand - PQT and QC set-up<br>Peter Sparks - Blaise programming<br>Max Malhotra - Blaise programming<br>Youhong Liu - Blaise programming<br>Shanie Empie - Login portal<br>Hueichun Peng - Self-scheduler<br>Tony Romanowski - Technical specifications and testing<br>Andrew Piskorowski - ODS<br>Kelly Chatain - MSMS specs and testing<br>Elizabeth Ohryn - Testing, SSL support<br>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 |

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| **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) |

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| **Report Period** | May, 2025 (ANES 2024) | Closing |
| **Risk Level** | On Track | |
| **Monthly Updates** | The 2024 data collection has ended.<br>In-person:<br>-PRE: 1,042 interviews (966 in-person, 68 phone, 8 mixed + 0 partials)<br>-POST: 90% reinterview goal (n=938)<br>-Actual: 925 (89%); 372 In-person, 220 Telephone, 332 Video + 1 partial<br>Web - Fresh<br>-PRE: 2,063 interviews (2,022 + 41 partials)<br>-POST: 85% reinterview goal (n=1,754)<br>-Actual: 1,769 (86%) (1,721 + 48 partials)<br>Web - Panel<br>-PRE: 2,171 interviews (2,158 + 13 partials)<br>-POST: 90% reinterview goal (n=1,954)<br>-Actual: 2,070 (95%) (2,040 + 30 partials)<br>Web - GSS<br>-PRE: 987 interviews (978 + 9 partials)<br>-POST: 85% reinterview goal (n=839)<br>-Actual: 807 (82%) (807 + 26 partials)<br>Paper<br>-PRE: 245<br>-POST: 85% reinterview goal (n=208)<br>-Actual: 202 (82%)<br><br>SRO is coding religion, occupation, industry, and most important problems (MIP).<br><br>The remaining work on the study consists of weighting, clean-up, and the technical (methodology) report. | |
| **Special Issues** | | |

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| **Cost as of Jun 17, 2025** | ***Total Cost to Date (direct + indirect):*** | | 7,262,753.51 |
| | ***Est Cost at Completion (E$AC):*** | | 7,465,580.59 |
| | ***Total Budget:*** | | 7,526,240.00 |
| | ***Variance (Total Budget minus- E$AC):*** | | 60,659.41 |
| | ***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 Jun 17, 2025** | ***Dollars Projected for Month:*** | | 56,680.98 |
| | ***Actual Dollars Used:*** | | 91,989.39 |
| | ***Variance (Projected minus Actual):*** | | -35,308.41 |
| | ***Reason for Variance:*** | There was a credit of $47,858.11 related tot he IDC we can charge on the NORC contract. | |

| **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** | Dr. Greg Duncan (University of California - Irvine) |
| **Investigator/Clients** | Dr. Kimberly Noble (Teachers College Columbia University) |
| | Dr. Katherine Magnuson (University of Wisconsin) |
| **Funding Agency** | National Institute of Child Health and Human Development (NICHD) |
| **IRB** | ***HUM#:*** HUM00137963  ***Period of Approval:*** |
| **Project Team** | ***Project Lead:*** Piotr Dworak |
| | ***Budget Analyst:*** David Kellermeyer |
| | ***Production Manager:*** Veronica Connors-Burge |
| | ***Senior Project Advisor:*** Stephanie A Chardoul |
| | ***Production Manager 1:*** Margaret Lavanger |
| | ***Production Manager 2:*** |
| **Proposal #** | no data |
| **Description** | University of Michigan Survey Research Center (U-M SRC) is contracted to recruit and interview participants for Baby's First Years -- a longitudinal randomized control trial study.<br><br>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.<br><br>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).<br><br>SRO will be responsible for four interactions with the selected mothers/infants:<br>• Baseline will occur immediately (within 24-48 hours) after birth, in the hospital;<br>• Wave 1 will be a telephone interview with the mother when the child is 12 months old;<br>• 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;<br>• 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.<br><br>Each data collection phase/wave will be a full 12 months, with Baseline starting in April 2018:<br><br>Recruitment/Baseline: 04/01/2018 - 03/31/2019<br>Wave 1: 04/01/2019 - 03/31/2020<br>Wave 2: 04/01/2020 - 03/31/2021<br>Wave 3: 04/01/2021 - 03/31/2022 |
| **SRO Project Period** | 10/2017 - 12/2020 |
| **Data Col Period** | 04/2018 - 12/2020 |
| **Security Plan** | NA |

**Milestones**

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|---|---|---|---|
| ***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 |

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

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| **Report Period** | May, 2025 (BFY) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | BFY Age 5- 8:<br><br>BFY has awarded SRO continuing work throughout Age 8 (August 2027).<br><br>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.<br><br>However, our work supporting A6 lab data collection will continue through July 2025. PIs want to maximize A6 lab response rate and will continue Lab visits through early August 2025. To support that effort, we are helping the research team with the hard to reach Rs which will include some travel and re-contacting cases which completed the lab visit.<br><br>We are also following up with cases which reach Age 6 + 4 months and have completed their lab visit.<br><br>Project Staffing:<br><br>We are working to augment the team. With one bilingual iwer becoming a production manager, one iwer still working but on the side of a full-time job, and one recently expressing a need to pause work on BFY, we start feeling short-staffed.<br><br>As such, BFY is recruiting for on-staffer bilingual interviewers which would be quick to on-board. The scope of the work for new interviewers would include follow up calls and no data collection. As such, we think we can add to the team at a limited cost.<br><br>4-6 iwers in total<br>NE: 1 OS (1 NH resigned)<br>MN: 0 local (1 resigned)<br>NY: 2 OS but 1 of those may pause (was 3, -1 promoted to PM)<br>NOLA: 1 (working full time and re-located to Florida)<br>Locators: 2 (are also placing follow up calls as they can to aid the work)<br>TLs: 1<br><br>Technical system:<br>Working as expected. | |
| **Special Issues** | | |
| **Cost as of Jun 01, 2025** | ***Total Cost to Date (direct + indirect):*** | 8,001,524.60 |
| | ***Est Cost at Completion (E$AC):*** | 8,661,224.68 |

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| | ***Total Budget:*** | 8,700,134.63 |
| | ***Variance (Total Budget minus- E$AC):*** | 38,909.95 |
| | ***Reason for Variance:*** | Total overrun does not look correct ... it may be due to how IDCs are applied on this project. We were able to zero-out overrun after making some adjustments to the projected travel for the project. |
| **Projections as of Jun 01, 2025** | ***Dollars Projected for Month:*** | 51,466.63 |
| | ***Actual Dollars Used:*** | 35,669.23 |
| | ***Variance (Projected minus Actual):*** | 15,797.40 |
| | ***Reason for Variance:*** | The monthly projections are always artificially off due to the specific funding and IDCs. The total amount of IDC is parked in the next month each month. This ensures that the total IDC for the project is accurate, and it is much easier than dividing them up and adding them individually to the IDC the CRS automatically calculates (which are incorrect for this project). |

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

**Other Measures**

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

| **Milestones** | | | |
|---|---|---|---|
| | ***Pre Production Start:*** | ***Pretest Start:*** | |
| | ***Pretest End:*** | ***Recruitment Start:*** | |
| | ***Staffing Complete:*** | ***GIT Start:*** | |
| | ***SS Train Start:*** | ***SS Train End:*** | |
| | ***DC Start:*** | ***DC End:*** 02/28/2025 | |

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| **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 |

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|---|---|---|
| **Report Period** | May, 2025 (BHM Library Project) | Closing |
| **Risk Level** | On Track | |
| **Monthly Updates** | While the project received a reinstatement from IMLS (due to a court ruling), the SRO activities are complete. Carl talked with Xinyan, PIs financial administrator. She will review with the PI on funding the shortfall on the MPathway books. The shortfall (SRO's overrun, previously approved by PI) was covered when they processed the FSR in May 2025 and settled at the Parent Project Grant level. Carl also confirmed that the project grant was well along in the closing process prior to the reinstatement and because SRO did not have any additional funding obligations there is not much, if anything, SRO needs to do. The Sub Project Grants and Short Codes were Inactivated when the Parent Inactivated. (These were subsequently reinstated, but there will be no other SRO charges).<br>Carl will coordinate with Xinyan as to where she is in the close process. He notes that, at this point it may even be too late (and not necessary) to do a budget reallocation which would only show an SRO Budget = SRO Expense. | |

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| **Special Issues** | See above on project closing. The project was reinstated with the sponsor acknowledging a Court order to do such. The actual results of this reinstatement was to move the (parent) project grant end date to 07/31/2025 from 04/08/2025. | |
| **Cost as of Jun 17, 2025** | ***Total Cost to Date (direct + indirect):*** | 213,173.49 |
| | ***Est Cost at Completion (E$AC):*** | 213,173.49 |
| | ***Total Budget:*** | 197,671.00 |
| | ***Variance (Total Budget minus- E$AC):*** | -15,502.49 |
| | ***Reason for Variance:*** | See previous months' summaries. SRO oversaw the mailing, and the project's data collection period was extended, extending the project period. |
| **Projections as of Jun 17, 2025** | ***Dollars Projected for Month:*** | 0.00 |
| | ***Actual Dollars Used:*** | 0.01 |
| | ***Variance (Projected minus Actual):*** | -0.01 |
| | ***Reason for Variance:*** | Carl ran the May 2025 Actuals. There was only $.01 difference from April 2025. |

| **Measures** | | **Units at Complete** | **RR** | **HPI** |
|---|---|---|---|---|
| | ***Current Goal:*** | | | |
| | ***Goal at Completion:*** | 1575 | 27% | |
| | ***Current Actual:*** | | | |
| | ***Estimate at Complete:*** | | | |
| | ***Variance:*** | | | |

**Other Measures**

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| **Project Name** | **(CARE Military) Concussion Assessment, Research and Education (CARE) Consortium 2022 - Military (On Track)** |
| **Project Mode** | Primary: Web Secondary: Telephone Total of Modes: 2 |
| **Project Type** | Sponsored Projects |
| **Budget** | **Direct Budget**: 1,338,017.70 **Indirect Budget:** 347,885.00 **Total Budget:** 1,685,902.70 |
| **Principal Investigator/Clients** | Dr. Steven Broglio (U of M Kinesiology)<br>Dr. Micheal McCrea /Dr. Pasquina (Medical College of Wisconsin/Uniformed Services Un)<br>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<br>***Budget Analyst:*** David Kellermeyer<br>***Production Manager:*** Barbara Aghababian-Homburg<br>***Senior Project Advisor:*** Barbara Lohr Ward<br>***Production Manager 1:*** Hongyu Johnson<br>***Production Manager 2:*** Keith Liebetreu |
| **Proposal #** | no data |
| **Description** | The project follows academy cadets post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure.<br><br>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.<br><br>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.<br><br>The estimate total cost for the overall scope of work is $1,426,001.00. This includes $1,131,747.00 direct and $294,254.00 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders). |
| **SRO Project Period** | 02/2022 - 03/2023 |
| **Data Col Period** | 03/2022 - 08/2023 |
| **Security Plan** | NA |
| **Milestones** | ***Pre Production Start:*** ***Pretest Start:***<br>***Pretest End:*** ***Recruitment Start:***<br>***Staffing Complete:*** ***GIT Start:***<br>***SS Train Start:*** ***SS Train End:***<br>***DC Start:*** ***DC End:*** |
| **Other Project Team Members** | Donnalee Grey-Farquharson, Barb Homburg, Hongyu Johnson, James Koopman, Keith Liebetreu, David Ackuaku, Ruyi Chen, David Kellermeyer |
| **Other Project Name** | CARE-CSI Military |
| **Sample Mgmt System** | Other (non-SRO) |
| **Data Col Tool** | Other (non-SRO) |
| **Hardware** | Laptop; [UM cell] Phone |
| **DE Software** | N/A |
| **QC Recording Tool** | N/A |
| **Incentive** | Yes, R |
| **Administration** | Other (Kinesiology) |
| **Payment Type** | Check, post ($150) |
| **Payment Method** | Other (Kinesiology) |

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|---|---|---|
| **Report Period** | May, 2025 (CARE Military) | Closing |
| **Risk Level** | On Track | |
| **Monthly Updates** | Due to a QuesGen system issue production activities were paused on April 16, 2025. On May 8th Steve Broglio informed SRO that due to unresolvable system issues, data collection would not resume. Prior to the stop directive, in an effort to encourage interviewers to continue with the project, a retention bonus had been negotiated for the field team and will be included in their May 30, 2025 paycheck. The bonus is to be the equivalent of 2 weeks of lost wages during the two weeks immediately preceding the hold status.<br><br>The Researcher has also expressed that CARE would like to pay both field and regular staff a performance bonus and conversations around that is ongoing.<br><br>We have only had a few completions since the shutdown. At the end of May, we had 22521 military (DCP2 + DCP3) cases and 4395 military cases completed. In Eglin group, we had 204 samples and 21 cases completed. | |
| **Special Issues** | | |
| **Cost as of May 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:*** | We do not have new funding currently to support the military work. However, military work resumed in April 2024 with civilian funds.<br><br>**Note: In April 2025, we allocated $33,857.46 to the Military project with the Civilian funds. This brings our cumulative spending on the military project to $617,727.92 from April 2024 to May 2025. The current spending on Military is reflected the underrun in Civilian funds. |
| **Projections as of May 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 Investigator/Clients** | Dr. Steven Broglio (U of M Kinesiology)<br>Dr. Michael McCrea (Medical College of Wisconsin)<br>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<br>***Budget Analyst:*** David Kellermeyer<br>***Production Manager:*** Barbara Aghababian-Homburg<br>***Senior Project Advisor:*** Barbara Lohr Ward<br>***Production Manager 1:*** Hongyu Johnson<br>***Production Manager 2:*** Keith Liebetreu | | |
| **Proposal #** | no data | | |
| **Description** | In 2014, the U.S. Department of Defense (DoD) and the National Collegiate Athletic Association (NCAA) established and funded the Concussion Assessment, Research and Education (CARE) Consortium to inform science, clinical care and public policy related to concussion and repetitive head impact exposure (HIE) in U.S. Military Service Academy (MSA) cadets and collegiate student-athletes. Since then, CARE has enrolled >50,000 MSA cadets/midshipmen and NCAA student-athletes from 30 participating collegiate institutions, representing 26 NCAA sports, and military training and other recreational activities. In addition, the CARE study has captured data on over 5,000 concussed cadets/midshipmen and athletes – the largest concussion database of its kind. This public-private study is designed to answer key knowledge gaps around clinical and neurobiological recovery, brain structure and function, and factors predicting outcomes in MSA members and NCAA student-athletes. This CARE/SALTOS Integrated (CSI) Study phase investigates the nature and causes of long-term effects of head impact exposure and concussion/mild traumatic brain injury (mTBI) in former NCAA student-athletes and military service members. The data collected in this phase will build on that collected in previous phases<br><br>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.<br><br>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.<br><br>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.<br><br>The estimate of funding contributed by the Department of Defense through the MTEC RFP is $2,277,689. This includes $1,807,689 direct costs and $470,000 indirect costs budgeted at the 26% indirect cost rate. The proposed period of support is September 1, 2021 through August 31, 2025. | | |
| **SRO Project Period** | 10/2021 - 08/2026 | | |
| **Data Col Period** | 03/2022 - 02/2026 | | |
| **Security Plan** | NA | | |

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

| | |
|---|---|
| **Other Project Team Members** | Donnalee Grey-Farquharson, Barb Homburg, Hongyu Johnson, Keith 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) |

