# *Survey Research Operations*

# *Monthly Project Report*

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

***June 2025***

## Sponsored Data Collection Projects and Development Initiative Projects

(ANES 2024) American National Election Studies - 2024
(BFY) Baby's First Years
(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
(HCHD-2025 Locating) Housing & Children's Healthy Development 2025 Locating
(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 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

**NonArchived Sponsored Projects**

| Project | Type | Phase | Project Lead | Jan | Feb | Mar | Apr | May | Jun |
|---|---|---|---|---|---|---|---|---|---|
| *ANES 2024* | Sponsored | Closing | Andrew L Hupp | | | | | | |
| *BFY* | Sponsored | Implementing | Piotr Dworak | | | | | | |
| *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 | | | | | | |
| *HCHD-2025 Locating* | Sponsored | Implementing | Barbara Lohr Ward | | | | | | |
| *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 | Closing | 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 CDS23 Phase 2* | Sponsored | Closing | 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** | June, 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 has coded religion and occupation/industry. Most important problems (MIP) still needs to be coded..<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 Jul 16, 2025** | ***Total Cost to Date (direct + indirect):*** | | 7,344,662.33 |
| | ***Est Cost at Completion (E$AC):*** | | 7,494,214.88 |
| | ***Total Budget:*** | | 7,526,240.00 |
| | ***Variance (Total Budget minus- E$AC):*** | | 32,025.12 |
| | ***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 Jul 16, 2025** | ***Dollars Projected for Month:*** | | 93,051.97 |
| | ***Actual Dollars Used:*** | | 81,908.82 |
| | ***Variance (Projected minus Actual):*** | | 11,143.15 |
| | ***Reason for Variance:*** | NORC hasn't invoiced SRO for all of the work they done yet. | |

| **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**: 750,000.00 | **Indirect Budget:** 112,500.00 | **Total Budget:** 862,500.00 |
| **Principal** | Dr. Greg Duncan (University of California - Irvine) | | |
| **Investigator/Clients** | Dr. Kimberly Noble (Teachers College Columbia University) | | |
| | Dr. Katherine Magnuson (University of Wisconsin) | | |
| **Funding Agency** | National Institute of Child Health and Human Development (NICHD) | | |
| **IRB** | ***HUM#:*** HUM00137963 | | ***Period of Approval:*** |
| **Project Team** | ***Project Lead:*** Piotr Dworak | | |
| | ***Budget Analyst:*** David Kellermeyer | | |
| | ***Production Manager:*** Veronica Connors-Burge | | |
| | ***Senior Project Advisor:*** Stephanie A Chardoul | | |
| | ***Production Manager 1:*** Margaret Lavanger | | |
| | ***Production Manager 2:*** | | |
| **Proposal #** | no data | | |

**Description**

University of Michigan Survey Research Center (U-M SRC) is contracted to recruit and interview participants for Baby's First Years -- a longitudinal randomized control trial study.

The study's full name, listed on sub-contract documents, is Household Income and Child Development in Early Years. The study will draw on a convenience sample of mothers and their newborns in four US metropolitan areas: New York City; Omaha/Lincoln; New Orleans; and Minneapolis. One or two hospitals, listed in this application, will be used as recruiting sites in each area. The study uses a randomized control trial design in which low-income mothers and newborns will be randomly assigned to a treatment group that receives an unconditional income enhancement -- cash payments of $333 per month—an amount roughly comparable to a variety of income assistance policies in the U.S. and shown to be associated with meaningful improvements for poor children in prior studies—or to a control condition that receives $20 per month. In both groups, the payments will be made for the first 40 months of the child's life. To understand the impacts of added income on children's development, researchers will assess treatment/control group differences at ages 1, 2 and 3 on measures of cognitive, language, memory, self-regulation and socio-emotional development. Recruitment is scheduled to start in April of 2018, and each follow-up interview will be conducted 12 months later -- close in time to the child's 1st, 2nd, and 3rd birthday. The feasibility of the approach has been established in a one-year pilot conducted in 2014 at the New York Presbyterian Hospital/Columbia University Medical Center.

The Principal Investigators are Dr. Greg Duncan from University of California Irvine (UCI), Dr. Kimberly Noble from Teacher's College Columbia University (TCCU), and Katherine Magnuson from University of Wisconsin-Madison (UWM). UCI (Dr. Duncan) and TCCU (Dr. Noble) are the institutions and signatories funding the U-M SRC subcontract from various sources including the National Institute for Child Health and Human Development (NICHD) and private foundations listed in this application. The study research team also includes co-investigators Lisa Gennetian (New York University), and Hiro Yoshikawa (New York University).

SRO will be responsible for four interactions with the selected mothers/infants:
• Baseline will occur immediately (within 24-48 hours) after birth, in the hospital;
• Wave 1 will be a telephone interview with the mother when the child is 12 months old;
• Wave 2 will be an in-person interview in the family's home that includes survey, developmental assessment, biomarker collection, and video recorded behavioral interaction when the child is 24 months old;
• Wave 3 will be an in-person survey done while the mother and child are visiting a lab for other clinical tests when the child is 36 months old.

Each data collection phase/wave will be a full 12 months, with Baseline starting in April 2018:

Recruitment/Baseline: 04/01/2018 - 03/31/2019
Wave 1: 04/01/2019 - 03/31/2020
Wave 2: 04/01/2020 - 03/31/2021
Wave 3: 04/01/2021 - 03/31/2022

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| **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** | June, 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>In July, we finished supporting A6 lab data collection with recruitment of some of the hardest to reach cases (via phone and in-person). We are now focusing on following up with cases which reach Age 6 + 4 months and have completed their lab visits.<br><br>Our work on staying in touch with participants will continue until the next wave of Age 8 lab data collection in June 2026 - July 2027.<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. To address the issue, production managers identified 2 on-staff interviewers who will be trained in August. We should be able to add experienced on-staffers to the project 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 Jul 23, 2025** | ***Total Cost to Date (direct + indirect):*** | 218,270.17 |
| | ***Est Cost at Completion (E$AC):*** | 870,333.39 |
| | ***Total Budget:*** | 862,500.00 |
| | ***Variance (Total Budget minus- E$AC):*** | -7,833.39 |
| | ***Reason for Variance:*** | Last months of Age 6 lab recruitment required a bit more travel and involvement from the team. We will communicate the cost to PIs and then work together to adjust allocations to offset the overrun. |

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| **Projections as of Jul 23, 2025** | ***Dollars Projected for Month:*** | 28,785.08 |
| | ***Actual Dollars Used:*** | 32,530.34 |
| | ***Variance (Projected minus Actual):*** | -3,745.26 |
| | ***Reason for Variance:*** | Last months of Age 6 lab recruitment required a bit more travel and involvement from the team. |

| **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** | **(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** | June, 2025 (CARE Military) | Closing |
| **Risk Level** | On Track | |
| **Monthly Updates** | A final performance wage of $39K was approved and paid to field staff in June. Actual bonus costs were lower than projected, concluding field costs. Regular staff continue project close-out activities through September 2025. Several regular staff will attend the 2-day annual CARE Investigator Conference in early September in Chicago, IL. | |
| **Special Issues** | | |
| **Cost as of Jun 30, 2025** | ***Total Cost to Date (direct + indirect):*** | 1,684,473.95 |
| | ***Est Cost at Completion (E$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 June 2025, we allocated $65,652.41 to the Military project with the Civilian funds. This brings our cumulative spending on the military project to $680,166.64 from April 2024 to June 2025. The current spending on Military is reflected the underrun in Civilian funds. |
| **Projections as of Jun 30, 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** | | | | |

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|---|---|
| **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** | June, 2025 (CARE SALTOS MTEC) | Closing |
| **Risk Level** | On Track | |
| **Monthly Updates** | A final performance wage of $39K was approved and paid to field staff in June. Actual bonus costs were lower than projected, concluding field salary costs. Regular staff continue project close-out activities through September 2025. Several regular staff will attend the 2-day annual CARE Investigator Conference in early September in Chicago, IL. | |