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|---|---|---|
| **Report Period** | May, 2025 (CARE SALTOS MTEC) | Closing |
| **Risk Level** | On Track | |
| **Monthly Updates** | Due to a QuesGen system issue production activities were paused on April 16, 2025. On May 8th Steve Broglio informed SRO that due to unresolvable system issues, data collection would not resume. Prior to the stop directive, in an effort to encourage interviewers to continue with the project, a retention bonus had been negotiated for the field tea. The bonus is to be the equivalent of 2 weeks of lost wages during the two weeks immediately preceding the hold status.<br><br>A final performance wage will be paid to field and regular staff - details are being discussed.<br><br>Production - The Civilian data collection ended with 6348 completes. | |
| **Special Issues** | | |
| **Cost as of May 31, 2025** | ***Total Cost to Date (direct + indirect):*** | 4,099,326.57 |
| | ***Est Cost at Completion (E$AC):*** | 4,313,113.00 |
| | ***Total Budget:*** | 4,685,914.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 372,801.00 |
| | ***Reason for Variance:*** | The large underrun is due to the removal of field work projections from June 2025 and beyond, and regular staff projections after September 2025.<br><br>**Note: In May 2025, we allocated $33,857.46 to the Military project with the Civilian funds. This brings our cumulative spending on the military project to $617,727.92 from April 2024 to May 2025. The current spending on Military is reflected the underrun amount in Civilian funds. |
| **Projections as of May 31, 2025** | ***Dollars Projected for Month:*** | 87,370.19 |
| | ***Actual Dollars Used:*** | 59,776.17 |
| | ***Variance (Projected minus Actual):*** | 27,594.02 |
| | ***Reason for Variance:*** | A retention bonus for field staff was projected for May but will not hit until June. These projections will be moved forward. |

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

**Other Measures**

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

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|---|---|---|
| **Report Period** | May, 2025 (CCS) | Planning |
| **Risk Level** | On Track | |
| **Monthly Updates** | -Nicole worked on the monthly cost report.<br>-Jeffrey and proposals worked with the CCS PIs to arrange for more funds to be allocated from CCRC to the project for a fall recontact effort to update contact information in anticipation of Waves 4 and 5 of the CCS project. | |
| **Special Issues** | -None to report at this time | |
| **Cost as of Jun 10, 2025** | ***Total Cost to Date (direct + indirect):*** | 855,229.01 |
| | ***Est Cost at Completion (E$AC):*** | 860,665.88 |

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|---|---|---|
| | ***Total Budget:*** | 644,889.00 |
| | ***Variance (Total Budget minus- E$AC):*** | -25,449.88 |
| | ***Reason for Variance:*** | -The true variance after accounting for the funds that Stephanie contributed to CCS is $217.12 underrun.<br>-The current projected effort is based on the current budget in CRS with only projections for Nicole and Kelly without the fall recontact effort. Funds are now in process, so that the overall budget will be increased to allow for the fall recontact. |
| **Projections as of Jun 10, 2025** | ***Dollars Projected for Month:*** | 731.11 |
| | ***Actual Dollars Used:*** | 532.52 |
| | ***Variance (Projected minus Actual):*** | 198.59 |
| | ***Reason for Variance:*** | -The R&D fee was lower than projected. |

| **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** | **(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** | 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.<br><br>SRO will provide support in the following areas: instrument programming and testing, sample management system programming and testing, and data delivery. |
| **SRO Project Period** | 07/2024 - 05/2027 |
| **Data Col Period** | |
| **Security Plan** | NA |

| **Milestones** | | | | |
|---|---|---|---|---|
| | ***Pre Production Start:*** | 08/01/2024 | ***Pretest Start:*** | 10/15/2024 |
| | ***Pretest End:*** | 10/31/2024 | ***Recruitment Start:*** | |
| | ***Staffing Complete:*** | | ***GIT Start:*** | 12/26/2024 |
| | ***SS Train Start:*** | 02/03/2025 | ***SS Train End:*** | 02/12/2025 |
| | ***DC Start:*** | 02/19/2025 | ***DC End:*** | |

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|---|---|
| **Other Project Team Members** | Technical Lead: Jennie Williams, TSG<br>Programmer Analyst-Blaise: Peter Sparks<br>Programmer Analyst-Surveytrak Int: Marsha Skoman, TSG<br>Programmer Analyst-Weblog: Ashwin Dey, TSG<br>Database Administrator: Lishwu Ke, TSG<br>Data Manager Specialist: Jennie Williams, Valyn Dall, TSG<br>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 |

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|---|---|---|
| **Report Period** | May, 2025 (CVFS-SCAN) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | Project Updates:<br><br>Part 1 of the Respondent questionnaire is currently in production. There are 1,924 completed R Part 1's, and 1,827 | |

completed Inf interviews, for an overall 57% RR thus far. Part 2 has been finalized and signed off on, and will launch when WBD launches. The Health Assessment has been fully tested and signed off in English, and a few translations remain.

WBD will be tracked via Survey123 and WebLog. Blood tubes will be scanned at the R's home and linked to Surveytrak via a QR code on the View/Edit tab. Scanning the QR code opends a 'survey' in Survey123, and the Iwer scans barcodes from the tubes into the 'survey' on Survey123. A Phlebotomist completes the blood draw. Blood tubes are then walked to a 'mobile unit' (truck) waiting outside the home and the tubes are centrifuged and scanned again into Survey123. The tubes are transported to a lab at ISER-N where the blood is transferred to new tubes and centrifuged again. At this point, tubes are scanned into WebLog. Tubes are then shipped to the BSL at SRC in the US, where tubes will be again scanned into WebLog. WebLog development is almost complete. Both SRO and ISER-N are testing.

There may be a pause in data collection due to an NIH funding review. If so, SRO will complete all remaining Data Mgt and WebLog work by the end of June until funding issues can be resolved.

The data collection end date has not been set, 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 and the PI is aware. The Nepal team has had a difficult time procuring blood tubes.

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|---|---|---|
| **Special Issues** | Blaise programming delays, Pretest delays, | |
| **Cost as of Jun 09, 2025** | ***Total Cost to Date (direct + indirect):*** | 388,826.28 |
| | ***Est Cost at Completion (E$AC):*** | 560,046.28 |
| | ***Total Budget:*** | 575,439.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 15,392.72 |
| | ***Reason for Variance:*** | Wave 2 dates and effort needed have not yet been finalized. We are working on projections for Wave 2 which once final, will likely eliminate the underrun. |
| **Projections as of Jun 09, 2025** | ***Dollars Projected for Month:*** | 23,512.21 |
| | ***Actual Dollars Used:*** | 27,993.12 |
| | ***Variance (Projected minus Actual):*** | -4,480.91 |
| | ***Reason for Variance:*** | More programming hours were needed to finaize the Health Assessment and a data entry program than were anticipated. |

| **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** | Kathryn Edin (Princeton University) | | |
| **Investigator/Clients** | 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** | 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.<br>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.<br>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:<br>1. What are the conditions and capabilities of unmarried parents, especially fathers?<br>2. What is the nature of the relationships between unmarried parents?<br>3. How do children born into these families fare? and<br>4. How do policies and environmental conditions affect families and children?<br>Princeton are the IRB of record for this project and we have established a reliance agreement (HUM00255752). | | |
| **SRO Project Period** | 10/2024 - 06/2029 | | |
| **Data Col Period** | 01/2026 - 12/2026 | | |
| **Security Plan** | NA | | |

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

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|---|---|
| **Other Project Team Members** | Stephanie Chardoul - UM Principal Investigator<br>Vanessa Clarke Project Assistant<br>Karl Dinkelmann Blaise Systems and Programming Lead<br>Jude Perillo Blaise programmer<br>Jim Rodgers MSMS Lead<br>Pam Swanson MSMS programmer<br>Bill Loker Financial/Business Analyst<br>Ian Ogden Technical Project Manager<br>Jennie Williams Data Manager (75%)<br>Ed Green Data Manager (25%)<br>Wen Chang Statistician (lead DMSS tasks)<br>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 |

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|---|---|
| **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)) |

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|---|---|---|
| **Report Period** | May, 2025 (FFCWS) | Initiation |
| **Risk Level** | On Track | |
| **Monthly Updates** | May 2025<br>- RG and Lisa Holland have reviewed the PCG (Primary Caregiver) and YA (Young Adult) surveys and passed feedback to Princeton (a methodological review was included in our proposal).<br>- Jude (Blaise Programmer) has begun programming a contact info. form - a link will be sent in a Newsletter to the Young Adults. We hope to receive some current contact details via the form.<br>- Newsletter will be mailed to the YA on 7/31 by MSG (DataForce). They will also be running batch updates on the YA and PCG addresses and will append emails and phone numbers (where found) for cases with missing details.<br>- PIs have reviewed and approved the proposed contact protocol for non responders along with the suggested incentive plan.<br>- Princeton agree and are prepared to pay indirect costs on the incentives. (Funding for the incentives was not included in the original proposal as requested by them).<br>- Work has begun on MSMS design and set-up for the initial part of the project (locating and recording communications).<br>- We have agreed to run two experiments during data collection, to test the following; 1. Positioning of the data linkage consent request in the survey 2. Alternative modes of inviting those with lower literacy levels to participate.<br>- Fathers will not be included in the sample for year 27 (except those nominated as the primary caregiver (PCG) in year 22). In the RFP we were asked to provide costs to include mothers and fathers. Apparently this was an error. However, PIs are keen that we attempt to interview young adults and PCGs who did not participate in year 22. The additional funds they hope to obtain from NSF will fund this work. | |
| **Special Issues** | | |
| **Cost as of Jun 17, 2025** | ***Total Cost to Date (direct + indirect):*** | 106,619.64 |
| | ***Est Cost at Completion (E$AC):*** | 4,348,291.91 |
| | ***Total Budget:*** | 4,535,257.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 186,965.09 |
| | ***Reason for Variance:*** | Currently projecting a small underrun - this is about the equivalent to the costs associated with interviewing the fathers, which is now out of scope. I have not yet added the projected costs for incentives - this will lead to an apparent overrun, based on existing funds, however, Princeton has a plan to cover the costs using other sources of funds. |
| **Projections as of Jun 17, 2025** | ***Dollars Projected for Month:*** | 51,541.94 |
| | ***Actual Dollars Used:*** | 43,920.94 |
| | ***Variance (Projected minus Actual):*** | 7,621.00 |
| | ***Reason for Variance:*** | More hours were charged in May than projected but by team members at lower pay rates - work on some tasks was slower to get going than expected. |

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

**Other Measures**

| | |
|---|---|
| **Project Name** | **(Health and Well Being in SE MI) Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan) (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** | | |
|---|---|---|
| | ***Pre Production Start:*** 12/01/2022 | ***Pretest Start:*** |
| | ***Pretest End:*** | ***Recruitment Start:*** 02/01/2023 |
| | ***Staffing Complete:*** 04/10/2023 | ***GIT Start:*** 05/16/2023 |
| | ***SS Train Start:*** 05/18/2023 | ***SS Train End:*** 05/25/2023 |
| | ***DC Start:*** 05/30/2023 | ***DC End:*** 03/15/2025 |

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|---|---|
| **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 |

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|---|---|
| **Report Period** | May, 2025 (Health and Well Being in SE  Closing |
| **Risk Level** | On Track |
| **Monthly Updates** | D-AMP is still on track to close out with a modest underrun.  In May the SRO DAWN team delivered close-to-final data at the request of the research team, and continue preparation of all data deliverables to close the study. The team conducted quality checks on data before delivery. The SRO DAWN team continued work on cognitive packet reconciliation and sorting, supplies disposal, and retrieving Color Trails forms from unused kits. The team also worked on final reports for training, quality control and an overall final report, as well as preparing for the final project review in early June.  The final report and weights will be delivered in July. |

We are still anticipating an underrun on D-AMP and Healthy Brain. 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**

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|---|---|---|
| **Cost as of Jun 17, 2025** | ***Total Cost to Date (direct + indirect):*** | 3,702,005.24 |
| | ***Est Cost at Completion (E$AC):*** | 3,747,748.48 |
| | ***Total Budget:*** | 3,758,127.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 10,378.52 |
| | ***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. The logging reconciliation task is taking longer than anticipated (and more hours than anticipated). We are adjusting projections as we work through the task. |
| **Projections as of Jun 17, 2025** | ***Dollars Projected for Month:*** | 26,237.28 |
| | ***Actual Dollars Used:*** | 21,612.78 |
| | ***Variance (Projected minus Actual):*** | 4,624.50 |
| | ***Reason for Variance:*** | The monthly variance is due to the delay in the start of work on weights, as well as other staff members not charging as much as anticipated. |

| **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:*** | 255/419/308 | 39% scrnr; 55% main | 8.3 new/18 panel |
| | ***Estimate at Complete:*** | | | |
| | ***Variance:*** | | | |

**Other Measures**

Actuals are as of 5/20/2025 and includes partial interviews. 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** | Kristine Ajrouch (Research Center for Group Dynamics, ISR) | | |
| **Investigator/Clients** | Toni Antonucchi (Life Course Development Program, SRC) | | |
| | Laura Zahodne (Life Course Development Program, SRC) | | |
| **Funding Agency** | | | |
| **IRB** | ***HUM#:*** HUM00199306 | | ***Period of Approval:*** 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).<br><br>The proposed study is in response to PAR-19-070 and will test links between sociocultural experiences, brain aging, and cognitive health. The following specific aims will be accomplished by obtaining structural MRI and blood-based AD biomarker data in the Detroit-Aging and Memory Project (D-AMP). This funded parent study obtains high-quality ADRD phenotypes and genetic data on those aged 65+ from a representative sample of 600 Arab Americans, as well as panel participants (N=298) from the Social Relations Study (SRS), to compare to non-Arab Whites in the same geographic area. | | |
| **SRO Project Period** | 07/2024 - 05/2025 | | |
| **Data Col Period** | 07/2024 - 05/2025 | | |
| **Security Plan** | NA | | |

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

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| **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) |

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|---|---|---|
| **Report Period** | May, 2025 (Healthy Brain Project) | Closing |
| **Risk Level** | On Track | |
| **Monthly Updates** | There are no significant updates to the Healthy Brain Project. Work in May consisted of close out activities on the D-AMP project overall, including data QC, reconciliation of cognitive packets, clean up of study supplies, and work on final reports. Work on sample weights was delayed and will not begin in earnest until June. | |

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.

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|---|---|---|
| **Special Issues** | | |
| **Cost as of Jun 17, 2025** | ***Total Cost to Date (direct + indirect):*** | 1,431,031.32 |
| | ***Est Cost at Completion (E$AC):*** | 1,512,054.21 |
| | ***Total Budget:*** | 1,537,306.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 25,251.79 |
| | ***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. |
| **Projections as of Jun 17, 2025** | ***Dollars Projected for Month:*** | 78,041.28 |
| | ***Actual Dollars Used:*** | 56,647.81 |
| | ***Variance (Projected minus Actual):*** | 21,393.47 |
| | ***Reason for Variance:*** | An invoice for shipping costs was delayed. Work on weights was delayed and will now start in June. Many staff members charged less than anticipated across all categories due to work on other projects, or incorrectly balancing charges across the three DAWN projects. |

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

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|---|---|
| **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 Investigator/Clients** | Kayte Spector-Bagdady (UM Medical School ) | | |
| **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** | 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 Februrary 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. | | |
| **SRO Project Period** | 12/2024 - 09/2025 | | |
| **Data Col Period** | 02/2025 - 06/2025 | | |
| **Security Plan** | NA | | |

| **Milestones** | | |
|---|---|---|
| | ***Pre Production Start:*** 02/01/2025 | ***Pretest Start:*** |
| | ***Pretest End:*** | ***Recruitment Start:*** 01/24/2025 |
| | ***Staffing Complete:*** | ***GIT Start:*** |
| | ***SS Train Start:*** 03/06/2025 | ***SS Train End:*** 03/06/2025 |
| | ***DC Start:*** 02/25/2025 | ***DC End:*** 06/30/2025 |

| | |
|---|---|
| **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) |

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|---|---|---|
| **Report Period** | May, 2025 (Hospitals Sharing Data) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | Data collection is scheduled to end at the end of June (6/27/25) with the survey staying open until the end of July to | |

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|---|---|---|
| | allow some additional time for participants to complete the survey if they missed previous reminders or voicemails due to summer out of the office time. The study completed an additional reminder mailing with a NMI token (pen) mailed on 6/5/2025. SSL will spend the remainder of the month completing reminder calls and letting targeted respondents at hospitals know that we will be ending data collection soon. To date there have been 183 completed survey responses and 28 partial responses. The original goal was for 316 responses (50%) response rate. We are now aiming for 200 completed survey responses (around 32% response rate). | |
| **Special Issues** | Using previous projected budget underrun on additional SSL reminder calling hours and an additional reminder mailing. | |
| **Cost as of Jun 17, 2025** | ***Total Cost to Date (direct + indirect):*** | 135,483.91 |
| | ***Est Cost at Completion (E$AC):*** | 202,455.07 |
| | ***Total Budget:*** | 203,554.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 1,098.93 |
| | ***Reason for Variance:*** | Project is running just about at cost. The previous underrun was used to complete an additional reminder mailing along with additional SSL reminder calling hours |
| **Projections as of Jun 17, 2025** | ***Dollars Projected for Month:*** | 37,425.56 |
| | ***Actual Dollars Used:*** | 37,640.10 |
| | ***Variance (Projected minus Actual):*** | -214.54 |
| | ***Reason for Variance:*** | Project running close to budget. Additional SSL hours from the previous month "hit" costs for this month, which may explain the slight variance. |

| **Measures** | | **Units at Complete** | **RR** | **HPI** |
|---|---|---|---|---|
| | ***Current Goal:*** | 200 | 32% | N/A |
| | ***Goal at Completion:*** | 316 | 50% | N/A |
| | ***Current Actual:*** | 183 | 29% | |
| | ***Estimate at Complete:*** | 200 | 32% | |
| | ***Variance:*** | | | |

**Other Measures**

| | | | |
|---|---|---|---|
| **Project Name** | **(HRS 2022 Panel & Baselines) Health and Retirement Study 2022 Main Interviews (On Track)** | | |
| **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 - 07/2025 | | |
| **Data Col Period** | 03/2022 - 07/2025 | | |
| **Security Plan** | NA | | |

| **Milestones** | | |
|---|---|---|
| | ***Pre Production Start:*** 01/01/2021 | ***Pretest Start:*** 11/01/2021 |
| | ***Pretest End:*** 11/23/2021 | ***Recruitment Start:*** 08/01/2021 |
| | ***Staffing Complete:*** 01/15/2022 | ***GIT Start:*** 02/21/2021 |
| | ***SS Train Start:*** 02/23/2022 | ***SS Train End:*** 03/03/2022 |
| | ***DC Start:*** 03/07/2022 | ***DC End:*** 07/26/2025 |

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|---|---|
| **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)<br><br>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<br><br>Coding Lead: Carolyn Vieira-Martinez |
| **Other Project Name** | HRS 2022 Main Iws |
| **Sample Mgmt System** | SurveyTrak; MSMS |
| **Data Col Tool** | Blaise 5; SAQ |
| **Hardware** | Laptop; [UM cell] Phone; Paper and Pencil |
| **DE Software** | Other (Blaise 5 Coding Application); External vendor (DataForce) |
| **QC Recording Tool** | Camtasia |
| **Incentive** | Yes, R; Yes, INF |
| **Administration** | NA |
| **Payment Type** | Check, prepaid ($80 (Panel)); Check, post ($50 (WBD), $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** | May, 2025 (HRS 2022 Panel & Baselines) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | 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.<br>2. Regular data manager tasks to support production activities and continued technical support related to DCA performance issues and a Blaise DIM upload bug affecting web non-response interviewers in MSMS.<br>3. Interviewers exceeded expectations for hours and baseline interviews during the month.<br>4. Field Strategies:<br>-Priority sample: To date, 12,943 cases have been flagged priority of which 3,589 (28%) completed interviews.<br>-Endgame sample: To date, 11,545 cases were mailed the endgame letter of which 1,510 (13%) completed interviews.<br>-Web baseline: 619 cases were mailed the web invite. To date, 37 (6%) completed the web survey.<br><br>*The "measures" table reflects Panel and Baseline combined as of 6/14/2025. Breakdown of Panel and Baseline counts and rates in Other Measures Field. | |
| **Special Issues** | We estimate completing 4,547 EGenX iws (47 above the 4500 goal). We went from projecting a 350 interviews shortfall to projecting 47 interviews over the goal. The sampling projections were made using a 28 HPI, but we have sustained a lower HPI with the endgame design, which limits the number of attempts. Similarly, the screener endgame protocol has helped sustain a low HPS, and the final release of the ~16,000 sample lines in January 2025, helped provide the conditions for higher production. | |
| **Cost as of Jun 17, 2025** | ***Total Cost to Date (direct + indirect):*** | 18,090,272.69 |
| | ***Est Cost at Completion (E$AC):*** | 18,090,272.69 |
| | ***Total Budget:*** | 19,016,630.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 926,357.31 |
| | ***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 Jun 17, 2025** | ***Dollars Projected for Month:*** | -81.60 |
| | ***Actual Dollars Used:*** | 376.85 |
| | ***Variance (Projected minus Actual):*** | -458.45 |
| | ***Reason for Variance:*** | Minimal Variance |

**Measures**

| | Units at Complete | RR | HPI |
|---|---|---|---|
| ***Current Goal:*** | 20,879 | 51% | 12.8 |
| ***Goal at Completion:*** | 22,215 | 44% | 8.3 |
| ***Current Actual:*** | 20,942 | 51% | 12.7 |
| ***Estimate at Complete:*** | 20,912 | 42% | 9.8 |
| ***Variance:*** | 1,303 | 2% | 1.5 |

| | |
|---|---|
| **Other Measures** | Baselines:<br>-EGenX generated from screener: Goal: 4,003 iws; Current: 3,957 iws from 13,367 lines spawned; RR: 29.9%.<br>-MOC: Goal: 2,000 iws; Final: 2,047 iws (36.4% RR). End date 11/15/2024<br>-2019 EGenX baselines: Goal: 468 iws, Final: 497 iws (74.4% RR). End date 5/29/2024<br>Panel: Revised RR Goal: 68% (original goal 74%), Final: 14,441 iws (68% RR). End date 9/2/23 |

| | | | |
|---|---|---|---|
| **Project Name** | **(HRS 2024) Health and Retirement Study 2024 (Some Concerns)** | | |
| **Project Mode** | Primary: Mixed Total of Modes: 3 | | |
| **Project Type** | Sponsored Projects | | |
| **Budget** | **Direct Budget**: 15,740,049.00 | **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 - 12/2025 | | |
| **Data Col Period** | 05/2024 - 08/2025 | | |
| **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:*** 08/30/2025 |

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|---|---|
| **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)<br><br>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 |

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|---|---|---|
| **Report Period** | May, 2025 (HRS 2024) | Implementing |
| **Risk Level** | Some Concerns | |
| **Monthly Updates** | -HRS 2024 activities continued with cost projections, payment processing, letter request processing, endgame | |

mailings, coding, and logging activities.
-The PIs reviewed the cost estimate for extending the field period, along with information on the viability of the sample/level of effort remaining, and decided to extend data collection until the end of August.
-Five interviewers moved from HRS 2022 to HRS 2024.
-Interviewers exceeded hours projections every week of May except for the last week. This is most likely due to the holiday weekend. Interviewers were above the interview goal every week in May. HPI was slightly higher than projected for three weeks and lower than projected for two weeks. In addition, 53 web self interviews were completed during the month.
- Current Field Strategies:
1. Prioritization based on Influence Measure (IM)
2. Mode switch to TEL for all pref mode FTF cases
2. Mode switch to TEL for eFTF cases that have reached 6+ attempts
3. End game offer implemented on 4/14/25. HRS PIs assigned eligibility flag for the web sweep protocol to 2963 Rs from 2034 HHs. Households in which at least 1 R had that reach 12+ attempts are randomized at 50% fraction into either 1) a Web Iw offer, or 2) field interviewer offer increased incentive endgame protocol. All groups were split 50-50 and offered either $100 or $150 to compete the interview. All flagging was done at the household level.

Measures in table below are as of 6/14/25 (week 57).

| | | |
|---|---|---|
| **Special Issues** | | |
| **Cost as of Jun 17, 2025** | ***Total Cost to Date (direct + indirect):*** | 17,897,679.22 |
| | ***Est Cost at Completion (E$AC):*** | 20,564,444.21 |
| | ***Total Budget:*** | 21,406,468.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 842,023.79 |
| | ***Reason for Variance:*** | Projections have been updated in CRS to reflect the May 28 decision by HRS PIs to extend the HRS 2024 field period to August 30th. |
| **Projections as of Jun 17, 2025** | ***Dollars Projected for Month:*** | 1,280,314.26 |
| | ***Actual Dollars Used:*** | 1,187,883.16 |
| | ***Variance (Projected minus Actual):*** | 92,431.10 |
| | ***Reason for Variance:*** | Variance is primarily due to non-salary categories for Services of Others (DataForce) and interviewer bonuses, as well as a few salary categories, such as fewer hours than projected charged by SurveyTechs. |

**Measures**

| | Units at Complete | RR | HPI |
|---|---|---|---|
| ***Current Goal:*** | 13,480 | 59.1% | 10.0 |
| ***Goal at Completion:*** | 15,802 | 70%* | 9.3 |
| ***Current Actual:*** | 13,851 | 60.8% | 10.0 |
| ***Estimate at Complete:*** | 14,838** | 66%** | 10.4** |
| ***Variance:*** | 964 | 4% | -1.1 |

**Other Measures**

*Budgeted goal RR: 70% RR
**Based on ending data collection on 8/30/2025

| | | | |
|---|---|---|---|
| **Project Name** | **(HRS2022-Screening) HRS 2022 - Screening (On Track)** | | |
| **Project Mode** | Primary: Face to Face Secondary: Telephone Total of Modes: 3 | | |
| **Project Type** | Sponsored Projects | | |
| **Budget** | **Direct Budget**: 21,264,149.00 | **Indirect Budget:** 7,655,093.00 | **Total Budget:** 28,919,242.00 |
| **Principal** | David Weir (SRC) | | |
| **Investigator/Clients** | Helen Levy (SRC) | | |
| | Ken Langa (SRC) | | |
| **Funding Agency** | | | |
| **IRB** | ***HUM#:*** | | ***Period of Approval:*** |
| **Project Team** | ***Project Lead:*** Evanthia Leissou | | |
| | ***Budget Analyst:*** Richard Warren Krause | | |
| | ***Production Manager:*** | | |
| | ***Senior Project Advisor:*** Nicole G Kirgis | | |
| | ***Production Manager 1:*** Andrew L Hupp | | |
| | ***Production Manager 2:*** Theresa Camelo | | |
| **Proposal #** | no data | | |
| **Description** | The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample. | | |
| **SRO Project Period** | 02/2021 - 08/2025 | | |
| **Data Col Period** | 03/2022 - 07/2025 | | |
| **Security Plan** | NA | | |

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

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

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| | | |
|---|---|---|
| **Report Period** | May, 2025 (HRS2022-Screening) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | Screening continues at a steady pace. We have been largely above projections in 2025.<br>01/05/25 - 06/14/25<br>Hours projected: 23,528<br>Hours worked: 24,830 (106%)<br><br>Screening goal: 6,639<br>Screening actual: 8,823 in-person (133%) + 1,152 web | |

| | | |
|---|---|---|
| | We have released 28,853 cases to the endgame protocol. 2,297 cases (8.0%) of cases have completed a screener. 250 cases (10.9%) completed via the web, and 2,049 (89.2%) of cases completed in-person. Flagging of endgame cases continues. | |
| **Special Issues** | | |
| **Cost as of Jun 13, 2025** | ***Total Cost to Date (direct + indirect):*** | 33,901,507.99 |
| | ***Est Cost at Completion (E$AC):*** | 34,881,299.89 |
| | ***Total Budget:*** | 28,919,242.00 |
| | ***Variance (Total Budget minus- E$AC):*** | -5,962,057.89 |
| | ***Reason for Variance:*** | Projections have been entered through July 2025 (projection of when we would meet the baseline production goal). |
| **Projections as of Jun 13, 2025** | ***Dollars Projected for Month:*** | 793,029.98 |
| | ***Actual Dollars Used:*** | 793,100.31 |
| | ***Variance (Projected minus Actual):*** | -70.33 |
| | ***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:*** | 8,334/3,890 | 53.9% | 2.87 |
| | ***Estimate at Complete:*** | | | |
| | ***Variance:*** | | | |

**Other Measures**

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

| **Milestones** | | |
|---|---|---|
| | ***Pre Production Start:*** 09/01/2023 | ***Pretest Start:*** |
| | ***Pretest End:*** | ***Recruitment Start:*** |
| | ***Staffing Complete:*** | ***GIT Start:*** |
| | ***SS Train Start:*** | ***SS Train End:*** |
| | ***DC Start:*** 10/05/2023 | ***DC End:*** 02/29/2024 |

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

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|---|---|---|
| **Report Period** | May, 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 Jun 17, 2025** | ***Total Cost to Date (direct + indirect):*** | 262,548.92 |
| | ***Est Cost at Completion (E$AC):*** | 262,548.92 |
| | ***Total Budget:*** | 505,359.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 242,810.08 |
| | ***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 Jun 17, 2025** | ***Dollars Projected for Month:*** | 0.00 |
| | ***Actual Dollars Used:*** | 3.17 |
| | ***Variance (Projected minus Actual):*** | -3.17 |
| | ***Reason for Variance:*** | Small transfer |

**Measures**

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

| | |
|---|---|
| **Other Measures** | N/A |

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

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

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|---|---|
| **Other Project Team Members** | Gary Hein: Project Lead<br>Cindy Tsao: Budget Analyst<br>Vanessa Clarke: Project Assistant<br>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 |