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|---|---|---|---|
| **Special Issues** | | | |
| **Cost as of Jun 30, 2025** | ***Total Cost to Date (direct + indirect):*** | | 4,172,806.15 |
| | ***Est Cost at Completion (E$AC):*** | | 4,290,655.29 |
| | ***Total Budget:*** | | 4,685,914.00 |
| | ***Variance (Total Budget minus- E$AC):*** | | 395,258.71 |
| | ***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 June 2025, we allocated $65,652.41 to the Military project with the Civilian funds. This brings our cumulative spending on the military project to $680,166.64 from April 2024 to June 2025. The current spending on Military is reflected the underrun amount in Civilian funds. | |
| **Projections as of Jun 30, 2025** | ***Dollars Projected for Month:*** | | 95,936.75 |
| | ***Actual Dollars Used:*** | | 73,479.58 |
| | ***Variance (Projected minus Actual):*** | | 22,457.17 |
| | ***Reason for Variance:*** | Approved interviewer bonuses totaling $39k were posted in June. The actual bonus cost was lower than projected. | |

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

**Other Measures**

| | | | |
|---|---|---|---|
| **Project Name** | **(CCS) Community College Survey (On Track)** | | |
| **Project Mode** | Primary: Web Total of Modes: 1 | | |
| **Project Type** | Sponsored Projects | | |
| **Budget** | **Direct Budget**: 560,774.00 | **Indirect Budget:** 84,115.00 | **Total Budget:** 644,889.00 |
| **Principal** | Hana Lahr (Teachers College, Columbia University) | | |
| **Investigator/Clients** | Veronica Minaya (Teachers College, Columbia University) | | |
| | Rachel Baker (University of Pennsylvania) | | |
| **Funding Agency** | Ascendium Education Group | | |
| **IRB** | ***HUM#:*** 00237400 | | ***Period of Approval:*** |
| **Project Team** | ***Project Lead:*** Jeffrey Albrecht Jr | | |
| | ***Budget Analyst:*** Nicole Danielle 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** | June, 2025 (CCS) | Planning |
| **Risk Level** | On Track | |
| **Monthly Updates** | CCS was quiet in June. Nicole provided the cost report. Jeffrey worked with the PIs on scope for fall recontact effort. | |
| **Special Issues** | Funds for fall recontact are still held up at ORSP. | |
| **Cost as of Jul 11, 2025** | ***Total Cost to Date (direct + indirect):*** | 855,804.00 |
| | ***Est Cost at Completion (E$AC):*** | 912,061.82 |

| | | |
|---|---|---|
| | ***Total Budget:*** | 644,889.00 |
| | ***Variance (Total Budget minus- E$AC):*** | -76,845.82 |
| | ***Reason for Variance:*** | The overrun reflects the $25,667 Cost share that we are spending down and the $63,239.00 of anticipated additional funding, still with ORSP, so not yet in the budget. The plan is to overrun by this amount until we can get it approved and in the system. This means that $88,906.00 is the total cost cap that we can overrun up to. $76,845.82 is already projected, which leaves the true variance, $12,060.18 underrun. Most of that underrun will go to project management and other setup effort that could use more time. |
| **Projections as of Jul 11, 2025** | ***Dollars Projected for Month:*** | 566.78 |
| | ***Actual Dollars Used:*** | 574.99 |
| | ***Variance (Projected minus Actual):*** | -8.21 |
| | ***Reason for Variance:*** | |

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

**Other Measures**

| | | | |
|---|---|---|---|
| **Project Name** | **(CVFS-SCAN) Chitwan Valley Family Study - Study on Cognition and Aging in Nepal (On Track)** | | |
| **Project Mode** | Primary: Face to Face Total of Modes: 1 | | |
| **Project Type** | Sponsored Projects | | |
| **Budget** | **Direct Budget**: 368,868.00 | **Indirect Budget:** 206,571.00 | **Total Budget:** 575,439.00 |
| **Principal** | Dirgha Ghimire (Survey Research Center) | | |
| **Investigator/Clients** | Carlos Mendes de Leon (Georgetown University School of Medicine) | | |
| | Emily Briceno-ABreu, Co-PI (Michigan Medicine) | | |
| **Funding Agency** | NIH | | |
| **IRB** | ***HUM#:*** | | ***Period of Approval:*** |
| **Project Team** | ***Project Lead:*** Maureen Joan O'Brien | | |
| | ***Budget Analyst:*** Ryan Neice | | |
| | ***Production Manager:*** | | |
| | ***Senior Project Advisor:*** Stephanie A Chardoul | | |
| | ***Production Manager 1:*** | | |
| | ***Production Manager 2:*** | | |
| **Proposal #** | no data | | |
| **Description** | 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** | June, 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 2,452 completed R Part 1's, and 1,827 | |

completed Inf interviews, 217 Part 2 iws have been completed, including WBD. The overall RR is for an overall 74% thus far.

WBD is being tracked via Survey123 and WebLog. Blood tubes are being 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.

An NIH funding review is currently underway, so there is currently no funding. As a result, SRO is providing minimal support to ISER-N at this time.

The data collection end date has not been set, nor the Wave 2 dates. We may have more information about Wave 2 once we know more about the NIH funding review.

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|---|---|---|
| **Special Issues** | NIH Funding Review | |
| **Cost as of Jul 23, 2025** | ***Total Cost to Date (direct + indirect):*** | 397,550.69 |
| | ***Est Cost at Completion (E$AC):*** | 555,804.77 |
| | ***Total Budget:*** | 575,439.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 19,634.23 |
| | ***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 Jul 23, 2025** | ***Dollars Projected for Month:*** | 12,893.26 |
| | ***Actual Dollars Used:*** | 8,724.41 |
| | ***Variance (Projected minus Actual):*** | 4,168.85 |
| | ***Reason for Variance:*** | We are reducing effort on the project to only what is absolutely necessary for support, until funding issues are resolved. |

| **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** | June, 2025 (FFCWS) | | Initiation |
| **Risk Level** | On Track | | |
| **Monthly Updates** | June 2025<br>- as of today (7/24), systems are signed off for the first phase of the project. The pre production locating begins with batch updates (NCOA) to the young adults addresses. A newsletter will be mailed to the young adults (YAs) which includes a request for the YAs to provide current contact info. - the form is access using a an authenticated link (QR code). The results of this mailing (undeliverable, etc.) will determine if manual locating is required for each YA.<br>- Manual locating will begin in mid August.<br>- The team is working on R materials (including a Study Participant website), training for the locators, Blaise programming, specifying the MSMS design for data collection.<br>- We have heard that a request for funding from NSF was successful but haven't received confirmation that Princeton have received an approval notice | | |
| **Special Issues** | | | |
| **Cost as of Jul 23, 2025** | ***Total Cost to Date (direct + indirect):*** | | 178,908.27 |
| | ***Est Cost at Completion (E$AC):*** | | 4,471,803.46 |
| | ***Total Budget:*** | | 4,535,257.00 |
| | ***Variance (Total Budget minus- E$AC):*** | | 63,453.54 |
| | ***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. Princeton are expecting to use this underspend to partly fund the TOA costs (not in the original proposal as requested). | |
| **Projections as of Jul 23, 2025** | ***Dollars Projected for Month:*** | | 87,062.28 |
| | ***Actual Dollars Used:*** | | 72,288.63 |
| | ***Variance (Projected minus Actual):*** | | 14,773.65 |
| | ***Reason for Variance:*** | A few team members charged fewer hours than projected - projections have been updated for the coming months. | |