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|---|---|---|
| **Report Period** | May, 2025 (LHMS 2023 Spring) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | May Activities and Notable Events for Spring and Fall: | |

| | | |
|---|---|---|
| | 1 - Monthly budget projection meeting with financial analyst<br>2 - LHMS update meeting with HRS staff<br>3 - Coding by SRO Staff | |
| **Special Issues** | Finance wants to bill current/future fall activities to the spring shortcode | |
| **Cost as of Jun 17, 2025** | ***Total Cost to Date (direct + indirect):*** | 238,900.68 |
| | ***Est Cost at Completion (E$AC):*** | 255,207.73 |
| | ***Total Budget:*** | 457,922.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 202,714.27 |
| | ***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 Jun 17, 2025** | ***Dollars Projected for Month:*** | 2,683.42 |
| | ***Actual Dollars Used:*** | 2,134.72 |
| | ***Variance (Projected minus Actual):*** | 548.70 |
| | ***Reason for Variance:*** | Staff coding hours lower 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** | **(LHMS 2025 Spring) Life History Mail Study Spring 2025 (On Track)** | | |
| **Project Mode** | Primary: Mail Secondary: Web Total of Modes: 2 | | |
| **Project Type** | Sponsored Projects | | |
| **Budget** | **Direct Budget**: 358,193.00 | **Indirect Budget:** 200,588.00 | **Total Budget:** 558,781.00 |
| **Principal** | David Weir (SRC) | | |
| **Investigator/Clients** | Jacqui Smith (SRC) | | |
| | Brady West (SRC) | | |
| **Funding Agency** | NIH | | |
| **IRB** | ***HUM#:*** HUM00246463 | | ***Period of Approval:*** 5/28/2025-5/27/2026 |
| **Project Team** | ***Project Lead:*** Gary Hein | | |
| | ***Budget Analyst:*** Cindy Tsao | | |
| | ***Production Manager:*** | | |
| | ***Senior Project Advisor:*** Evanthia Leissou | | |
| | ***Production Manager 1:*** Chelsea Graham | | |
| | ***Production Manager 2:*** | | |
| **Proposal #** | no data | | |
| **Description** | LHMS is part of the Health and Retirement Study (HRS). The goal of LHMS is to give participants an opportunity to share significant events that shaped their lives, reflect on their life history and share where they have lived, went to school, and what important events occurred in their lives. Information like this allows researchers to understand how individuals' pasts shape their health and economic situations today.<br><br>In June 2025, a paper questionnaire and a $25 check as a token of appreciation will be mailed to a sample of approximately 3600 HRS Respondents. From this sample, approximately 1509 completed surveys are expected (44% response rate). For the reminder protocol, all respondents will receive a reminder mailing that includes the paper questionnaire, and a reminder postcard. Approximately 400 respondents will be mailed an invitation to take the survey over the web. The survey will be programmed in Blaise and managed in WSMS. The web reminder protocol consists of a reminder email (when email address is available), packet with paper SAQ, and a postcard. | | |
| **SRO Project Period** | 03/2025 - 12/2025 | | |
| **Data Col Period** | 06/2025 - 09/2025 | | |
| **Security Plan** | NA | | |
| **Milestones** | ***Pre Production Start:*** 03/01/2025 | ***Pretest Start:*** | |
| | ***Pretest End:*** | ***Recruitment Start:*** | |
| | ***Staffing Complete:*** | ***GIT Start:*** | |
| | ***SS Train Start:*** | ***SS Train End:*** | |
| | ***DC Start:*** 06/30/2025 | ***DC End:*** 09/30/2025 | |
| **Other Project Team Members** | Gary Hein: Project Lead<br>Cindy Tsao: Budget Analyst<br>Chelsea Graham: Project Assistant<br>Carolyn Viera Martinez: Coding Lead | | |
| **Other Project Name** | LHMS Spring | | |
| **Sample Mgmt System** | Project specific system (WSMS) | | |
| **Data Col Tool** | Blaise 4.8; SAQ | | |
| **Hardware** | Desktop; Paper and Pencil | | |
| **DE Software** | Other (Weblog) | | |
| **QC Recording Tool** | N/A | | |
| **Incentive** | Yes, R | | |
| **Administration** | SRO Group | | |
| **Payment Type** | Check, prepaid ($25) | | |
| **Payment Method** | Check through STrak RPay System | | |

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|---|---|---|
| **Report Period** | May, 2025 (LHMS 2025 Spring) | Implementing |
| **Risk Level** | On Track | |

| | | |
|---|---|---|
| **Monthly Updates** | LHMS 2025 Spring Activities for May:<br><br>1- Created materials and drafted language for IRB application.<br>2- Technical development (meetings/programming/testing/reporting) for Pen/Paper SAQ (Weblog/Webtrak) and Web (WSMS, Blaise) modes<br>3- Weekly LHMS Web development meeting with HRS tech team<br>4- Monthly LHMS update meeting with HRS leadership<br>5- Monthly SRO budget meeting<br>6- Meetings with Dataforce to discuss mailing/data collection protocols and project related costs | |
| **Special Issues** | | |
| **Cost as of Jun 17, 2025** | ***Total Cost to Date (direct + indirect):*** | 28,193.54 |
| | ***Est Cost at Completion (E$AC):*** | 547,243.80 |
| | ***Total Budget:*** | 558,781.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 11,537.20 |
| | ***Reason for Variance:*** | High usage staff (SSS, SSI) have slightly lower rate than budgeted. |
| **Projections as of Jun 17, 2025** | ***Dollars Projected for Month:*** | 37,401.15 |
| | ***Actual Dollars Used:*** | 22,164.52 |
| | ***Variance (Projected minus Actual):*** | -15,236.63 |
| | ***Reason for Variance:*** | Technical and development hours not hitting until June. Hours pushed forward. |

**Measures**

| | Units at Complete | RR | HPI |
|---|---|---|---|
| ***Current Goal:*** | 1658 | 44% | N/A |
| ***Goal at Completion:*** | 1658 | 44% | N/A |
| ***Current Actual:*** | N/A | N/A | N/A |
| ***Estimate at Complete:*** | 1658 | 44% | N/A |
| ***Variance:*** | 0 | 0 | N/A |

**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** | 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.<br>It is based on two interconnected series of surveys using nationally representative samples:<br>(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).<br>(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.<br>Press releases and published results can be found here.. http://www.monitoringthefuture.org/ | | |
| **SRO Project Period** | 04/2022 - 03/2027 | | |
| **Data Col Period** | 04/2022 - 03/2027 | | |
| **Security Plan** | Yes | | |
| **Milestones** | ***Pre Production Start:*** | ***Pretest Start:*** | |
| | ***Pretest End:*** | ***Recruitment Start:*** | |
| | ***Staffing Complete:*** | ***GIT Start:*** | |
| | ***SS Train Start:*** | ***SS Train End:*** | |
| | ***DC Start:*** | ***DC End:*** | |
| **Other Project Team Members** | Hueichun Peng Technical Lead (WebSMS and Qualtrics programmer)<br>Ed Green (+Brad Goodwin) Data Management<br>Ashwin Dey SurveyTrak, WebTrak and MTF specific Apps. Programmer<br>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 | | |

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| **Report Period** | May, 2025 (MTF Base Year 2022_27) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | May 2025<br>The 2025 wave of data collection concluded on 6/3.<br>In total, 24,484 students completed the MTF survey with an overall response rate of 81% - response varied, as usual, by grade (8th 86%, 10th 82% and 12th 76%).<br>The number of schools completed this year is 276 which was lower than last year (n=286). It seems like there are a few factors that affected response, including; some hesitation at the district and school level to participate to avoid any unwanted attention or repercussions.<br>This year the MTF team trialed some newly designed recruitment materials - they will continue to experiment next wave with different designs/text. The PI is also keen to increase the team of recruiters so they can make more calls to schools and start with a larger pool of approved schools.<br>The HPI (per school) is slightly higher than last year - 23.6 compared to 21.2 last year. The reason for the higher HPI could be due to a number and mix of a few factors:<br>- higher number of interviewers than recent years and higher proportion of new to MTF interviewers.<br>- during our first week of data collection the HPI was very high due to numerous postponed school visits due to the weather - one school was completed that week at a HPI of 295 hours. We didn't really begin data collection fully until the following week.<br>- Interviewers made more face to face visits to hard to reach schools this year than last.<br>- One of the reasons for staffing more interviewers this year was to enable us to provide more 'assistants' to the lead interviewer at larger schools. This was particularly important in the 12th grade schools where cards and pencils are distributed at the beginning of the session. In schools that are administering the survey in classes it is important to have the assistants to help introduce the survey and talk about the 'login cards' which are also used to collect contact details for students. We assigned assistants at more schools and a greater number at those schools - another factor that could have contributed to a higher HPI.<br>- Interviewers may have been assigned fewer schools (on average).<br>I plan to investigate each possible source of the increased HPI and will provide my findings.<br>We are currently preparing for the FTF school recruitment effort that will begin late July (four interviewers). The MTF full Base Year will begin pre-production for the next wave in late August. | |

**Special Issues**

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| **Cost as of Jun 17, 2025** | ***Total Cost to Date (direct + indirect):*** | 4,257,848.08 |
| | ***Est Cost at Completion (E$AC):*** | 6,950,351.32 |
| | ***Total Budget:*** | 9,778,060.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 2,827,708.68 |
| | ***Reason for Variance:*** | Projections for Funding period 2022 – 2027 (latest client report has been uploaded to MPR)<br>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.<br>Primary reason for the under spend and plans for SRO funding:<br>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).<br>In response, MTF (SRC) have reduced our funding for the first two years. We have received (from MTF) $1,843,080 (Y1) and $1,143,890 (Y2) a total reduction of $815,581. Going forward, the current plan is to fund Year 3 and 4 based on the budgeted amount - if there is significant underspending MTF will reduce SRO's Year 5 award. SRO Finance group feels that we should continue to report/monitor using the original budgeted amount because this is not an official reduction in budget. We are keeping the client (via Nick Prieur) informed of actual and projected spend through a monthly cost report. |
| **Projections as of Jun 17, 2025** | ***Dollars Projected for Month:*** | 298,713.34 |
| | ***Actual Dollars Used:*** | 303,491.35 |

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| | ***Variance (Projected minus Actual):*** | -4,778.01 |
| | ***Reason for Variance:*** | Variance was quite low and a mix of salary and non-salary. |

| **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** | 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.<br><br>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).<br><br>Consent process<br>- Parents were mailed a letter with a link to a consent document in Qualtrics.<br>- After receiving parental consent, students were contacted so,<br>- Students on individual schedule, programmed in WebSMS<br><br>Data Collection<br>- Invitation email<br>- followed by two reminders, 2 weeks apart if needed. Each student was on his/her own schedule based on when parental permission was received.<br><br>Plan for Future<br>- Two more years of data collection<br>Year Recruited Follow-Up<br>2023 2024, 2025<br>2024 2025, 2026 | | |
| **SRO Project Period** | 07/2023 - 12/2025 | | |
| **Data Col Period** | 04/2024 - 08/2025 | | |
| **Security Plan** | NA | | |
| **Milestones** | ***Pre Production Start:*** | ***Pretest Start:*** | |
| | ***Pretest End:*** | ***Recruitment Start:*** | |
| | ***Staffing Complete:*** | ***GIT Start:*** | |
| | ***SS Train Start:*** | ***SS Train End:*** | |
| | ***DC Start:*** | ***DC End:*** | |
| **Other Project Team Members** | Rebecca Gatward (SPA), Donnalee Grey-Farquharson (Lead), Hueichun Peng, Shaowei Sun, Hongyu Johnson, Brad Goodwin, Edward Green | | |
| **Other Project Name** | | | |
| **Sample Mgmt System** | Web SMS | | |
| **Data Col Tool** | Other (Qualtrics) | | |
| **Hardware** | NA | | |
| **DE Software** | NA | | |
| **QC Recording Tool** | NA | | |
| **Incentive** | Yes, R | | |
| **Administration** | ISR Group (MTF Staff) | | |

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

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| **Report Period** | May, 2025 (MTF Early Panel Pilot) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | The current wave of 2025 data collection started on April 10. SRO team completed system testing and survey testing for the MTF research team before launching the production on time. We send the survey to the student once we receive the parent consent. We have a total of 30 parental consents in this wave. As of 5/31/2025, 8 students have completed the survey. | |

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| **Special Issues** | | | |
| **Cost as of May 31, 2025** | ***Total Cost to Date (direct + indirect):*** | | 184,562.81 |
| | ***Est Cost at Completion (E$AC):*** | | 284,758.39 |
| | ***Total Budget:*** | | 288,529.00 |
| | ***Variance (Total Budget minus- E$AC):*** | | 3,770.61 |
| | ***Reason for Variance:*** | Staff have not charged full projected hours. | |
| **Projections as of May 31, 2025** | ***Dollars Projected for Month:*** | | 8,903.15 |
| | ***Actual Dollars Used:*** | | 8,786.72 |
| | ***Variance (Projected minus Actual):*** | | 116.43 |
| | ***Reason for Variance:*** | A total of small variances in the projected hourly rates and what actually hits. | |

| **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 Panel 2022-27) Monitoring the Future Panel 2022-2027 (On Track)** | | |
| **Project Mode** | Primary: Web Secondary: Telephone Total of Modes: 2 | | |
| **Project Type** | Sponsored Projects | | |
| **Budget** | **Direct Budget**: 2,496,935.00 | **Indirect Budget:** 1,398,282.00 | **Total Budget:** 3,895,217.00 |
| **Principal Investigator/Clients** | Megan Patrick (UM-SRC) | | |
| **Funding Agency** | | | |
| **IRB** | ***HUM#:*** 00217920 | | ***Period of Approval:*** |
| **Project Team** | ***Project Lead:*** Donnalee Ann Grey-Farquharson | | |
| | ***Budget Analyst:*** Dean E Stevens | | |
| | ***Production Manager:*** Lloyd Fate Hemingway | | |
| | ***Senior Project Advisor:*** Rebecca Gatward | | |
| | ***Production Manager 1:*** | | |
| | ***Production Manager 2:*** Hongyu Johnson | | |
| **Proposal #** | no data | | |
| **Description** | Since 1975 the MTF survey has measured drug and alcohol use and related attitudes among adolescent students nationwide. A nationally representative sample of survey participants report their drug use behaviors across three time periods: lifetime, past year, and past month. The survey is funded by the NIDA, a component of the National Institutes of Health (NIH), and conducted by the University of Michigan. MTF has two linked projects, MTF Main surveys students in schools, and MTF Panel surveys adults across the lifespan.<br><br>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.<br><br>During 2024 data collection wave, we have 10 survey forms that was reduced from 12 from the previous year.<br><br>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. | | |
| **SRO Project Period** | 01/2022 - 03/2027 | | |
| **Data Col Period** | 04/2022 - 10/2026 | | |
| **Security Plan** | NA | | |
| **Milestones** | ***Pre Production Start:*** | ***Pretest Start:*** | |
| | ***Pretest End:*** | ***Recruitment Start:*** | |
| | ***Staffing Complete:*** | ***GIT Start:*** | |
| | ***SS Train Start:*** | ***SS Train End:*** | |
| | ***DC Start:*** | ***DC End:*** | |
| **Other Project Team Members** | Rebecca Gatward (SPA), Donnalee Grey-Farquharson, Lloyd Hemingway, Dave Dybicki, Max Malholtra, Hueichun Peng, Shaowei Sun, Peter Sparks, Ashwin Dey, Hongyu Johnson, Brad Goodwin, Edward Green. | | |
| **Other Project Name** | MTF | | |
| **Sample Mgmt System** | Web SMS | | |
| **Data Col Tool** | Other (Qualtrics) | | |
| **Hardware** | NA | | |
| **DE Software** | NA | | |
| **QC Recording Tool** | NA | | |
| **Incentive** | Yes, R | | |
| **Administration** | ISR Group (MTF Staff) | | |
| **Payment Type** | Check, prepaid; Check, post | | |
| **Payment Method** | Other (MTF Staff mails check) | | |

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|---|---|---|
| **Report Period** | May, 2025 (MTF Panel 2022-27) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | We started the 2025 data collection on April 10, 2025. The SRO team continues to meet with the research team weekly to discuss production updates and resolve issues. Training for NR calling is done and NR calling is in progress.<br><br>The MTF Regular panel has a total of 18195 (includes 120 cases that have been found after several years of non-participation) sample cases. We released 7 replicas in different schedules. As of 5/31/2025, there are 7931 completes (RR: 43.59%). | |
| **Special Issues** | | |
| **Cost as of May 31, 2025** | ***Total Cost to Date (direct + indirect):*** | 2,378,894.96 |
| | ***Est Cost at Completion (E$AC):*** | 3,961,872.79 |
| | ***Total Budget:*** | 3,895,217.00 |
| | ***Variance (Total Budget minus- E$AC):*** | -66,655.79 |
| | ***Reason for Variance:*** | We removed projections for Illume survey charges which reduced the overrun. MTF staff are aware of the overrun. |
| **Projections as of May 31, 2025** | ***Dollars Projected for Month:*** | 62,423.60 |
| | ***Actual Dollars Used:*** | 55,241.60 |
| | ***Variance (Projected minus Actual):*** | 7,182.00 |
| | ***Reason for Variance:*** | SurveyTech hours were less than projected. |

| **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** | **(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** | 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.<br>SRO's work is associate with Cores 2 and 4. | | |
| **SRO Project Period** | 10/2023 - 09/2028 | | |
| **Data Col Period** | | | |
| **Security Plan** | NA | | |