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

**Other Measures**

| | |
|---|---|
| **Project Name** | **(HCHD-2025 Locating) Housing & Children's Healthy Development 2025 Locating (On Track)** |
| **Project Mode** | Primary: Tracking Total of Modes: 1 |
| **Project Type** | Sponsored Projects |
| **Budget** | **Direct Budget**: 74,955.00 **Indirect Budget:** 41,975.00 **Total Budget:** 116,930.00 |
| **Principal** | Stephanie Chardoul (Survey Research Operations) |
| **Investigator/Clients** | Sandra Newman (Johns Hopkins University) |
| **Funding Agency** | |
| **IRB** | ***HUM#:*** HUM00271320 ***Period of Approval:*** |
| **Project Team** | ***Project Lead:*** Barbara Lohr Ward |
| | ***Budget Analyst:*** Carl S Remmert |
| | ***Production Manager:*** Carolyn Vieira-Martinez |
| | ***Senior Project Advisor:*** Barbara Lohr Ward |
| | ***Production Manager 1:*** Megan Hromco |
| | ***Production Manager 2:*** Ian Woods |
| **Proposal #** | no data |
| **Description** | SRO will attempt to located 895 eligible Wave 1 Voucher respondents. SRO will conduct batch locating, followed by a mailing to all 895 Wave 1 respondents. SRO will hire & train 3 to 5 SSL locators who will make outgoing phone calls to respondents to update their contact information in advance of a planned (but not yet funded) Wave 3 data collection effort. A locating letter with a $5 token of appreciation will invite respondents to update their contact information by completing a web form (Qualtrics), by calling the RCT, or by emailing the study mailbox. Centralized manual location efforts will include database searches and direct calling to those respondents who have not yet updated their contact information. SRO will provide monthly progress and cost reports to the client. |
| **SRO Project Period** | 02/2025 - 11/2025 |
| **Data Col Period** | 06/2025 - 10/2025 |
| **Security Plan** | NA |

| **Milestones** | | |
|---|---|---|
| | ***Pre Production Start:*** 03/01/2025 | ***Pretest Start:*** |
| | ***Pretest End:*** | ***Recruitment Start:*** 04/01/2025 |
| | ***Staffing Complete:*** 04/30/2025 | ***GIT Start:*** |
| | ***SS Train Start:*** 07/07/2025 | ***SS Train End:*** 07/07/2025 |
| | ***DC Start:*** 06/27/2025 | ***DC End:*** 10/31/2025 |

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|---|---|
| **Other Project Team Members** | Stephanie Chardoul (ISR PI), Marsha Skoman (programmer), Jennie Williams and Asia Paige (data managers) |
| **Other Project Name** | Housing & Children 2025 Locating |
| **Sample Mgmt System** | Project specific system (Excel) |
| **Data Col Tool** | Qualtrics/Illume |
| **Hardware** | Desktop |
| **DE Software** | Qualtrics/Illume |
| **QC Recording Tool** | N/A |
| **Incentive** | Yes, R |
| **Administration** | SRO Group |
| **Payment Type** | Cash, prepaid ($5 per respondent) |
| **Payment Method** | Imprest Cash Fund from ISR Business Office |

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|---|---|---|
| **Report Period** | June, 2025 (HCHD-2025 Locating) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | The project is currently on track, however response to the mailings is lower than had been hoped. Given the delay in the project start (see below), the project end date is now estimated to be November 30, 2025.<br>The HCHD Locating project was delayed due to IRB issues. The JHU Homewood IRB Board cannot serve as a single IRB of record, and UM was unwilling to take on responsibility for all of JHU's activities. SRO worked with JHU to resolve the issues, and the project received an "unregulated" determination at Michigan, and an "exempt" determination at JHU in mid to late May. This allowed JHU to award funding to UM, with all project documents being signed on June 11, and shortcodes set up shortly thereafter.<br>Work began on the HCHD locating project in March and April. SRO specified an Excel file that would serve as a sample management system for use by locators, and began work to program a simple Qualtrics program for collection of direct address updates from respondents. In addition, the Locator positions were posted and Locators | |

were selected for the project. Construction of preload for Qualtrics and the sample management system was worked by the survey director. The project was halted in mid-April when it was clear that the IRB issues would significantly delay receipt of an award at Michigan.
Work restarted in late May 2025 as the award paperwork was received at UM. The Qualtrics application was finalized and tested, and the data managers reviewed the Qualtrics preload and created login ids, passwords and QR codes for the Qualtrics app and for the mailing files. PHA updates were received from the project PI and integrated into the respondent mailing information. An Accurint batch locating update (with deceased search) was processed in mid-June, and results integrated into the sample information given to locators.
The project team secured imprest cash funds for the locating letters. The mailing went out to respondents on June 23. On June 24, an error was discovered in the QR code assignments which meant that a respondents QR code directed the respondent to another person's name, address and contact information. The survey link to the QR code was deactivated before any respondent could log in to the system, so there was no breach of confidentiality. The project team prepared a second mailing. The second mailing was a "reminder" mailing without a TOA but with a corrected Qualtrics link. That mailing was assembled and mailed on July 2.

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|---|---|---|
| **Special Issues** | | |
| **Cost as of** | ***Total Cost to Date (direct + indirect):*** | 0.00 |
| | ***Est Cost at Completion (E$AC):*** | 0.00 |
| | ***Total Budget:*** | 116,930.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 0.00 |
| | ***Reason for Variance:*** | |
| **Projections as of** | ***Dollars Projected for Month:*** | 0.00 |
| | ***Actual Dollars Used:*** | 0.00 |
| | ***Variance (Projected minus Actual):*** | 0.00 |
| | ***Reason for Variance:*** | |

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

**Other Measures**

| | |
|---|---|
| **Project Name** | **(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** | June, 2025 (Health and Well Being in SE | Closing |
| **Risk Level** | On Track | |
| **Monthly Updates** | The DAWN team prepared and delivered data deliverables in June.  Some work began on preparing weights and a sampling report.<br><br>In the process of preparing the data deliverables, two program errors were discovered that impacted a total of 31 cases.  The DAWN SRO team began conducting missing data calling for those two program errors.  In addition to preparing and delivering data, the DAWN SRO team worked on preparing final documentation, prepared an | |

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|---|---|---|
| | interviewer bag for the PIs, packed and inventoried cognitive packets. We still expect to end the project with a small underrun. | |
| **Special Issues** | | |
| **Cost as of Jul 11, 2025** | ***Total Cost to Date (direct + indirect):*** | 3,721,577.41 |
| | ***Est Cost at Completion (E$AC):*** | 3,741,511.12 |
| | ***Total Budget:*** | 3,758,127.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 16,615.88 |
| | ***Reason for Variance:*** | We expect to end the study with a small underrun. The underrun shown here will likely be slightly smaller due to a delay in preparing the sampling weights and sampling reporting, as well as the final project report. |
| **Projections as of Jul 11, 2025** | ***Dollars Projected for Month:*** | 25,810.42 |
| | ***Actual Dollars Used:*** | 19,572.17 |
| | ***Variance (Projected minus Actual):*** | 6,238.25 |
| | ***Reason for Variance:*** | The variance is due to the delay in preparing the sample weights and sample report. |

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

**Other Measures**

| | | | |
|---|---|---|---|
| **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** | June, 2025 (Healthy Brain Project) | Closing |
| **Risk Level** | On Track | |
| **Monthly Updates** | The DAWN team prepared and delivered data deliverables in June. Some work began on preparing weights and a sampling report. | |

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|---|---|---|
| | In the process of preparing the data deliverables, two program errors were discovered that impacted a total of 31 cases. The DAWN SRO team began conducting missing data calling for those two program errors. In addition to preparing and delivering data, the DAWN SRO team worked on preparing final documentation, prepared an interviewer bag for the PIs, packed and inventoried cognitive packets. We still expect to end the project with a small underrun. | |
| **Special Issues** | | |
| **Cost as of Jul 11, 2025** | ***Total Cost to Date (direct + indirect):*** | 1,481,263.20 |
| | ***Est Cost at Completion (E$AC):*** | 1,505,002.96 |
| | ***Total Budget:*** | 1,537,306.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 32,303.04 |
| | ***Reason for Variance:*** | The variance is due to the unexpected efficiency of the convenience sample and the D-AMP CS panel (compared to the historic SRS panel sample). We expect to end the study with a small underrun. |
| **Projections as of Jul 11, 2025** | ***Dollars Projected for Month:*** | 57,287.86 |
| | ***Actual Dollars Used:*** | 50,231.88 |
| | ***Variance (Projected minus Actual):*** | 7,055.98 |
| | ***Reason for Variance:*** | The variance is due to the delay in preparing sample weights and a sampling report, as well as a final project report. |

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

**Other Measures**

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

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|---|---|
| **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** | June, 2025 (Hospitals Sharing Data) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | SSL reminder calling ended on 6/27. We are keeping the survey open through 7/31 to allow additional responses | |

| | | |
|---|---|---|
| | from hospital experts who may have had extended summer out-of-office time scheduled. To date, we have received an additional 11 survey responses since the end of our active reminder protocol at the end of June. We are currently working on prepping study data for the PI and plan to deliver it in August after the survey closes. | |
| **Special Issues** | The PI has requested that the stats group complete some additional statistical weighting for their analysis. We are planning on putting any budget underrun towards helping to complete this additional task. | |
| **Cost as of Jul 23, 2025** | ***Total Cost to Date (direct + indirect):*** | 173,364.20 |
| | ***Est Cost at Completion (E$AC):*** | 194,818.24 |
| | ***Total Budget:*** | 203,554.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 8,735.76 |
| | ***Reason for Variance:*** | We are still waiting for some SSL costs to hit. We may use some of the projected underrun to complete some additional statistical weighting requested by the PI |
| **Projections as of Jul 23, 2025** | ***Dollars Projected for Month:*** | 46,143.78 |
| | ***Actual Dollars Used:*** | 37,880.29 |
| | ***Variance (Projected minus Actual):*** | 8,263.49 |
| | ***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. We may use some extra funds to have the stats group complete some population-bases weighting requested by the PI |

| **Measures** | | **Units at Complete** | **RR** | **HPI** |
|---|---|---|---|---|
| | ***Current Goal:*** | 200 | 32% | N/A |
| | ***Goal at Completion:*** | 200 | 32% | N/A |
| | ***Current Actual:*** | 207 | 32% | |
| | ***Estimate at Complete:*** | 208 | 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** | June, 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 end game protocols.<br>3. Interviewers exceeded expectations for hours and baseline interviews during the month.<br>4. Field Strategies:<br>-Priority sample: To date, 13,054 cases have been flagged priority of which 3,775 (29%) completed interviews.<br>-Endgame sample: To date, 11,713 cases were mailed the endgame letter of which 1,584 (14%) completed interviews.<br>-Web baseline: 815 cases were mailed the web invite. To date, 58 (7.1%) completed the web survey.<br>5. Screening ended 6/28/25 after which interviewers focus will be on Baselines interviews. The last day for baseline interviews is scheduled for 7/26/25.<br><br>*The "measures" table reflects Panel and Baseline combined as of Thursday, 7/24/2025. Breakdown of Panel and Baseline counts and rates in Other Measures Field. | |
| **Special Issues** | We estimate completing 4,638 EGenX iws (138 above the 4500 goal). As noted last month, we went from projecting a 350 interviews shortfall to projecting 138 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 Jul 23, 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 Jul 23, 2025** | ***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:*** | 20,974 | 51% | 12.8 |
| ***Goal at Completion:*** | 22,215 | 44% | 8.3 |
| ***Current Actual:*** | 21,136 | 52% | 12.7 |
| ***Estimate at Complete:*** | 20,912 | 42% | 9.8 |
| ***Variance:*** | 1,303 | 2% | 1.5 |

**Other Measures**

Baselines:
-EGenX generated from screener: Goal: 4,003 iws; Current: 4,130 iws from 13,475 lines spawned; RR: 31%.
-MOC: Goal: 2,000 iws; Final: 2,047 iws (36.4% RR). End date 11/15/2024
-2019 EGenX baselines: Goal: 468 iws, Final: 497 iws (74.4% RR). End date 5/29/2024
Panel: Revised RR Goal: 68% (original goal 74%), Final: 14,441 iws (68% RR). End date 9/2/23

| | | | |
|---|---|---|---|
| **Project Name** | **(HRS 2024) Health and Retirement Study 2024 (On Track)** | | |
| **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 |

| | |
|---|---|
| **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** | June, 2025 (HRS 2024) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | -HRS 2024 activities continued with cost projections, payment processing, letter request processing, endgame | |

mailings, coding, and logging activities.
-Technical work continued around support of data collection, including continued collaboration with CBS on the Blaise 5.14/5.15 sync bug affecting HRS 2024 web non-response interviewers working in the DCA.
-Five interviewers moved from HRS 2022 to HRS 2024 at the beginning of the month.
-Interviewers exceeded expectations for hours and interviews during the month. In addition, 22 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 7/19/2025 (week 62).

**Special Issues**

HRS project staff identified 55 cases that need to be dropped from the 2024 sample as ineligible. These cases had been added to the sample after completing their baseline interview for the 2022 New Cohort project. These cases passed the eligibility confirmation in the baseline interview due to specs given by the PI to the HRS instrument development team.
-19 cases were in interim status and have already been coded as non-sample.
-36 cases have completed interviews. For these, we will recode them with non-sample after which the Blaise data will be removed from the HRS server.

| **Cost as of Jul 23, 2025** | | |
|---|---|---|
| | ***Total Cost to Date (direct + indirect):*** | 18,597,645.07 |
| | ***Est Cost at Completion (E$AC):*** | 20,471,350.71 |
| | ***Total Budget:*** | 21,406,468.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 935,117.29 |
| | ***Reason for Variance:*** | Projections in CRS to reflect the May 28 decision by HRS PIs to extend the HRS 2024 field period to August 30th. The underrun increased from last month due to check voids starting to hit the project and the rate the system generates for interviewer dollar projections went down. |

| **Projections as of Jul 23, 2025** | | |
|---|---|---|
| | ***Dollars Projected for Month:*** | 940,865.20 |
| | ***Actual Dollars Used:*** | 699,965.85 |
| | ***Variance (Projected minus Actual):*** | 240,899.35 |
| | ***Reason for Variance:*** | Variance is primarily due to non-salary categories respondent payments (check voids) as well as as a few salary categories, such as fewer hours than projected charged by SurveyTechs and interviewer bonus's accidentally projected twice. |

**Measures**

| | **Units at Complete** | **RR** | **HPI** |
|---|---|---|---|
| ***Current Goal:*** | 14,122 | 61.9% | 10.2 |
| ***Goal at Completion:*** | 15,795 | 70%* | 9.3 |
| ***Current Actual:*** | 14,497 | 63.6% | 10.2 |
| ***Estimate at Complete:*** | 14,997** | 66%** | 10.1** |
| ***Variance:*** | 798 | 4% | -0.8 |

**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:*** 06/28/2025 |

| | |
|---|---|
| **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** | June, 2025 (HRS2022-Screening) | Closing |
| **Risk Level** | On Track | |
| **Monthly Updates** | Screening ended on 06/28/2025.<br>01/05/25 - 06/28/25<br>Hours projected: 24,400<br>Hours worked: 26,009 (107%)<br><br>Screening goal: 6,887<br>Screening actual: 9,219 in-person (134%) + 1,169 web | |

| | | |
|---|---|---|
| | We have released 28,853 cases to the endgame protocol. 2,478 cases (8.6%) of cases have completed a screener. 259 cases (10.5%) completed via the web, and 2,219 (89.5%) of cases completed in-person. | |
| **Special Issues** | | |
| **Cost as of Jul 11, 2025** | ***Total Cost to Date (direct + indirect):*** | 34,441,998.63 |
| | ***Est Cost at Completion (E$AC):*** | 34,925,269.81 |
| | ***Total Budget:*** | 28,919,242.00 |
| | ***Variance (Total Budget minus- E$AC):*** | -6,006,027.81 |
| | ***Reason for Variance:*** | Projections have been entered through July 2025 (projection of when we would meet the baseline production goal). |
| **Projections as of Jul 11, 2025** | ***Dollars Projected for Month:*** | 504,002.58 |
| | ***Actual Dollars Used:*** | 540,490.64 |
| | ***Variance (Projected minus Actual):*** | -36,488.06 |
| | ***Reason for Variance:*** | Variance largely due to more travel than budgeted. |

| **Measures** | | **Units at Complete** | **RR** | **HPI** |
|---|---|---|---|---|
| | ***Current Goal:*** | 7,017/3,645 HHs | 73% | 3.0 |
| | ***Goal at Completion:*** | | | |
| | ***Current Actual:*** | 8,406/3,890 | 54.4% | 2.88 |
| | ***Estimate at Complete:*** | | | |
| | ***Variance:*** | | | |