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

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| **Other Project Team Members** | Lisa Holland, Raphael Nishimura, Ji Qi, AB Fuqua-Smith, Liliana Grueber, Jackson Collier, Margaret Hudson (until Jan 2025) |
| **Other Project Name** | |
| **Sample Mgmt System** | NA |
| **Data Col Tool** | NA |
| **Hardware** | NA |
| **DE Software** | NA |
| **QC Recording Tool** | NA |
| **Incentive** | NA |
| **Administration** | NA |
| **Payment Type** | NA |
| **Payment Method** | NA |

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|---|---|---|
| **Report Period** | May, 2025 (NDWS) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | April activities:<br>* Related to Wave 1 (concluded March 2025): we completed weighting and are working with the PI team and disclosure analysts and SRO TSG Data Ops + PDMG to prepare Wave 1 final datasets for release (including weights, annotations, codebooks, and other documentation). The release will include a restricted use file which will be released via Linkage / Acumen / NIA enclave platform and a public use file which will be released via NACDA Open Aging Repository.<br><br>* Related to Wave 2 (May - December 2025): We continue preparing for the NDWS Wave 2 data collection. SRO assistance involves survey speccing and testing, reviewing data collection recruitment materials, preparing Wave 2 PI reports, and assisting with IRB submission. Wave 2 data collection started on May 12 with Assisted Living and Nursing Home facility recruitment. Community Clinicians and Home Care recruitment will start in June.<br><br>* Related to Wave 3: we worked with PIs and vendors to define W3 scope and review W3 vendor budgets. We also submitted W3 SRC/SRO budgets. 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. | |
| **Special Issues** | | |
| **Cost as of May 31, 2025** | ***Total Cost to Date (direct + indirect):*** | 1,299,635.68 |
| | ***Est Cost at Completion (E$AC):*** | 6,494,708.30 |
| | ***Total Budget:*** | 6,750,973.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 256,264.70 |
| | ***Reason for Variance:*** | We are working on reducing underrun by projecting new staff to accommodate additional work expected through end of 2024 NIA fiscal year (August) and in Year 3 Sep 2025 - Aug 2026. |
| **Projections as of May 31, 2025** | ***Dollars Projected for Month:*** | 120,505.15 |
| | ***Actual Dollars Used:*** | 100,128.56 |
| | ***Variance (Projected minus Actual):*** | 20,376.59 |
| | ***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** | **(NYCHVS) New York City Housing and Vacancy Survey (On Track)** | | |
| **Project Mode** | Primary: Face to Face | | |
| **Project Type** | Sponsored Projects | | |
| **Budget** | **Direct Budget**: 9,926,188.00 | **Indirect Budget:** 3,573,427.00 | **Total Budget:** 13,499,615.00 |
| **Principal** | Elyzabeth Gaumer, PI (NYC Housing Preservation Dept ) | | |
| **Investigator/Clients** | Daniel Goldstein, Co-PI (NYC Housing Preservation Dept ) | | |
| | Caitlin Waickman, Co-PI (NYC Housing Preservation Dept ) | | |
| **Funding Agency** | | | |
| **IRB** | ***HUM#:*** | | ***Period of Approval:*** |
| **Project Team** | ***Project Lead:*** Maureen Joan O'Brien | | |
| | ***Budget Analyst:*** William Lokers | | |
| | ***Production Manager:*** Theresa Camelo | | |
| | ***Senior Project Advisor:*** Stephanie A Chardoul | | |
| | ***Production Manager 1:*** Saray Gonzalez | | |
| | ***Production Manager 2:*** | | |
| **Proposal #** | no data | | |
| **Description** | The New York City Housing and Vacancy Survey (NYCHVS) is a citywide survey designed to be representative of the NYC housing stock and community-dwelling population. The NYCHVS has been conducted by the City of New York since 1965 and is the longest running housing survey in the country. The survey is mandated by New York State and New York City laws to measure the net rental vacancy rate and describe the supply, condition, and continued need for rent control and rent stabilization which covers half of the city's rental housing or about 1 million apartments and 2.5 million tenants. The 2026 NYCHVS will be the 20th survey cycle. Microdata are publicly available and facilitate a variety of analyses on the housing supply, demographic change, economic conditions, and the context for various public policies and programs. | | |
| **SRO Project Period** | 01/2025 - 06/2028 | | |
| **Data Col Period** | 02/2026 - 08/2026 | | |
| **Security Plan** | NA | | |

| **Milestones** | | |
|---|---|---|
| | ***Pre Production Start:*** 01/15/2025 | ***Pretest Start:*** |
| | ***Pretest End:*** | ***Recruitment Start:*** 10/01/2025 |
| | ***Staffing Complete:*** 11/20/2025 | ***GIT Start:*** 01/18/2026 |
| | ***SS Train Start:*** 01/19/2026 | ***SS Train End:*** 01/29/2026 |
| | ***DC Start:*** 02/01/2026 | ***DC End:*** 08/31/2026 |

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| **Other Project Team Members** | |
| **Other Project Name** | New York City Housing and Vacancy Survey |
| **Sample Mgmt System** | MSMS |
| **Data Col Tool** | Blaise 5 |
| **Hardware** | Laptop; [UM cell] Phone |
| **DE Software** | N/A |
| **QC Recording Tool** | NA |
| **Incentive** | Not used |
| **Administration** | NA |
| **Payment Type** | N/A |
| **Payment Method** | N/A |

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|---|---|---|
| **Report Period** | May, 2025 (NYCHVS) | Planning |
| **Risk Level** | On Track | |
| **Monthly Updates** | The PIs have proposed adding admnistrative utility use data collection for addesses that are interviewed. They are looking at a single data source through the state of New York. It is not yet known how the collection will happen, who will do the linkage, and when this data will be requested. Additionally, we may need to add a consent form for this, when we were not planning on consenting. We will continue to work these details through with the PI group.<br><br>Sampling:<br>A sampling time has been proposed to the PI group, and they have agreed to it. Extra time was built into the | |

timeline for QC of the selected buildings and purchased addresses. The sampling team is thinking about different ways to calculate design effects and is making progress.

Recruitment & Hiring:
The mgt team has been meeting with the DCS team to discuss recruitment strategies and timeline. SRO will provide screening criteria to HPD to share with CUNY by the end of this week. Details about when the 'hand off' will occur are still being worked out. We also need to determine who will conduct the language certifications in the 7 formal languages. We are working through the initial language certification which could be very expensive, and are exploring ways to decrease this cost.

Training:
The current training plan is to hold two trainings, back to back at about 4 days each, in NYC. Iwers will travel to the training daily. Part of GIT and some core training sessions will be held via Zoom 'live' sessions to minimize the number of days needed in person, as the PI has concerns about Iwer's ability to attend a multi-day training, in person. We are exploring the use of interactive videos for Home Study with built in Q&A. We are reviewing curricula from previous waves of data collection and preparing a training session overview for the PI team to review. We will identify which sessions would be appropriate for Zoom, and create an agenda. We will also create a 'Course Catalog' of required GIT and Core Sessions in which Iwers can sign up for a time that best fits with their schedule. The team is considering that these sessions will be live, and occur during the 2 weeks leading up to training when time will be very tight.

Laptops will be shipped to HPD prior to Home Study/GIT/Study Specific Core Sessions, for iwer use during these sessions. Iwers will pick up laptops at a pre-training Registration session. Iwers may also pick up their article of clothing and other necessary training materials at this time as well.

We are discussing logos for Iwer materials, recruitment materials, and Iwer swag. Laptop bags and Iwer clothing will be ordered by HPD and have both U-M and HPD logos. Final versions will need to be approved by the U-M Branding Dept.

Blaise:
Blaise programming has been underway since late May. We are starting with English, then the other 6 languages. HPD has secured staff to will test in all 7 languages. CTT testing will begin in late June.

Technical Systems:
MSMS spec and rules writing has not yet started, the Tech Lead is currently in MSMS training. At this point we expect that we should be on track. In the meantime the tech team has started meeting and putting together a tech timeline.

Other:
We are working with the RCT Team, the QC team, DCO, and CCP to determine how interactions with Rs who speak languages other than English and Spanish will occur, and the project is drafting for each type of interaction. RCT has identified strategies for forwarding voicemails via email to Iwers who speak the R's needed language. Project Field Leadership will identify an Iwer for each of the 7 formal language who can receive and triage these voicemail emails. We are discussing options for handling calls from R's who speak languages outside the 7, perhaps using Google Translate offline to determine the language spoken, then triaging with a project manager/production manager to identify an Iwer who speaks that language. In addition, the language protocol will include steps for interviewing a R who does not speak one of the 7 formal languages. Some tasks will likely require a professional interpreter/translation service and the team is exploring options for this.

The HPD press release should be going out soon.

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|---|---|---|---|
| **Special Issues** | The iw will be formally conducted in 7 languages. QC and RCT follow-up protocols will be determined. In addition to the 7 lang, we will need to be prepared to interveiw in any language the R speaks. The PI team has stated that an interview has never been conducted in a language that was not listed on their laminated Language Card (n=60 languages), and most times an Iwer has been staffed who spoke the language. | | |
| **Cost as of Jun 09, 2025** | ***Total Cost to Date (direct + indirect):*** | | 31,516.39 |
| | ***Est Cost at Completion (E$AC):*** | | 13,104,224.67 |
| | ***Total Budget:*** | | 13,499,615.00 |
| | ***Variance (Total Budget minus- E$AC):*** | | 395,390.33 |
| | ***Reason for Variance:*** | Have not entered all non-salary projections yet. | |
| **Projections as of Jun 09, 2025** | ***Dollars Projected for Month:*** | | 39,575.07 |
| | ***Actual Dollars Used:*** | | 31,516.39 |
| | ***Variance (Projected minus Actual):*** | | 8,058.68 |
| | ***Reason for Variance:*** | Staff salary projections are still being refined. | |

| Measures | | Units at Complete | RR | HPI |
|---|---|---|---|---|
| | ***Current Goal:*** | | | |
| | ***Goal at Completion:*** | 10,650 | 71% | 9.0 |
| | ***Current Actual:*** | | | |
| | ***Estimate at Complete:*** | | 71% | |
| | ***Variance:*** | | | |

**Other Measures**

| | |
|---|---|
| **Project Name** | **(PR-PSID) Puerto Rico Panel Study of Income Dynamics (Some Concerns)** |
| **Project Mode** | Primary: Face to Face Secondary: Telephone Total of Modes: 2 |
| **Project Type** | Sponsored Projects |
| **Budget** | **Direct Budget**: 828,581.00 **Indirect Budget:** 464,004.00 **Total Budget:** 1,292,585.00 |
| **Principal** | Narayan Sastry (University of Michigan) |
| **Investigator/Clients** | Elizabeth Fussel (Brown University) |
| **Funding Agency** | NICHD, with supplemental funding being sought from NIA |
| **IRB** | ***HUM#:*** HUM00197300 ***Period of Approval:*** 4/5/2022-3/22/24 |
| **Project Team** | ***Project Lead:*** Camila Kendall |
| | ***Budget Analyst:*** Ivanna Iavorska-Em |
| | ***Production Manager:*** |
| | ***Senior Project Advisor:*** Stephanie A Chardoul |
| | ***Production Manager 1:*** Camila Kendall |
| | ***Production Manager 2:*** |
| **Proposal #** | no data |
| **Description** | SRO will work with the PIs and a local survey firm in Puerto Rico, Estudios Técnicos (ETI), to develop a sample frame, sample design, questionnaire and data collection protocols for both pilot data collection (in 2022) and baseline data collection (in 2023). DMSS will provide assistance with sample design and implementation, responsive design, panel maintenance issues, and creation of sample weights. SRO will update the PSID-21 Spanish instrument for use specifically in PR. SRO will assist with the preparation of training materials for Listing training, Pretest and Main Data collection and will travel to PR to be on-site for these trainings. SRO will define reports for production and quality control monitoring that will be programmed through the SurveyTrak system, and train the research team on using these reports. All data will be collected by ETI's interviewers in PR and will be encrypted and transmitted daily via SurveyTrak to a secure SRC server. SRO will also assist with data processing. |
| **SRO Project Period** | 01/2022 - 12/2023 |
| **Data Col Period** | |
| **Security Plan** | NA |
| **Milestones** | ***Pre Production Start:*** 10/01/2021 ***Pretest Start:*** 02/05/2024<br>***Pretest End:*** 03/11/2024 ***Recruitment Start:***<br>***Staffing Complete:*** ***GIT Start:*** 01/30/2024<br>***SS Train Start:*** 01/31/2024 ***SS Train End:*** 02/02/2024<br>***DC Start:*** ***DC End:*** |
| **Other Project Team Members** | Shonda Kruger-Ndiaye & Camila Kendall -- Co-Project Leads<br>Raphael Nishimura -- Sampling<br>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)<br>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) |

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|---|---|---|
| **Report Period** | May, 2025 (PR-PSID) | Implementing |
| **Risk Level** | Some Concerns | |
| **Monthly Updates** | As of 6/20/25 our funding situation is still unsettled. We successfully completed the interviewer training per PI instruction. SRO was instructed to cease non-essential project charges after the training. In addition to funding, we | |

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|---|---|---|
| | have a Certificate of Confidentiality issue. Our CoC, which is referenced in our original IRB application, is now expired and NIH has paused the process whereby projects not funded by NIH can request a CoC. As of 6/19 we submitted an IRB ame requesting to proceed without a CoC if non-federal funding is secured to allow a launch.<br><br>SRO is maintaining a list of the steps necessary to launch the project once funding is secured.<br><br>Interviewer training was successful, with three SRO staff members traveling as trainers and one as tech support. | |
| **Special Issues** | Threat to Brown funding<br>Same as last month -- overrun and uncertainty around PCP work scope which is new to SRO. | |
| **Cost as of Jun 17, 2025** | ***Total Cost to Date (direct + indirect):*** | 809,153.86 |
| | ***Est Cost at Completion (E$AC):*** | 1,472,727.57 |
| | ***Total Budget:*** | 1,292,585.00 |
| | ***Variance (Total Budget minus- E$AC):*** | -180,142.57 |
| | ***Reason for Variance:*** | The main drivers of the total cost overrun remain: Management and Post Collection Processing. The Management overrun is due mostly to needing more hours than estimated. The PCP overrun is mostly a function of rate changes (the SS raises and a shift of these hours to later months). The projected cost to complete decreased since the April report. |
| **Projections as of Jun 17, 2025** | ***Dollars Projected for Month:*** | 52,876.16 |
| | ***Actual Dollars Used:*** | 56,915.70 |
| | ***Variance (Projected minus Actual):*** | -4,039.54 |
| | ***Reason for Variance:*** | The monthly overrun is due to DMSS hours that we didn't project and travel-domestic costs that hit in May instead of June. Our Spanish tester's hours were also higher than projected. |

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

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

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| **Other Project Team Members** | Shonda Kruger-Ndiaye -- PSID Suite Lead<br>Rachel Orlowski -- PSID Survey Director<br>Daric Throne -- MSMS Spec Lead<br>James Rodgers -- MSMS Lead<br>Karl Dinkelmann -- Blaise Lead<br>Jeffrey Smith -- TSG Lead<br>Jude Perillo -- Blaise Programmer<br>Darnell Christian -- MSMS Set Up Programmer<br>Edward Green -- Data Manager<br>Rose Zdybel -- Data Management Support<br>Laura Yoder -- Archiving<br>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 |

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|---|---|---|
| **Report Period** | May, 2025 (PSID 2025 OCU) | Closing |
| **Risk Level** | On Track | |
| **Monthly Updates** | Project was mostly archived in May. Final steps will happen in early June (once Karl returns). | |

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|---|---|---|
| | May cost report should be the final report. | |
| **Special Issues** | | |
| **Cost as of Jun 09, 2025** | ***Total Cost to Date (direct + indirect):*** | 77,693.28 |
| | ***Est Cost at Completion (E$AC):*** | 77,693.28 |
| | ***Total Budget:*** | 81,686.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 3,992.72 |
| | ***Reason for Variance:*** | Minimal work was on-going. Final actuals were very close to projections. |
| **Projections as of Jun 09, 2025** | ***Dollars Projected for Month:*** | 1,379.00 |
| | ***Actual Dollars Used:*** | 1,227.88 |
| | ***Variance (Projected minus Actual):*** | 151.12 |
| | ***Reason for Variance:*** | Actuals were very close to projections |

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

**Other Measures**

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

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

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|---|---|
| **Other Project Team Members** | Project Lead -- Camila Kendall<br>Field Production Management -- Sarah Crane & Barb Aghababian-Homburg<br>SSL Production Management Lead (Assembly & Logging) -- Carolyn Vierra-Martinez<br>SSL Production Management Support (Assembly & Logging) -- Ian Woods<br>Project Management Support -- Xiomara Lorenzo-Guerra, Nahid Sultana<br>Tech Lead -- Jeff Smith<br>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 |

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|---|---|---|
| **Report Period** | May, 2025 (PSID CDS23 Phase 2) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | IWER outreach ended on 1/31. Last consent follow up mailing was sent week of 5/27. Consent follow up concluded on 6/6.<br><br>Management and Data Management actuals were higher than projected due to time spent on WebLog QC and creating the manifest to QC physical report. This report was more complicated to create than anticipated since consents for the entire Family Unit were logged on an individual level. | |

PM team finished WebLog data QC. Conducting final QC of physical consent forms in June.