**Other Measures**

| | | | |
|---|---|---|---|
| **Project Name** | **(LHMS 2023 Fall) Life History Mail Study Fall 2023 (On Track)** | | |
| **Project Mode** | Primary: Mail Secondary: Telephone | Total of Modes: 2 | |
| **Project Type** | Sponsored Projects | | |
| **Budget** | **Direct Budget**: 371,587.00 | **Indirect Budget:** 133,772.00 | **Total Budget:** 505,359.00 |
| **Principal** | David Weir (SRC) | | |
| **Investigator/Clients** | Jaqui Smith (SRC) | | |
| **Funding Agency** | NIH | | |
| **IRB** | ***HUM#:*** HUM00106904 | | ***Period of Approval:*** 9/29/2023-9/28/2024 |
| **Project Team** | ***Project Lead:*** Gary Hein | | |
| | ***Budget Analyst:*** Cindy Tsao | | |
| | ***Production Manager:*** Ruth B Philippou | | |
| | ***Senior Project Advisor:*** Evanthia Leissou | | |
| | ***Production Manager 1:*** | | |
| | ***Production Manager 2:*** Ruth B Philippou | | |
| **Proposal #** | no data | | |
| **Description** | 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** | June, 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 Jul 23, 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 Jul 23, 2025** | ***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:*** | 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 |

| | |
|---|---|
| **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** | June, 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 Jul 23, 2025** | ***Total Cost to Date (direct + indirect):*** | 242,769.94 |
| | ***Est Cost at Completion (E$AC):*** | 255,405.95 |
| | ***Total Budget:*** | 457,922.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 202,516.05 |
| | ***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 Jul 23, 2025** | ***Dollars Projected for Month:*** | 3,770.34 |
| | ***Actual Dollars Used:*** | 3,869.26 |
| | ***Variance (Projected minus Actual):*** | -98.92 |
| | ***Reason for Variance:*** | Staff coding hours slightly 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:*** 07/10/2025 | ***DC End:*** 10/02/2025 | |
| **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** | June, 2025 (LHMS 2025 Spring) | Implementing |
| **Risk Level** | On Track | |

| | | |
|---|---|---|
| **Monthly Updates** | LHMS 2025 Spring Activities for June:<br><br>1- Submitted changes to IRB application and updated project materials, as requested by IRB reviewers.<br>2- Technical development (meetings/programming/testing/reporting) for Pen/Paper SAQ (Weblog/Webtrak) and Web (WSMS, Blaise, Web Portal) 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<br>7- Mailing materials purchased, SAQ booklets printed by Dataforce.<br>8- Respondent TOA Checks requested, printed and shipped to Dataforce.<br>9- Began printing and assembly of initial mailing | |
| **Special Issues** | Project Launched July 10th, initial mailings dropped in mail on that date. | |
| **Cost as of Jul 23, 2025** | ***Total Cost to Date (direct + indirect):*** | 245,767.99 |
| | ***Est Cost at Completion (E$AC):*** | 550,219.93 |
| | ***Total Budget:*** | 558,781.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 8,561.07 |
| | ***Reason for Variance:*** | High usage staff (SSS, SSI) have slightly lower rate than budgeted. |
| **Projections as of Jul 23, 2025** | ***Dollars Projected for Month:*** | 259,740.07 |
| | ***Actual Dollars Used:*** | 217,574.45 |
| | ***Variance (Projected minus Actual):*** | 42,165.62 |
| | ***Reason for Variance:*** | Launch was delayed until July, therefore logging and other production hours did not meet projections. |

**Measures**

| | Units at Complete | RR | HPI |
|---|---|---|---|
| ***Current Goal:*** | 1658 | 44% | N/A |
| ***Goal at Completion:*** | 1658 | 44% | N/A |
| ***Current Actual:*** | 94 | 2% | 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 | | |

| | | |
|---|---|---|
| **Report Period** | June, 2025 (MTF Base Year 2022_27) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | June 2025<br>We have been preparing systems etc. to begin FTF school recruitment. A small group of interviewers (four) will be assigned schools that they will be responsible for gaining their approval to participate in MTF next year (2026 wave). Last year interviewers involved in this work achieved a slighter higher 'approval' rate than the MTF Recruiters (all TEL/email contacts).<br>We have also begun planning for the MTF 2026 wave - training dates are set, reviewed debrief notes and will be posting for TLs/PC very soon. | |
| **Special Issues** | | |

| | | |
|---|---|---|
| **Cost as of Jul 23, 2025** | ***Total Cost to Date (direct + indirect):*** | 4,374,867.16 |
| | ***Est Cost at Completion (E$AC):*** | 7,027,828.77 |
| | ***Total Budget:*** | 9,778,060.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 2,750,231.23 |
| | ***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. |

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|---|---|---|
| **Projections as of Jul 23, 2025** | ***Dollars Projected for Month:*** | 117,525.07 |
| | ***Actual Dollars Used:*** | 117,019.08 |
| | ***Variance (Projected minus Actual):*** | 505.99 |
| | ***Reason for Variance:*** | Variance was quite low this month. |

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

**Other Measures**

| | | | |
|---|---|---|---|
| **Project Name** | **(MTF Early Panel Pilot) Monitoring the Future: A Cohort-Sequential Panel Study of Drug Use, Ages 19-65 - Administrative Supplement #1 (8/10th Grade Panel) (On Track)** | | |
| **Project Mode** | Primary: Web | | |
| **Project Type** | Sponsored Projects | | |
| **Budget** | **Direct Budget**: 184,954.00 | **Indirect Budget:** 103,575.00 | **Total Budget:** 288,529.00 |
| **Principal Investigator/Clients** | Megan Patrick (ISR, SRC) | | |
| **Funding Agency** | | | |
| **IRB** | ***HUM#:*** 00244359 | | ***Period of Approval:*** |
| **Project Team** | ***Project Lead:*** Donnalee Ann Grey-Farquharson | | |
| | ***Budget Analyst:*** Dean E Stevens | | |
| | ***Production Manager:*** | | |
| | ***Senior Project Advisor:*** Rebecca Gatward | | |
| | ***Production Manager 1:*** Hongyu Johnson | | |
| | ***Production Manager 2:*** | | |
| **Proposal #** | no data | | |
| **Description** | MTF Early Panel study is a study that will survey drug use in 9th and 11th graders who were 8th and 10th graders in 2023 wave baseline recruited samples. SRO will launch the 2024 and 2025 Web survey data collections with an estimated sample size of 600 cases 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) | | |

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

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| | | |
|---|---|---|
| **Report Period** | June, 2025 (MTF Early Panel Pilot) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | We are in the middle of the 2025 data collection period. As of 6/30/2025, 24 students have completed the survey, and 56 parental consents have been received. | |

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|---|---|---|---|
| **Special Issues** | | | |
| **Cost as of Jun 30, 2025** | ***Total Cost to Date (direct + indirect):*** | | 198,247.80 |
| | ***Est Cost at Completion (E$AC):*** | | 284,236.37 |
| | ***Total Budget:*** | | 288,529.00 |
| | ***Variance (Total Budget minus- E$AC):*** | | 4,292.63 |
| | ***Reason for Variance:*** | Staff did not charge full projected hours. | |
| **Projections as of Jun 30, 2025** | ***Dollars Projected for Month:*** | | 8,899.28 |
| | ***Actual Dollars Used:*** | | 8,656.84 |
| | ***Variance (Projected minus Actual):*** | | 242.44 |
| | ***Reason for Variance:*** | Actual costs in June were slightly below projections as some staff did not charge their fully projected hours. | |

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

**Other Measures**

| | | | |
|---|---|---|---|
| **Project Name** | **(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027 (On Track)** | | |
| **Project Mode** | Primary: Web Secondary: Telephone Total of Modes: 2 | | |
| **Project Type** | Sponsored Projects | | |
| **Budget** | **Direct Budget**: 2,496,935.00 | **Indirect Budget:** 1,398,282.00 | **Total Budget:** 3,895,217.00 |
| **Principal Investigator/Clients** | Megan Patrick (UM-SRC) | | |
| **Funding Agency** | | | |
| **IRB** | ***HUM#:*** 00217920 | | ***Period of Approval:*** |
| **Project Team** | ***Project Lead:*** Donnalee Ann Grey-Farquharson | | |
| | ***Budget Analyst:*** Dean E Stevens | | |
| | ***Production Manager:*** Lloyd Fate Hemingway | | |
| | ***Senior Project Advisor:*** Rebecca Gatward | | |
| | ***Production Manager 1:*** | | |
| | ***Production Manager 2:*** Hongyu Johnson | | |
| **Proposal #** | no data | | |
| **Description** | Since 1975 the MTF survey has measured drug and alcohol use and related attitudes among adolescent students nationwide. A nationally representative sample of survey participants report their drug use behaviors across three time periods: lifetime, past year, and past month. The survey is funded by the NIDA, a component of the National Institutes of Health (NIH), and conducted by the University of Michigan. MTF has two linked projects, MTF Main surveys students in schools, and MTF Panel surveys adults across the lifespan.<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) | | |