Final data delivery is scheduled for mid-July.

| | | |
|---|---|---|
| **Special Issues** | | |
| **Cost as of Jun 09, 2025** | ***Total Cost to Date (direct + indirect):*** | 1,412,186.74 |
| | ***Est Cost at Completion (E$AC):*** | 1,427,193.12 |
| | ***Total Budget:*** | 2,524,678.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 1,097,484.88 |
| | ***Reason for Variance:*** | This is the original June cost report - it does not contain updates to projections (added minimal hours for some management and TSG staff to close out project in July)<br><br>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, shorter production period, and lighter touch protocol. |
| **Projections as of Jun 09, 2025** | ***Dollars Projected for Month:*** | 19,888.60 |
| | ***Actual Dollars Used:*** | 24,641.31 |
| | ***Variance (Projected minus Actual):*** | -4,752.71 |
| | ***Reason for Variance:*** | Mgt and Data Mgt actuals were higher than projections |

| **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** | Tom Crossley (UM-SRC-PSID) | | |
| **Investigator/Clients** | 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** | 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.<br><br>Talk about ancillary studies here.<br><br>The 2023 waves of CDS and the Transition into Adulthood (TAS) will follow PSID Core data collection. CDS and TAS eligibility is dependent upon completion of PSID Core. | | |
| **SRO Project Period** | 03/2024 - 09/2026 | | |
| **Data Col Period** | 03/2025 - 12/2025 | | |
| **Security Plan** | NA | | |
| **Milestones** | ***Pre Production Start:*** 03/01/2024 | ***Pretest Start:*** 09/16/2024 | |
| | ***Pretest End:*** 10/06/2024 | ***Recruitment Start:*** | |
| | ***Staffing Complete:*** | ***GIT Start:*** | |
| | ***SS Train Start:*** 02/24/2025 | ***SS Train End:*** 06/10/2025 | |
| | ***DC Start:*** 03/10/2025 | ***DC End:*** 12/31/2025 | |
| **Other Project Team Members** | TSG Tech Leads - Jim Rodgers, Jeff Smith, & Karl Dinkelmann; Data Manager - Brad Goodwin & Ed Green; 68ID Site Programmer - Ashwin Dey & 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** | May, 2025 (PSID25) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | Summary of April 2025 activities:<br><br>MSMS - Began identifying cases that were being completed and in a 1001 state, but were still being flagged as Review Wrong Age Name (RWAN). When an R is kicked out of the Blaise instrument for any reason, there is a 1 minute - 1.5 minute long delay before Blaise data is packaged up, received by MSMS, and then the line is locked. During that delay period, an R could re-enter the web instrument and try again. We have seen that this is what is happening, and it has resulted in some suspicious cases. RWAN investigations began this month in an effort to identify suspicious cases, and determine if anything could be done within the Blaise instrument to trigger RWAN locking processes more quickly. MSMS project updated occurred this month on 5/5, 5/12, and 5/20. These were very quick-paced release schedules that largely focused on Spanish Template releases to the field. Anticipate all remaining templates to be released by end of June. Began prepping this month for Training 3, the largest of the PSID trainings this year. Process for new users largely ironed out, and releasing lines was smoothly executed. Initial splitoffs were released in Prod successfully, with future releases growing in size. An effort was put forward to begin catching up pending splitoff reviews. Some cases were identified as having completed by Web, but then later also completed by a CATI launch. Investigations show some Sync issues, and reminds us that an async project like PSID could always see something like this. Worked with Study Staff to determine true final status of these cases. All remaining sample was released this month.<br><br>Blaise - No major updates were released this month. Most work relating to Blaise focused on refining QC processes. In particular QC on payment issues, FPS differences, RWAN, GDPR cases, and RWAN cases were given more attention. Consequential cases work was further refined and worked out with PSID study staff so that both team were able to more effectively monitor QC items as they came up.<br><br>68-ID - Minor issues and bug fixes were completed this month, finalizing 68-ID work.<br><br>The team prepared for T3 training scheduled for 6/3 - 6/10. The training will be half-day training and completely remote. There will be 47 Iwers and 3 new TLs. The training will focus on DCA and 68ID, and there will be no Family Listing training. T3 is the last currently scheduled training for PSID2025.<br><br>Sample Release / Mailing:<br>Release 5 Advance letters were mailed in late May, with completion of WSO for scheduled for the end of June. 2025 CATI splitoff Advance letters were also mailed in May. The mailing protocol is complex, and includes five releases of CATI and WEB sample, unique mailings for remails to non-responders, Web special offers, EG, post cards, split-offs, Web VIN experiments, and two incentive amounts. | |
| **Special Issues** | | |
| **Cost as of Jun 09, 2025** | ***Total Cost to Date (direct + indirect):*** | 2,974,025.66 |
| | ***Est Cost at Completion (E$AC):*** | 7,441,111.49 |
| | ***Total Budget:*** | 7,805,285.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 364,173.51 |
| | ***Reason for Variance:*** | Note: Projection updates are still underway.<br>Reduced iwer data collection effort due to less sample than budgeted and anticipating a higher percentage of web completes than budgeted. Removed costs associated with new hires and in-person training. Projecting interviewers and survey specialists/directors at a higher rate than budgeted. Designing data collection and training differently than budgeted. PIs desire to keep the underrun. |
| **Projections as of Jun 09, 2025** | ***Dollars Projected for Month:*** | 607,380.01 |
| | ***Actual Dollars Used:*** | 617,225.75 |
| | ***Variance (Projected minus Actual):*** | -9,845.74 |
| | ***Reason for Variance:*** | Data management, MSMS set-up programming, and interviewing hours were higher than projected. |

**Measures**

| | Units at Complete | RR | HPI |
|---|---|---|---|
| ***Current Goal:*** | | | |
| ***Goal at Completion:*** | 9,994 | 89% | 4.73 |
| ***Current Actual:*** | 1874 | 40% | 1.6 |
| ***Estimate at Complete:*** | 9,994 | 89% | 4.73 |
| ***Variance:*** | | | |

| | |
|---|---|
| **Other Measures** | Note: Current actual metrics based on the Dashboard with the week ending on 5/3/25.<br>'Current goals' will be populated as production goals are finalized. 'Estimated' goals at completion will be updated as production is underway. Currently monitoring 2025 production against the 2023 production curves for comparable sample releases. |

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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** | Sarah Maggio (Uniformed Services 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 follow-up survey:<br><br>Life Force Baselines will begin in July, continue for 1 year and will be followed by a 3 month and 6 month follow-up survey.<br>Pathfinding Baselines will begin in mid-August, continue for 2 years and will be followed by a 6 month and 12 month follow-up survey.<br>Life Skills Training Baselines will begin in October, continue for 1 year and will be followed by a 1 month, 3 month, and 6 month follow-up survey.<br><br>SRO will program technical systems and instruments for all 3 components at the Baseline phase. Life Force and Life Skills Training surveys will be completed via web and WSMS. Pathfinding surveys will be completed via phone and WSMS. SRO will use MSMS and Blaise to collect data for the follow-up surveys for all 3 components. Follow-up surveys will start via web and then non-responders will be contacted by the SRO SSL to complete their surveys by phone. Baseline production will start in July of 2025 and Follow-up production will begin in October of 2025. |
| **SRO Project Period** | 01/2025 - 01/2029 |
| **Data Col Period** | 07/2025 - 11/2028 |
| **Security Plan** | NA |
| **Milestones** | ***Pre Production Start:*** 01/06/2025 ***Pretest Start:***<br>***Pretest End:*** ***Recruitment Start:***<br>***Staffing Complete:*** ***GIT Start:***<br>***SS Train Start:*** ***SS Train End:***<br>***DC Start:*** ***DC End:*** |
| **Other Project Team Members** | Stephanie Chardoul - UM PI<br>Shonda Kruger - Ndiaye - Senior Project Advisor<br>Meredith House - Survey Director / Advisor<br>Dan Tomlin - Project Lead<br>Anthony Romanowski - Project Manager (Technical Systems Development)<br>William Lokers - Financial Analyst<br>Joseph Zylka - Financial Analyst<br>Peter Sparks - CAI Programmer (Blaise)<br>Hueichun Peng - WSMS Programmer / Tech Lead<br>Sarah Bromand - WSMS Programmer<br>Cheng Zhou - WSMS Programmer<br>Brianna Sabol - Data Manager<br>Laura Yoder - Data Manager / Advisor<br>David Bolt - Help Desk<br>Vanessa Clarke - Project Assistant |
| **Other Project Name** | Safeguard - Life Skills Training<br>Safeguard - Life Force<br>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 |

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|---|---|---|---|
| **Report Period** | May, 2025 (SAFEGUARD) | Planning | |
| **Risk Level** | On Track | | |
| **Monthly Updates** | In May, all attention was put towards testing the Life Force instrument and finalize specification changes provided by the client. Blaise programming took priority along with setting up testing and production servers and creating a fully functioning WSMS site to track Blaise pulls and outcomes. In addition, MSMS planning is underway, Pathfinding specifications are being finalized, and Life Skills Training systems are being developed. | | |
| **Special Issues** | N/A | | |
| **Cost as of Jun 17, 2025** | ***Total Cost to Date (direct + indirect):*** | | 188,751.53 |
| | ***Est Cost at Completion (E$AC):*** | | 3,541,377.98 |
| | ***Total Budget:*** | | 3,433,360.00 |
| | ***Variance (Total Budget minus- E$AC):*** | | -108,017.98 |
| | ***Reason for Variance:*** | Total hours were close to projections in May but there was some cost variance due to the staff who's hours came in under projections. Data manager hours in particular are still lower than expected during the setup process but will pick up significantly as data testing and production begin in June and July. | |
| **Projections as of Jun 17, 2025** | ***Dollars Projected for Month:*** | | 68,173.26 |
| | ***Actual Dollars Used:*** | | 54,740.92 |
| | ***Variance (Projected minus Actual):*** | | 13,432.34 |
| | ***Reason for Variance:*** | Total hours were close to projections in May but there was some cost variance due to the staff who's hours came in under projections. Data manager hours in particular are still lower than expected during the setup process but will pick up significantly as data testing and production begin in June and July. | |

| **Measures** | | **Units at Complete** | **RR** | **HPI** |
|---|---|---|---|---|
| | ***Current Goal:*** | | | |
| | ***Goal at Completion:*** | | | |
| | ***Current Actual:*** | | | |
| | ***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** | | |
|---|---|---|
| | ***Pre Production Start:*** | ***Pretest Start:*** |
| | ***Pretest End:*** | ***Recruitment Start:*** |
| | ***Staffing Complete:*** | ***GIT Start:*** |
| | ***SS Train Start:*** | ***SS Train End:*** |
| | ***DC Start:*** | ***DC End:*** |

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|---|---|
| **Other Project Team Members** | Karl Dinklemann (Programmer/Analyst)<br>Kelly Chatain (Archivist)<br>Andrew Piskorowski (BI Analyst)<br>Cheng Zhou (Database Analyst/Programmer)<br>Jennie Williams (General Programmer/Analyst)<br>Deb Seale (SSL Operations Manager)<br>iAn Woods (Coder)<br>Ann Munster (Coder)<br>Nancy Walker (Coder)<br>Lisa Carn (Coder)<br>Peter Sparks (Programmer)<br>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 |

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|---|---|---|
| **Report Period** | May, 2025 (SCA Web 2025) | Initiation |
| **Risk Level** | On Track | |
| **Monthly Updates** | During the May 2025 calendar month, SCA coding processed 992 cases with an additional 116 cases for IRR (total of 1,108 cases, 10.5% of cases selected for check coding). The number of cases associated with May 2025 represent the lowest number of cases in a calendar month thus far in calendar year 2025. | |

| | | |
|---|---|---|
| | Overall, coder efficiency for the month saw improved efficiency during the May calendar month as coders averaged 5.2 minutes per case. During the April calendar month, coders averaged 5.5 minutes per case. It should be noted this calculation utilized the total time charged to the project (in minutes) divided by the total number of cases (which include RR).<br><br>New (returning) open ended question went into production on 5/14. Coding team received training during the week of 5/5. | |
| **Special Issues** | | |
| **Cost as of Jun 17, 2025** | ***Total Cost to Date (direct + indirect):*** | 44,986.02 |
| | ***Est Cost at Completion (E$AC):*** | 117,908.42 |
| | ***Total Budget:*** | 136,554.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 18,645.58 |
| | ***Reason for Variance:*** | A correction in charged time for one of the members of the technical programming team offset costs for the programming team during the calendar month. Costs associated with coding came in slightly less than expected. |
| **Projections as of Jun 17, 2025** | ***Dollars Projected for Month:*** | 10,757.70 |
| | ***Actual Dollars Used:*** | 7,528.23 |
| | ***Variance (Projected minus Actual):*** | 3,229.47 |
| | ***Reason for Variance:*** | Projections were updated the previous month for coding and technical team support. Costs for both coding and technical team support came in under budget during the May 2025 calendar month. The projections are more in line with actual figures seen each month during the 2025 calendar year. |

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

**Other Measures**

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

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

| | |
|---|---|
| **Other Project Team Members** | Shonda Kruger-Ndiaye  Senior Project Advisor (SPA)<br>Donnalee Grey-Farquharson  Project Co-Lead<br>Helen Johnson  Project Co-Lead<br>James Koopman Project Manager<br>Raphael Nishimura  Sampling/Mapping<br>Minako Edgar  Reports/Mapping<br>Laura Yoder  Data Manager Lead<br>Asia Paige  Data Manager<br>Carl Remmert  Financial Analyst Senior<br>David Kellermeyer  Financial Analyst |
| **Other Project Name** | |
| **Sample Mgmt System** | Project specific system (Qualtrics) |
| **Data Col Tool** | Other (Qualtrics) |
| **Hardware** | NA |

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

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|---|---|---|---|
| **Report Period** | May, 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. Work is expected to end in June. | | |
| **Special Issues** | | | |
| **Cost as of May 31, 2025** | ***Total Cost to Date (direct + indirect):*** | | 120,947.88 |
| | ***Est Cost at Completion (E$AC):*** | | 122,738.26 |
| | ***Total Budget:*** | | 137,834.00 |
| | ***Variance (Total Budget minus- E$AC):*** | | 15,095.74 |
| | ***Reason for Variance:*** | We have projected hours into June for staff who are working on the final data delivery tasks. | |
| **Projections as of May 31, 2025** | ***Dollars Projected for Month:*** | | 3,476.43 |
| | ***Actual Dollars Used:*** | | 3,294.01 |
| | ***Variance (Projected minus Actual):*** | | 182.42 |
| | ***Reason for Variance:*** | A few hours less than the projected was charged. | |