| | | |
|---|---|---|
| **Report Period** | June, 2025 (MTF Panel 2022-27) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | We are in the middle of 2025 MTF regular panel data collection, including NR calling, which is currently in production. The MTF Regular panel has a total of 18,207 sample cases (including 120 cases found after several years of non-participation). We released 8 replicas in different schedules. As of 6/30/2025, there are 8,236 completes (RR: 45.24%) which is similar to previous year at this time point in data collection. | |
| **Special Issues** | | |
| **Cost as of Jun 30, 2025** | ***Total Cost to Date (direct + indirect):*** | 2,506,749.63 |
| | ***Est Cost at Completion (E$AC):*** | 3,944,502.15 |
| | ***Total Budget:*** | 3,895,217.00 |
| | ***Variance (Total Budget minus- E$AC):*** | -49,285.15 |
| | ***Reason for Variance:*** | We continue to make adjustments to lower the overrun. |
| **Projections as of Jun 30, 2025** | ***Dollars Projected for Month:*** | 132,228.27 |
| | ***Actual Dollars Used:*** | 127,854.67 |
| | ***Variance (Projected minus Actual):*** | 4,373.60 |
| | ***Reason for Variance:*** | Additional NR calling training costs were posted in June. Although regular staff used fewer hours than projected, Survey Tech actual hours were a bit higher than projected. |

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

**Other Measures**

| | | | |
|---|---|---|---|
| **Project Name** | **(NDWS) National Dementia Workforce Study (On Track)** | | |
| **Project Mode** | Primary: Not Available | | |
| **Project Type** | Sponsored Projects | | |
| **Budget** | **Direct Budget**: 4,327,548.00 | **Indirect Budget:** 2,423,425.00 | **Total Budget:** 6,750,973.00 |
| **Principal** | Donovan Maust (Michigan Medicine) | | |
| **Investigator/Clients** | Joanne Spetz (University of California, San Francisco) | | |
| | James Wagner (University of Michigan - Survey Research Center) | | |
| **Funding Agency** | NIA | | |
| **IRB** | ***HUM#:*** | | ***Period of Approval:*** |
| **Project Team** | ***Project Lead:*** Piotr Dworak | | |
| | ***Budget Analyst:*** Nicole Danielle Doher | | |
| | ***Production Manager:*** | | |
| | ***Senior Project Advisor:*** Stephanie A Chardoul | | |
| | ***Production Manager 1:*** Dedra Campbell | | |
| | ***Production Manager 2:*** Lisa S Holland | | |
| **Proposal #** | no data | | |
| **Description** | 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 |

| | | |
|---|---|---|
| **Report Period** | June, 2025 (NDWS) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | June/July activities:<br>* Related to Wave 1 (concluded March 2025): PDMG and TSG were tasked with preparation of the Wave 1 final datasets for release (including weights, annotations, codebooks, and other documentation) via the Linkage / Acumen / NIA enclave platform and a public use file which will be released via NACDA Open Aging Repository. This work required more iterations than expected but still have enough in the budget to cover this work. PIs recognized SRC effort and diligence in the process as well as the scope creep and SRC is going to shore up projections for this work in the next fiscal year Sep 2025 - Aug 2026.<br><br>* Related to Wave 2 (May - December 2025): Most components of Wave 2 have started data collection. RTI started recruitment for Nursing Home and AL agencies as well as Community Clinicians. RTI is about to launch the longitudinal staff follow up with Wave 1 respondents. DLH started recruitment for Home Care agencies and is about to start data collection with another sample type -- Direct Home Care Workers. SRO assistance on Wave 2 is transitioning from help with launching (survey specc'ing and testing, materials, etc.) to reviewing data collection progress (preparing Wave 2 PI reports and review of paradata).<br><br>Financial update: SRC can take advantage of the funds unused in Y1 to add funds to cover extra scope. The request for those funds is being submitted on August 5th.<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 July, 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 Jul 23, 2025** | ***Total Cost to Date (direct + indirect):*** | 1,508,728.06 |
| | ***Est Cost at Completion (E$AC):*** | 6,437,563.06 |
| | ***Total Budget:*** | 6,750,973.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 313,409.94 |
| | ***Reason for Variance:*** | NDWS will be adding 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 Jul 23, 2025** | ***Dollars Projected for Month:*** | 130,751.93 |
| | ***Actual Dollars Used:*** | 107,114.70 |
| | ***Variance (Projected minus Actual):*** | 23,637.23 |
| | ***Reason for Variance:*** | We reduced monthly underrun and expect that with Year 3 sampling work, additional work with data publishing, and additional data analysis requests from PIs we expect the underrun to start decreasing. |

| **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** | June, 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 still considering 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, but HPD is in communication with this single source contact through the state of New York. 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: | |

A pilot sample frame was purchased from MSG in order to perform QC. A couple of issues have been identified with the sample file, including, a. Low/high unit numbers for some buildings in which a range of unit numbers were provided rather than actual unit numbers. When a range is provided, for example 10-20, it is unknown how units are numbered and how many units are there. There could be one number per unit, or units could be numbered with only even numbers. b. Drop points. For buildings that use drop points for mail delivery rather than being delivered to each unit, no unit numbers were provided. The sampling team is investigating ways to resolve these issues. HPD may have administrative data to supplement the MSG sample file.

Recruitment & Hiring:
The mgt team and DCS team continue to meet to define the recruitment strategy for U-M recruits. We have provided the phone screening script and candidate requirements to HPD, however, HPD continues to push back on a couple of criteria such as required hours and need for transportation. SRO has made some concessions, and we think we in agreement. Final forms will be shared with HPD within the next few days. HPD has finalized their agreement with CUNY. Details about when the 'hand off' will occur are still being worked out. Regarding Version Y certifications, the plan is to work with Research Support Services, Inc. (Alisu' Schoua-Glusberg's organization) to complete these.

Training:
Iwer training will be held in Jan, 2026 in NYC. There will be two trainings, back to back at about 4 days each. 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 in person. We are finalizing training content and 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. We have decided which sessions will be Zoom synchronous, and which will be self-study. All links and courses will be accessed via Canvas. A location has not yet been secured. There are two other options that the PI is attempting to coordinate with so that SRO can make the best decision. We will need the space for 10 days, 1 room that can accommodate up to 120 people, and 7 breakout rooms. We will also need a room for supplies and a room for lunch/breaks.

Laptops will be distributed to Iwers at registration so that they can use them for Home Study/GIT/Study Specific Core Sessions. Iwers will also order their article of clothing and other necessary training materials at this time as well. Clothing and laptop bags will be ordered by HPD and include both the HPD and a U-M logo. We are working with the branding dept at U-M to ensure we are following U-M protocols.

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 started. The Tech Leads have completed MSMS training. At this point we expect that we should be on track, however, we have learned there will be major updates to MSMS that will impact our timeline. The Tech Leads believe we should be able to stay on track provided these major updates do not get delayed. If that is the case, these updates will impact integration testing and could mean critical delays in project timeline.