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

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|---|---|
| **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) |

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|---|---|---|
| **Report Period** | May, 2025 (SRS 2021) | Closing |
| **Risk Level** | On Track | |
| **Monthly Updates** | In May the SRO team produced an interim deliverable for the research team, and continued work on reconciliation and sorting of cognitive packets (which took far longer than anticipated). The team also worked on disposition of study materials and production of final reports. Work on weights has been delayed, and we now expect delivery of weights and final report to be in July. | |

| | | |
|---|---|---|
| **Special Issues** | There are no special issues to report at this time. | |
| **Cost as of Jun 17, 2025** | ***Total Cost to Date (direct + indirect):*** | 6,115,911.50 |
| | ***Est Cost at Completion (E$AC):*** | 6,137,852.12 |
| | ***Total Budget:*** | 6,141,810.11 |
| | ***Variance (Total Budget minus- E$AC):*** | 3,957.99 |
| | ***Reason for Variance:*** This is an insignificant variance. | |
| **Projections as of Jun 17, 2025** | ***Dollars Projected for Month:*** | 42,712.67 |
| | ***Actual Dollars Used:*** | 46,942.20 |
| | ***Variance (Projected minus Actual):*** | -4,229.53 |
| | ***Reason for Variance:*** An invoice for shipping was improperly applied to SRS, and erroneous telephone charges hit the SRS project in May. Both items almost fully explain the variance. | |

| **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:*** | | | |

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|---|---|
| **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** | James Wagner (University of Michigan) |
| **Investigator/Clients** | Robert Ursano (Uniformed Services University of the Health Scienc) |
| | Murray Stein / Ron Kessler (University of California San Diego / Harvard) |
| **Funding Agency** | Department of Defense |
| **IRB** | ***HUM#:*** HUM00180765 ***Period of Approval:*** 3/21/24 - 3/20/25 |
| **Project Team** | ***Project Lead:*** Meredith A House |
| | ***Budget Analyst:*** William Lokers |
| | ***Production Manager:*** Ruth B Philippou |
| | ***Senior Project Advisor:*** Lisa S Holland |
| | ***Production Manager 1:*** Jeffrey Albrecht Jr |
| | ***Production Manager 2:*** Lisa M Lewandowski-Romps |
| **Proposal #** | no data |
| **Description** | This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.<br><br>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.<br><br>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.<br><br>In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys). |
| **SRO Project Period** | 05/2020 - 02/2025 |
| **Data Col Period** | 11/2022 - 04/2024 |
| **Security Plan** | Yes |
| **Milestones** | ***Pre Production Start:*** 04/01/2024 ***Pretest Start:***<br>***Pretest End:*** ***Recruitment Start:*** 08/19/2024<br>***Staffing Complete:*** 10/29/2024 ***GIT Start:*** 11/12/2024<br>***SS Train Start:*** 11/21/2024 ***SS Train End:*** 11/26/2024<br>***DC Start:*** 11/11/2024 ***DC End:*** 05/03/2026 |
| **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 CARI) |
| **Incentive** | Yes, R |
| **Administration** | SRO Group |
| **Payment Type** | Check, post ($50-$100) |
| **Payment Method** | Check through other system (MSMS) |

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|---|---|---|
| **Report Period** | May, 2025 (STARRS-LS Waves 3, 4, 5 | Implementing |
| **Risk Level** | On Track | |

**Monthly Updates**

Project Management and Planning:
• Budget/Funding:
o In April, the establishment of a Year 6 hardship account was approved to move forward, but the request was met with unexpected administrative complications at U-M ORSP. Financial analyst, Bill Lokers, worked with U-M administrators to find a solution that would allow the hardship account to be set up. On May 14, 2025, the hardship was approved and started going through final processing. Final processing was completed May 22 and Bill was able to begin setting up new account codes for staff to charge time and expenses.
o We received the first draft of the Year 6 subaward from HJF on May 17. U-M ORSP started the review process. We understand that Year 6 will be treated as a 10-month "year." As a result, the U-M budget was reduced to $3,462,148 from $4,154,578.
o Also see the Areas of Risk, Mitigation Strategies section.
• Proposal:
o The memo containing options for length and frequency of STARRS-LS waves beyond Wave 5 was discussed on the May 13 PI call. The PIs agreed with the recommendation to pursue "option 3." Meredith wrote a summary of the plan for notifying Scott. Jeff sent that summary with a cover memo, "Proposed Way Ahead for STARRS-LS—Wave 6 and Beyond," to Scott on May 19. Scott said he would share it with the GSC EC members.
o U-M worked on the formal budget for Years 6-10, 3/1/25 – 2/28/30 (not Years 7-10 as previously understood). The budget packet was completed May 29 and then started making its way through the formal U-M channels for approval.
• 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:
o The continuing review for the STARRS-LS Wave 5 protocol was approved by the U-M IRB on May 13 and sent to USUHS for secondary review.

Enclave and User Support:
• Annual IA security review: We awaited word from M&RA and AAG about the annual enclave security review.
• Annual NDI Data Request (2025 request for data through 2023):
o The cost estimate for this year's data was sent to M&RA so that they could begin the process to establish payment with the CDC.
o Meredith worked with Aaron Weingrad, Dr. Ursano and Dr. Benedek on steps needed to transition the PI role and NDI application from Dr. Ursano to Dr. Benedek.
o Updated confidentiality agreements will be needed from all parties this year. Once the application is reassigned, Meredith will work with USUHS to review information in the application including downloading a copy of the most current Supplemental Confidentiality Agreement. Meredith will send emails out to all parties about updating their confidentiality agreements.
o Scott had questions about the confidentiality agreement. Meredith sent an email with a "preview" of the process to come.
• Collaboration with ORISE fellow, Dr. Dias, working with Dr. Jarvis of Army G-9/DPRR: We assisted USUHS and provided documentation needed to complete and submit a request for the DUA between HJF and Dr. Dias.
• 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:
o The enclave team processed a Polygenic Risk Score (PRS) data file and completed its transfer to GLC for a UCSD-affiliated analyst.
o Onboarding to the enclave was completed for two U-M staff members.
o Offboarding was completed for a Harvard analyst who is retiring.
• Biomarker group request for assistance:
o USUHS/CHIRP analysis using WGS and Army/DoD admin data:
? The U-M Enclave team awaited information from the requestors about whether it could be an option to move some genetic data to the enclave to carry out a targeted analysis.
? James and Meredith participated in a discussion with the PIs/research team questioning whether the Army might reassess data security requirements to allow use of admin data off the enclave.
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:
• 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 June 1, 2025, are as follows:
o Replicates released: 6 of 14 released with 6,202 sample lines.
o Completed interviews: 4,082 (3,937 web; 145 phone)
o Replicate 4 ended production on May 12 with a final response rate of 72.2%, which is 3.6 percentage points lower than the average of Replicates 1-3. This lowered the overall response rate for completed replicates to 74.7% (from 75.8%).
o Replicate 5 transitioned to Phase 4 (continued calling, $100 token of appreciation) on Saturday, May 24. By the end of the month, the response rate was 66.2% and tracking about 2 percentage points above the average rate.
o Replicate 6 was released on Monday, May 12 with invitation letters mailed to 1,075 participants. By the end of the month, Rep 6 moved into Phase 2. The response rate was 34.4% and tracking with the average rate.
o Note that the incentive experiment has concluded. It was conducted in Replicates 1-3, so we may see lower response rates starting with Replicate 4.
o The response rate for completed replicates (Reps 1-4) is 74.7%.

Safety Plan Results:
• The Wave 5 combined Safety Plan rate was 12.1% as of June 1:
o Army Chaplains:
? 1,257 (# started IW), 1,204 (# completed IW), 96 (safety plan checks), 7.6% activation rate
o U-M CCP:
? 2,993 (# started IW), 2,878 (# completed IW), 412 (safety plan checks), 13.9% 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 As noted in the Project Management and Planning section, the unexpected administrative complications at U-M ORSP related to the Year 6 hardship were resolved and financial analyst, Bill Lokers, was able to start setting up Year 6 accounts. Account codes for staff to charge time and expenses became available on 6/13.
o Additionally, U-M received the first draft of the Year 6 subaward from HJF on May 17. As of the date of this report, back and forth negotiation is happening between U-M ORSP and HJF. We hope this process continues to move forward in a timely fashion. SRC's approval of a hardship is limited to an initial three months. The start letter was dated April 1 and our Year 5 funding ran out about 1 week into April, so the actual Year 6 subaward will need to be in place by July 1, 2025.

| | | |
|---|---|---|
| **Cost as of Apr 30, 2025** | ***Total Cost to Date (direct + indirect):*** | 14,051,203.71 |
| | ***Est Cost at Completion (E$AC):*** | 14,051,203.71 |
| | ***Total Budget:*** | 13,730,116.00 |
| | ***Variance (Total Budget minus- E$AC):*** | -321,087.71 |
| | ***Reason for Variance:*** | Feb 28, 2025 marked the end of the 2020-2025 5-year scope of work and budget. In April, we spent the remaining $45,406 of the $338k underrun amount (no cost extension) plus an additional $321,088 which will be moved to the Year 6 hardship account when it becomes available next month. |

| | | |
|---|---|---|
| **Projections as of Apr 30, 2025** | ***Dollars Projected for Month:*** | 0.00 |
| | ***Actual Dollars Used:*** | 366,493.77 |
| | ***Variance (Projected minus Actual):*** | -366,493.77 |
| | ***Reason for Variance:*** | Feb 28, 2025 marked the end of the 2020-2025 5-year scope of work and budget. In April, we spent the remaining $45,406 of the $338k underrun amount (no cost extension) plus an additional $321,088 or a total of $366,494.<br><br>There are no projections in CRS until we get the Year 6 hardship (mid-project advance) or actual award set up, but the placeholder projections in the CRS sandbox estimated we would spend $312,852. Actuals were $366,494 ($53,642 more). Rpay came through at $46K (total) more than projected, so all but ~$7.5k of the monthly overspending was from Rpay. Cumulatively, we are only about $8.7k (total) over what we have projected to spend on Rpay. Month to month, there can be a lot of variance despite trying to anticipate when Rpay costs will hit, but overall the Rpay projections should be pretty accurate. We will continue to monitor and adjust as necessary. |

| **Measures** | | **Units at Complete** | **RR** | **HPI** |
|---|---|---|---|---|
| | ***Current Goal:*** | 10,689 | 72% | 12.0 |
| | ***Goal at Completion:*** | 10,689 | 72% | 12.0 |
| | ***Current Actual:*** | 4,082 | 74.7% (Reps 1-4) | 16.5 |
| | ***Estimate at Complete:*** | 10,689 | 72% | 12.0 |
| | ***Variance:*** | 0 | 0 | 0 |

**Other Measures**

Stats as of 6/1/25.

| | | | |
|---|---|---|---|
| **Project Name** | **(WaISS) 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 Doher | | |
| | ***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** | | |
|---|---|---|
| | ***Pre Production Start:*** 02/01/2025 | ***Pretest Start:*** 06/18/2025 |
| | ***Pretest End:*** 06/30/2025 | ***Recruitment Start:*** 08/01/2025 |
| | ***Staffing Complete:*** | ***GIT Start:*** |
| | ***SS Train Start:*** | ***SS Train End:*** |
| | ***DC Start:*** | ***DC End:*** |

| | |
|---|---|
| **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) |

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| | | |
|---|---|---|
| **Report Period** | May, 2025 (WaISS) | Planning |
| **Risk Level** | On Track | |
| **Monthly Updates** | -In May, Jeffrey summarized findings from the focus groups for the PIs. While the focus groups provided important insights into the survey questions (e.g., on item wording and interpretation), there weren't enough survey responses to gauge the psychometric properties of the items, e.g., reliability and validity. So, Jeffrey proposed to conduct a quick turnaround pretest of the web survey, which Shonda and the PIs approved.<br>-The pretest will include an incentive experiment to compare the effectiveness of $10 versus $20 tokens in recruiting respondents. This will inform the token used for Wave 1 this fall. Also, we will experimentally test two versions of the core prejudice questions in the survey to examine which versions get better psychometric results.<br>-Jeffrey worked with Nicole and Shonda to identify where funds could be moved from Wave 1 pre-production to accommodate the pretest, e.g., shifting survey programming to begin in early June instead of August.<br>-We are hoping to achieve at least a 20% response rate (100 completed surveys) with the pretest, using the sample that was provided by the Registrar's Office for the focus groups. | |

| | | |
|---|---|---|
| **Special Issues** | -None to report at this time | |
| **Cost as of Jun 10, 2025** | ***Total Cost to Date (direct + indirect):*** | 30,346.27 |
| | ***Est Cost at Completion (E$AC):*** | 283,558.95 |
| | ***Total Budget:*** | 1,002,656.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 78.05 |
| | ***Reason for Variance:*** | -We continue to monitor the budget using the total Year 1 budget of $283,637.<br>-Upon further consultation with other projects, Jeffrey proposed updating the Wave 1 assumptions, which projects an 11.6% overall response rate. If the responses are anything like CCS, then we would expect to exceed those rates before calling begins, which would most likely result in cancelling a good deal of SSL work on short notice. To prevent that scenario, Jeffrey and Raphael reworked the study design to break the sample into three replicates that will be released over several weeks. This would allow us to gauge responses to the emails and text in Replicate 1, so that we could determine if calling would be needed in Replicate 3. Further, we will conduct an experiment to test the effects of the reminder calling efforts in Replicates 1 and 2, which reduced calling effort from 4 weeks to 2 weeks for half of the sample, freeing up additional funds (~$17,000) for Year 1.<br>-Assuming a $20 token, we can now pay for 850 more completed surveys, meaning that (instead of the project 11.6% rate) we could afford a 17.5% overall response rate (still much lower than the 34% rate achieved in Wave 1 of the CCS project without reminder calling). If the tokens end up being $10, we could afford up to a 35% response rate, which is about what we are projecting by the end of the full Wave 1 protocol. Whichever scenario we end up with, the replicate design and calling experiment will provide the flexibility to pivot if needed during Wave 1 production. |
| **Projections as of Jun 10, 2025** | ***Dollars Projected for Month:*** | 4,645.03 |
| | ***Actual Dollars Used:*** | 6,689.42 |
| | ***Variance (Projected minus Actual):*** | -2,044.39 |
| | ***Reason for Variance:*** | -Jeffrey underestimated his projections on account of out of office time that is charged directly to the WAISS shortcode. |

| **Measures** | | **Units at Complete** | **RR** | **HPI** |
|---|---|---|---|---|
| | ***Current Goal:*** | 100 | 20% | |
| | ***Goal at Completion:*** | 100 | 20% | |
| | ***Current Actual:*** | 0 | 0% | |
| | ***Estimate at Complete:*** | 100 | 20% | |
| | ***Variance:*** | 0 | 0% | |

**Other Measures**

# Developmental/Initiative Projects Dashboard

**NonArchived Development Initiative and No-DataCol Projects**

| Project | Type | Phase | Project Lead | Jan | Feb | Mar | Apr | May |
|---|---|---|---|---|---|---|---|---|
| *TSME25 Blaise 5 (423562)* | Initiatives | Initiation | Karl A Dinkelmann | | | | | |
| *TSME25 DCO Systems Support (483248)* | Initiatives | Initiation | Vivienne Y Outlaw | | | | | |
| *TSME25 MSMS Line Generator (483227)* | Initiatives | Closing | Mark Simonson | | | | | |
| *TSME25 MSMS Performance (425267)* | Initiatives | Implementing | Jim Rodgers | | | | | |
| *TSME25 ODS Data Dictionary (425198)* | Initiatives | Implementing | Mark Simonson | | | | | |
| *TSME25 QC Systems (483249)* | Initiatives | Implementing | Sarah Elisa Broumand | | | | | |
| *TSME25 System Maintenance - General (483910)* | Initiatives | Implementing | Jeffrey L Smith | | | | | |
| *TSME25 Team Dynamix (425197)* | Initiatives | Initiation | David Bolt | | | | | |
| *TSME25 TEAM LOCATION (424466)* | Initiatives | Implementing | Mark Simonson | | | | | |
| *TSME25 Translation Tool (483424)* | 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** | This fiscal year 2025 initiative continues work from last fiscal year and targets some areas we aim to address in the next year. We envision using these funds to finish load testing of multiple server environments to address concurrency and develop a new standard for our server configuration. Additionally, we would like to test elements of the forthcoming Blaise 5.15 scheduled for December 2024, potentially including video interviewing components.NET8 APIs and other feature enhancements. Finally, if funds permit, some relatively newer features are introduced into some of the newer versions of Blaise that we would like to review. These include a Blaise print option and test record generation, and they begin investigating possibilities for automated testing. While the funds will not allow us to do all these tasks, we aim to stretch as much as possible from the funding. I have asked Shane Emipe to assist me in taking the lead on this initiative. | | |
| **SRO Project Period** | 07/2024 - 06/2025 | | |
| **Data Col Period** | | | |
| **Security Plan** | NA | | |
| **Milestones** | ***Pre Production Start:*** | ***Pretest Start:*** | |
| | ***Pretest End:*** | ***Recruitment Start:*** | |
| | ***Staffing Complete:*** | ***GIT Start:*** | |
| | ***SS Train Start:*** | ***SS Train End:*** | |
| | ***DC Start:*** | ***DC End:*** | |
| **Other Project Team Members** | Shane Emipe | | |
| **Other Project Name** | | | |
| **Sample Mgmt System** | NA | | |
| **Data Col Tool** | NA | | |
| **Hardware** | NA | | |
| **DE Software** | N/A | | |
| **QC Recording Tool** | N/A | | |
| **Incentive** | Not used | | |
| **Administration** | N/A | | |
| **Payment Type** | N/A | | |
| **Payment Method** | N/A | | |

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| | | | |
|---|---|---|---|
| **Report Period** | May, 2025 (TSME25 Blaise 5 (423562)) | | Initiation |
| **Risk Level** | On Track | | |
| **Monthly Updates** | Working on finalizing things for this TSME fiscal year. Will have a better summary of FY25 next month. | | |
| **Special Issues** | na | | |
| **Cost as of Jun 17, 2025** | ***Total Cost to Date (direct + indirect):*** | | 7,338.76 |
| | ***Est Cost at Completion (E$AC):*** | | 10,006.24 |
| | ***Total Budget:*** | | 10,000.00 |

| | | |
|---|---|---|
| | ***Variance (Total Budget minus- E$AC):*** | -6.24 |
| | ***Reason for Variance:*** | Slightly over the total amount due to attempting to maximize the total budget and whole hours spent on the project. |
| **Projections as of Jun 17, 2025** | ***Dollars Projected for Month:*** | 1,000.31 |
| | ***Actual Dollars Used:*** | 982.47 |
| | ***Variance (Projected minus Actual):*** | 17.84 |
| | ***Reason for Variance:*** | Slightly over the total amount due to attempting to maximize the total budget and whole hours spent on the project. |

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

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

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|---|---|---|---|
| **Report Period** | May, 2025 (TSME25 DCO Systems | | Initiation |
| **Risk Level** | On Track | | |
| **Monthly Updates** | x | | |
| **Special Issues** | x | | |
| **Cost as of Jun 09, 2025** | ***Total Cost to Date (direct + indirect):*** | | 36,175.72 |
| | ***Est Cost at Completion (E$AC):*** | | 41,353.77 |
| | ***Total Budget:*** | | 40,000.00 |
| | ***Variance (Total Budget minus- E$AC):*** | | -1,353.77 |
| | ***Reason for Variance:*** | DCO support needs exceed the budget | |
| **Projections as of Jun 09, 2025** | ***Dollars Projected for Month:*** | | 5,178.05 |
| | ***Actual Dollars Used:*** | | 4,951.37 |

| | | |
|---|---|---|
| | ***Variance (Projected minus Actual):*** | 226.68 |
| | ***Reason for Variance:*** | Production work took priority over development |

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

**Other Measures**

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

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

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

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| | | |
|---|---|---|
| **Report Period** | May, 2025 (TSME25 MSMS Line | Closing |
| **Risk Level** | On Track | |
| **Monthly Updates** | Completed all requirements for the MSMS line Generator, first project to use will be FFCWS in June. There may be a few adjustments as projects statrt the use the tool, but for the most part it is done. | |
| **Special Issues** | | |
| **Cost as of Jun 09, 2025** | ***Total Cost to Date (direct + indirect):*** | 10,641.41 |
| | ***Est Cost at Completion (E$AC):*** | 10,641.41 |
| | ***Total Budget:*** | 10,500.00 |
| | ***Variance (Total Budget minus- E$AC):*** | -141.41 |
| | ***Reason for Variance:*** went slightly over | |
| **Projections as of Jun 09, 2025** | ***Dollars Projected for Month:*** | 402.36 |
| | ***Actual Dollars Used:*** | -479.66 |

| | | |
|---|---|---|
| | ***Variance (Projected minus Actual):*** | 882.02 |
| | ***Reason for Variance:*** | removed projection hours and task was completed. |

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

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

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|---|---|---|---|
| **Report Period** | May, 2025 (TSME25 MSMS Performance | | Implementing |
| **Risk Level** | On Track | | |
| **Monthly Updates** | Work is proceeding | | |
| **Special Issues** | | | |
| **Cost as of Jun 09, 2025** | ***Total Cost to Date (direct + indirect):*** | | 68,055.96 |
| | ***Est Cost at Completion (E$AC):*** | | 75,041.62 |
| | ***Total Budget:*** | | 100,000.00 |
| | ***Variance (Total Budget minus- E$AC):*** | | 24,958.38 |
| | ***Reason for Variance:*** | Update | |
| **Projections as of Jun 09, 2025** | ***Dollars Projected for Month:*** | | 7,318.31 |

| | | |
|---|---|---|
| | ***Actual Dollars Used:*** | 6,542.03 |
| | ***Variance (Projected minus Actual):*** | 776.28 |
| | ***Reason for Variance:*** | Update |

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

**Other Measures**

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

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

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|---|---|
| **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 |

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|---|---|---|
| **Report Period** | May, 2025 (TSME25 ODS Data Dictionary | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | Met with Grant to review what has been done so far with the ODS Sandbox and identify changes needed to make this more friendly to our exteranl non DMSS and TSG users. A website was created that can hold all the API's with descriptions. The ODS team is updating the following documentation that is available from the PDMT Tool Sandbox.<br>1. The description of each API<br>2. Identifying required parameters for each API<br>3. Displaying the Data dictioary for the resulting data set producted by the API | |
| **Special Issues** | | |
| **Cost as of Jun 17, 2025** | ***Total Cost to Date (direct + indirect):*** | 499.49 |
| | ***Est Cost at Completion (E$AC):*** | 4,440.26 |
| | ***Total Budget:*** | 4,500.00 |

| | | |
|---|---|---|
| | ***Variance (Total Budget minus- E$AC):*** | 59.74 |
| | ***Reason for Variance:*** | minimal variance. |
| **Projections as of Jun 17, 2025** | ***Dollars Projected for Month:*** | 4,003.05 |
| | ***Actual Dollars Used:*** | 159.64 |
| | ***Variance (Projected minus Actual):*** | 3,843.41 |
| | ***Reason for Variance:*** | NO hours spent in May, funds carried to June. |

| **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** | **(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** | | |
|---|---|---|
| | ***Pre Production Start:*** | ***Pretest Start:*** |
| | ***Pretest End:*** | ***Recruitment Start:*** |
| | ***Staffing Complete:*** | ***GIT Start:*** |
| | ***SS Train Start:*** | ***SS Train End:*** |
| | ***DC Start:*** | ***DC End:*** |

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|---|---|
| **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 |

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|---|---|---|
| **Report Period** | May, 2025 (TSME25 QC Systems | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | Additional categories and sorting was requested that we are working through, it was decided to release this large batch of changes at the begining of July. Currently testing changes and prepareing for release to production.<br><br>We will not be able to spend the $1,695.39. Programmer was too busy doing other production work. | |
| **Special Issues** | | |

| | | |
|---|---|---|
| **Cost as of Jun 17, 2025** | ***Total Cost to Date (direct + indirect):*** | 25,465.18 |
| | ***Est Cost at Completion (E$AC):*** | 33,304.61 |
| | ***Total Budget:*** | 35,000.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 1,695.39 |
| | ***Reason for Variance:*** | We will not be able to spend the $2,416.24. Programmer was too busy |

| | | |
|---|---|---|
| | | doing other production work. |
| **Projections as of Jun 17, 2025** | ***Dollars Projected for Month:*** | 7,043.79 |
| | ***Actual Dollars Used:*** | 4,756.39 |
| | ***Variance (Projected minus Actual):*** | 2,287.40 |
| | ***Reason for Variance:*** | Funds carried over to june. |

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

**Other Measures**

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

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

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

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|---|---|---|
| **Report Period** | May, 2025 (TSME25 System Maintenance | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | Encryption and Security<br>-Encrypt ST Password: ST Admin 25<br>-Encrypted Password: ST Employee Data Merge<br><br>Database and File Management<br>-DB Archiver<br>-FileSync<br>-FTP/FileSync/JSON in ST11<br><br>Software Development and Testing<br>-ST Patch/ST Builder<br>-ST25 Regression Testing Review<br>-FileSync Testing<br><br>Meetings and Team Activities | |

| | | |
|---|---|---|
| | -ST/PB Build Team Meeting<br><br>Data Management<br>-ST Employee Data Merge | |
| **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 Jun 17, 2025** | ***Total Cost to Date (direct + indirect):*** | 78,654.17 |
| | ***Est Cost at Completion (E$AC):*** | 81,110.94 |
| | ***Total Budget:*** | 35,000.00 |
| | ***Variance (Total Budget minus- E$AC):*** | -46,110.94 |
| | ***Reason for Variance:*** see below | |
| **Projections as of Jun 17, 2025** | ***Dollars Projected for Month:*** | 2,456.77 |
| | ***Actual Dollars Used:*** | 5,064.07 |
| | ***Variance (Projected minus Actual):*** | -2,607.30 |
| | ***Reason for Variance:*** Hours /costs have been reallocated from this account and will be reflected in next month's report. | |

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

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

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

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|---|---|---|
| **Report Period** | May, 2025 (TSME25 Team Dynamix | Initiation |
| **Risk Level** | On Track | |
| **Monthly Updates** | Warp up of final testing of 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 |

| | | |
|---|---|---|
| | ***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** | | | | |

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|---|---|---|---|
| **Project Name** | **(TSME25 TEAM LOCATION (424466)) TSME25 TEAM LOCATION (424466) (On Track)** | | |
| **Project Mode** | Primary: Not Available | | |
| **Project Type** | Developmental Initiatives | | |
| **Budget** | **Direct Budget**: 26,000.00 | **Indirect Budget:** 26,000.00 | **Total Budget:** 26,000.00 |
| **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** | TSME25 TEAM LOCATION<br><br>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.<br><br>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.<br><br>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.<br><br>Spedification Document can be found at:<br>https://docs.google.com/document/d/108rO0HhlfguNaUeWUebQuia8AB2KL7B-6isTyqWeMSc/edit?tab=t.0#heading=h.2payusa1crxf | | |
| **SRO Project Period** | 01/1996 - 01/1996 | | |
| **Data Col Period** | | | |
| **Security Plan** | NA | | |

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

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

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| | | |
|---|---|---|
| **Report Period** | May, 2025 (TSME25 TEAM LOCATION | Implementing |

| | | |
|---|---|---|
| **Risk Level** | On Track | |
| **Monthly Updates** | The application wasd demo'd to the Input team and approved. A few minor items need to be changed in the UI and then later on we will be adding the integration to MSMS. The month of June is reserved for usability testing.<br><br>The following programming items have been completed:<br>1. Adding leads of all types<br>2. Adding contact attempts against each lead<br>3. Added basic production reporting and Weblog like Report<br>4. Added volunteer testers and distributed lines for UI usability testing that will be completed in June.<br><br>Next items for next Fiscal year:<br>1. Adding additional sources where leads were found<br>2. Editing the status of existint leads<br>3. Adding the FTF Flag on the Grid<br>4. A few minor UI changes<br>5. Integration with MSMS | |
| **Special Issues** | | |
| **Cost as of Jun 09, 2025** | ***Total Cost to Date (direct + indirect):*** | 24,340.82 |
| | ***Est Cost at Completion (E$AC):*** | 25,470.67 |
| | ***Total Budget:*** | 26,000.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 529.33 |
| | ***Reason for Variance:*** CRS has not been updated | |
| **Projections as of Jun 09, 2025** | ***Dollars Projected for Month:*** | 15,776.31 |
| | ***Actual Dollars Used:*** | 15,022.99 |
| | ***Variance (Projected minus Actual):*** | 753.32 |
| | ***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** | This fiscal year 2025 initiative aims to automate translation adaptation to a Blaise instrument. Currently, we cut and paste the majority of foreign translation text into Blaise instruments; however, having a way to automate some or most of this would make the process much quicker and less error-prone. If we get the HRS-Kenya and the New Your City Housing projects, we must find a better way. While our goal is to automate as much as possible, we aim to reduce the cutting and pasting necessary to create multi-lingual instruments. We have just begun discussing our options. Early thoughts were to export the text that needs to be translated from Blaise into a structured format (potentially XML) or use the Blaise BITT file. The BITT file is a file Blaise can export and contains most of the translatable text in a data model. The Issue with the BITT file is that it is a one-way process, meaning it can export and allow one to translate the text, but then Blaise uses the BITT file as the source or the datamodel text. This would be a two-way process of exporting and importing the text in the ideal world. Therefore, in this idea, we would complete the circle by importing the BITT file into the Blaise code. I have asked Kelly Lieske to assist me in taking the lead on this initiative. | | |
| **SRO Project Period** | 07/2024 - 06/2025 | | |
| **Data Col Period** | | | |
| **Security Plan** | NA | | |

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

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

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|---|---|---|
| **Report Period** | May, 2025 (TSME25 Translation Tool | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | The most recent work has been focused on creating a user interface or application that allows users to add their translations to the XLIFF translations. | |
| **Special Issues** | na | |

| | | |
|---|---|---|
| **Cost as of Jun 17, 2025** | ***Total Cost to Date (direct + indirect):*** | 10,206.32 |
| | ***Est Cost at Completion (E$AC):*** | 11,405.18 |
| | ***Total Budget:*** | 10,500.00 |
| | ***Variance (Total Budget minus- E$AC):*** | -905.18 |
| | ***Reason for Variance:*** | Slightly over the total amount likely due to attempting to maximise the budget and estimating actual dollars spent with remaining funds to project for June. At that time, we estimated a $13.67 overrun. |
| **Projections as of Jun 17, 2025** | ***Dollars Projected for Month:*** | 1,613.85 |
| | ***Actual Dollars Used:*** | 2,537.50 |
| | ***Variance (Projected minus Actual):*** | -923.65 |
| | ***Reason for Variance:*** | Slightly over the total amount likely due to attempting to maximise the budget and estimating actual dollars spent with remaining funds to project for June. |

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

**Other Measures**