Other:

The HPD press release has been released. HPD has requested a meeting with ISR Communications in order to discuss the press release plan.

| | | | |
|---|---|---|---|
| **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 Jul 23, 2025** | ***Total Cost to Date (direct + indirect):*** | | 103,619.25 |
| | ***Est Cost at Completion (E$AC):*** | | 13,491,336.03 |
| | ***Total Budget:*** | | 13,499,615.00 |
| | ***Variance (Total Budget minus- E$AC):*** | | 8,278.97 |
| | ***Reason for Variance:*** | We continue to assess needs for training staffing in January 2026. This underrun will likely be used for that as well as possible additional costs related to language QC. | |
| **Projections as of Jul 23, 2025** | ***Dollars Projected for Month:*** | | 84,660.95 |
| | ***Actual Dollars Used:*** | | 72,102.86 |
| | ***Variance (Projected minus Actual):*** | | 12,558.09 |
| | ***Reason for Variance:*** | Some staff did not charge for all projected hours. They are being moved forward. | |

| 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** | June, 2025 (PR-PSID) Implementing |
| **Risk Level** | Some Concerns |
| **Monthly Updates** | Training took place in PR from 6/12-6/18. Overall, the training was successful, 17 trainees completed the training. 24 IWERs were originally staffed on the project -- IWER attrition during training was a concern. 4 commented that |

| | | |
|---|---|---|
| | they were intimidated by our home study, and quit before the training. We will need to determine what additional training is required prior to Prod Launch.<br><br>Per PIs, all work was paused on PR-PSID after the training. ETI interviewers returned all of their equipment, and the email and phone accounts were turned off. Minimal hours were worked on the project in July, and these hours will be charged to SRO OH accounts. | |
| **Special Issues** | Funding uncertainty -- NICHD has not yet issued the award letter for continuing the grant. On 7/23, we learned that the award letter may be issued as soon as next week. However, Brown is not being paid by the federal government for work performed, so it is possible that Brown may be unwilling to issue the subaward to U-M, since they would be responsible for backstopping the funds. | |
| **Cost as of Jul 17, 2025** | ***Total Cost to Date (direct + indirect):*** | 850,076.74 |
| | ***Est Cost at Completion (E$AC):*** | 1,437,409.31 |
| | ***Total Budget:*** | 1,292,585.00 |
| | ***Variance (Total Budget minus- E$AC):*** | -144,824.31 |
| | ***Reason for Variance:*** | Direct cost at completion increased by ~5k. The main driver is an overrun in management hours and travel non-sals related to the June training. Future projections were not updated, and will need to be adjusted once funding is reinstated. |
| **Projections as of Jul 17, 2025** | ***Dollars Projected for Month:*** | 66,769.89 |
| | ***Actual Dollars Used:*** | 40,922.88 |
| | ***Variance (Projected minus Actual):*** | 25,847.09 |
| | ***Reason for Variance:*** | All June charges were moved to the RSF account. Projections remained on the PR budget. Some Mgt and travel non-sal costs projected in June have not hit yet. These hours were projected in July on the RSF budget. |

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

**Other Measures**

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

| **Milestones** | | |
|---|---|---|
| | ***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** | June, 2025 (PSID CDS23 Phase 2) | Closing |
| **Risk Level** | On Track | |
| **Monthly Updates** | Minimal on-going work.<br><br>Management team finished QC of WebLog data. SRO prepared a manifest and began conducting physical QC of the consent forms -- confirming that all logged consent forms were accounted for.<br><br>Final data delivery scheduled for late July. Minimal projections added for Mgt in August to close out the project. | |

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|---|---|---|
| **Special Issues** | | |
| **Cost as of Jul 23, 2025** | ***Total Cost to Date (direct + indirect):*** | 1,426,222.85 |
| | ***Est Cost at Completion (E$AC):*** | 1,440,502.84 |
| | ***Total Budget:*** | 2,524,678.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 1,084,175.16 |
| | ***Reason for Variance:*** | Future projections are still being updated -- added minimal hours for Management for close out tasks and for DMSS to finalize reports. |
| **Projections as of Jul 23, 2025** | ***Dollars Projected for Month:*** | 13,744.01 |
| | ***Actual Dollars Used:*** | 14,036.11 |
| | ***Variance (Projected minus Actual):*** | -292.10 |
| | ***Reason for Variance:*** | Data management hours were slightly 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** | **(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) | | |

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|---|---|---|
| **Report Period** | June, 2025 (PSID25) | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | Summary of June 2025 activities:<br><br>Tech:<br>PSID25 continues to have on-going MSMS Core tech issues. We are in communication with TSG leadership and are monitoring their impact on the project. We reset our first two completed interviews, that had been completed by the wrong respondent. Tested remaining Spanish templates -- all templates have been released to Production. One SID needed to be restored from the audit data -- this was the first restored interview this wave.<br><br>Training:<br>The training team successfully completed the T3 training on 6/3 - 6/10. The training began with 47 Iwers and 3 new TLs (the largest of the PSID trainings this year). 1 interviewer attrited prior to training, 2 interviewers left during T3, 1 interviewer left after training, and 1 interviewer did not successfully certify. The training focused exclusively on DCA and 68ID Site, and there was no Family Listing and interview training. Some interviewers expressed concerns about this new interviewing role, and were disappointed to not be trained on conducting the interview. Additionally, one T2 interviewer was not able to fulfill the project commitment and left the project.<br><br>Sample Release / Interventions:<br>English Release 4 (n=2,777) began the WSO protocol in early June, with their WSO to start in early June. English Release 5 (n=2,480) began the WSO scheduled the last week of June. On nearly a weekly basis, newly generated splitoff sample is released. The end game protocol will begin for Web Rel 1 in early July.<br><br>IRB:<br>As noted in the May MPR, we submitted an ORIO because three WSO templates were programmed with the wrong incentive block. The ORIO was acknowledged on 6/11/25. | |
| **Special Issues** | | |
| **Cost as of Jul 23, 2025** | ***Total Cost to Date (direct + indirect):*** | 3,554,860.17 |
| | ***Est Cost at Completion (E$AC):*** | 7,440,206.06 |
| | ***Total Budget:*** | 7,805,285.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 365,078.94 |
| | ***Reason for Variance:*** | Reduced management projections (shifted hours from senior management to SSAs based on upcoming tasks), and reduced printing non-sals, based on estimates for future printing costs. PIs desire to keep the underrun (~$245K direct). |
| **Projections as of Jul 23, 2025** | ***Dollars Projected for Month:*** | 618,328.89 |
| | ***Actual Dollars Used:*** | 580,834.51 |
| | ***Variance (Projected minus Actual):*** | 37,494.38 |
| | ***Reason for Variance:*** | Underrun mainly due to tech support and IWER III actuals coming in less than projected. Mgt is looking into IWER actuals and will make adjustments to future projections. |

**Measures**

| | **Units at Complete** | **RR** | **HPI** |
|---|---|---|---|
| ***Current Goal:*** | | | |
| ***Goal at Completion:*** | 9994 | 89% | 4.73 |
| ***Current Actual:*** | 4944 | 48.9 | 2.51 |
| ***Estimate at Complete:*** | 9994 | 89% | 4.73 |
| ***Variance:*** | | | |

**Other Measures**

Note: Current actual metrics based on the Dashboard with the week ending on 6/28/25.
'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** | June, 2025 (SAFEGUARD) | | Planning |
| **Risk Level** | On Track | | |
| **Monthly Updates** | In June, our attention is focused on refining the Life Force instrument in preparation for production that could start in mid August. Testing Blaise and making tweaks and changes have been a priority along with creating WSMS reporting. In addition, MSMS planning and spec writing is in process. Pathfinding specifications have been finalized and testing is underway. Life Skills Training Blaise specifications have been completed and programming is in progress (this survey is largely the same as Life Force). | | |
| **Special Issues** | | | |
| **Cost as of Jun 30, 2025** | ***Total Cost to Date (direct + indirect):*** | | 251,146.56 |
| | ***Est Cost at Completion (E$AC):*** | | 3,513,718.27 |
| | ***Total Budget:*** | | 3,433,360.00 |
| | ***Variance (Total Budget minus- E$AC):*** | | -80,358.27 |
| | ***Reason for Variance:*** | The projected overrun is largely due to projected PDMG resources that were initially projected high due to a larger sample size during the outset of the project. This overrun will no longer be present as we refine projections in the coming month. | |
| **Projections as of Jun 30, 2025** | ***Dollars Projected for Month:*** | | 78,119.32 |
| | ***Actual Dollars Used:*** | | 62,395.03 |
| | ***Variance (Projected minus Actual):*** | | 15,724.29 |
| | ***Reason for Variance:*** | Total hours were close to projections in June but there was some cost variance. Data manager hours in particular are still lower than expected given delays to the production start that have continued. Most hours have been associated with Blaise development and testing. | |

| **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:*** |

| | |
|---|---|
| **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** | June, 2025 (SCA Web 2025) | Initiation |
| **Risk Level** | On Track | |
| **Monthly Updates** | During the June 2025 calendar month, SCA coding processed 1118 cases with an additional 126 cases for IRR (total of 1,244 cases, 10.1% of cases selected for check coding). The number of cases associated with June 2025 represent the third highest number of cases in a calendar month thus far in calendar year 2025. | |

| | | |
|---|---|---|
| | Overall, coder efficiency for the month saw improved efficiency during the June calendar month as coders averaged 5.3 minutes per case. | |
| **Special Issues** | | |
| **Cost as of Jul 11, 2025** | ***Total Cost to Date (direct + indirect):*** | 54,949.93 |
| | ***Est Cost at Completion (E$AC):*** | 117,115.40 |
| | ***Total Budget:*** | 136,554.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 19,438.60 |
| | ***Reason for Variance:*** | Overall, programming and technical support have consistently come in under budget and coding costs have come in over or close to projected costs. |
| **Projections as of Jul 11, 2025** | ***Dollars Projected for Month:*** | 10,757.83 |
| | ***Actual Dollars Used:*** | 9,963.91 |
| | ***Variance (Projected minus Actual):*** | 793.92 |
| | ***Reason for Variance:*** | During the June 2025 calendar month, coding costs came in slightly over projected costs, and programming and technical support came in under budget. |

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

**Other Measures**

| | |
|---|---|
| **Project Name** | **(SCIP 2024) Sustainability Cultural Indicators Project (On Track)** |
| **Project Mode** | Primary: Web  Total of Modes: 1 |
| **Project Type** | Sponsored Projects |
| **Budget** | **Direct Budget**: 137,834.00  **Indirect Budget:** 0.00  **Total Budget:** 137,834.00 |
| **Principal** | John Callewaert, Co-PI (SRC, College of Engineering ) |
| **Investigator/Clients** | Robert Marans, Co-PI (SRC) |
| | Noah Webster, Co-PI (SRC) |
| **Funding Agency** | U-M |
| **IRB** | ***HUM#:*** HUM00260230  ***Period of Approval:*** |
| **Project Team** | ***Project Lead:*** Donnalee Ann Grey-Farquharson |
| | ***Budget Analyst:*** David Kellermeyer |
| | ***Production Manager:*** |
| | ***Senior Project Advisor:*** Shonda R Kruger-Ndiaye |
| | ***Production Manager 1:*** James Koopman |
| | ***Production Manager 2:*** Hongyu Johnson |
| **Proposal #** | no data |
| **Description** | SCIP 2024 is the 7th wave of the project since its inception in 2012. The SCIP (Sustainability Cultural Indicators Project) is a multi-year project designed to measure and track the culture of sustainability, originally on the U-M Ann Arbor campus. In Fall 2021, SCIP expanded to include the U-M Flint and U-M Dearborn campuses, making Fall 2021 the most recent wave of the project. For the 2024 data collection, SRO will continue to use Qualtrics software for the web survey instrument. The basic sampling and methodological design of the project will be similar to that of the 2021 wave. For all three campuses the sample will include freshmen, sophomore, juniors, seniors and graduate students, as well as faculty and staff. In addition, for the Ann Arbor campus there is the addition of a panel with the re-interview of freshmen from 2021, who are now seniors in the fall of 2024.<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** | June, 2025 (SCIP 2024) | | Closing |
| **Risk Level** | On Track | | |
| **Monthly Updates** | We delivered the final methodology report to the PIs in June. One regular staff member needs a few more hours to work on data tasks for the PIs through July. | | |
| **Special Issues** | | | |
| **Cost as of Jun 30, 2025** | ***Total Cost to Date (direct + indirect):*** | | 122,705.53 |
| | ***Est Cost at Completion (E$AC):*** | | 123,060.41 |
| | ***Total Budget:*** | | 137,834.00 |
| | ***Variance (Total Budget minus- E$AC):*** | | 14,773.59 |
| | ***Reason for Variance:*** | We have projected hours into July for one staff member who is working on the final data delivery tasks. | |
| **Projections as of Jun 30, 2025** | ***Dollars Projected for Month:*** | | 1,790.30 |
| | ***Actual Dollars Used:*** | | 1,757.65 |
| | ***Variance (Projected minus Actual):*** | | 32.65 |
| | ***Reason for Variance:*** | Fewer hours were charged than projected. | |

| **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** | June, 2025 (SRS 2021) | Closing |
| **Risk Level** | On Track | |
| **Monthly Updates** | The DAWN team prepared and delivered data deliverables in June. Some work began on preparing weights and a sampling report.<br><br>In the process of preparing the data deliverables, two program errors were discovered that impacted under 5 cases | |

| | | |
|---|---|---|
| | on SRS. The DAWN SRO team began conducting missing data calling for those two program errors. In addition to preparing and delivering data, the DAWN SRO team worked on preparing final documentation, prepared an interviewer bag for the PIs, packed and inventoried cognitive packets. We still expect to end the project with a very small underrun. | |
| **Special Issues** | | |
| **Cost as of Jul 11, 2025** | ***Total Cost to Date (direct + indirect):*** | 6,129,573.49 |
| | ***Est Cost at Completion (E$AC):*** | 6,136,452.25 |
| | ***Total Budget:*** | 6,141,810.11 |
| | ***Variance (Total Budget minus- E$AC):*** | 5,357.86 |
| | ***Reason for Variance:*** | The variance is less than 1% of the total project costs. We do expect the use most of the project budget. |
| **Projections as of Jul 11, 2025** | ***Dollars Projected for Month:*** | 15,061.61 |
| | ***Actual Dollars Used:*** | 13,661.99 |
| | ***Variance (Projected minus Actual):*** | 1,399.62 |
| | ***Reason for Variance:*** | This variance is insignificant. |

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

**Other Measures**

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

**Monthly Updates**

Project Management and Planning:
• Budget/Funding:
o With the Year 6 hardship (pre-award spending) approved, Bill set up new account codes for staff to charge time and expenses. Additionally, he completed the analysis of what costs need to move from the old to new accounts. Emails were sent to staff asking them to move hours from March, April and/or May hours in the timekeeping system to the new accounts. After all of the hours are moved appropriately, it will bring the Year 5 (and 2020-2025 5-year budget period) to a zero balance and Bill will be able to close it out.
o U-M ORSP and HJF continued negotiations on the Year 6 award. Also see the Areas of Risk, Mitigation Strategies section.
• Proposal:
o The formal budget for Years 6-10 (March 1, 2025 – February 28, 2030) was sent to Dr. Ursano on June 3.
o On June 9, Dr. Shor (USUHS) requested a budget for having U-M conduct approximately 30-50 qualitative interviews with LS sample members for a research proposal focused on active duty service women and support force readiness. The aim is to better understand how post concussive symptoms following mild traumatic brain injury and subsequent mental health issues impact service-related functioning and suicide risk. U-M provided a ballpark estimate to Dr. Shor on June 16. On June 24, we learned that unfortunately Dr. Shor had not been invited to submit a full proposal.
• 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 continued under review at USUHS.
o An amendment for the change of USUHS PI was submitted on the Wave 5 protocol on June 26.

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 NDI application was transitioned from Dr. Ursano to Dr. Benedek as PI. The CDC communicated the updates that would be needed, requesting they be done within 30 days. Dr. Benedek communicated back that the IRB amendments and updated confidentiality agreements will take longer than 30 days.
o The CDC confirmed both the U-M and USUHS IRB approvals will be needed and that USUHS will need to provide a reliance agreement. We encountered this last year – there is not a reliance agreement. We will send the same explanation that we provided last year regarding the U-M/USUHS IRB relationship when we upload the IRB documents and submit the application.
o Meredith made updates/confirmed info in the NDI online application and sent new confidentiality agreements to all parties for signature on July 2.
• Collaboration with ORISE fellow, Dr. Dias, working with Dr. Jarvis of Army G-9/DPRR: Processing of the DUA between HJF and Dr. Dias continued.
• The team continued work on address geocoding steps for Wave 3 and 4 respondent addresses, where their addresses have changed from previous survey administrations.
• Lisa Lew worked on updating the blood/survey count tables for USUHS. Numbers for collected survey and blood for Waves 3 and 4 in the Blood Counts for Unique Participants Tables 2 and 3 (LS and LS Public Use release) will be added.
• 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 Onboarding to the enclave was started for one U-M staff member.
o Onboarding to GLC was completed for an analyst who will be working with Dr. Nock and Dr. Stein.
• Biomarker group request for assistance:
o The team assisted Dr. Stein with identifying the location of ancestry and meta-analysis output files generated by biomarker analysts.
o USUHS/CHIRP analysis using WGS and Army/DoD admin data:
? We learned that it is not feasible to move genetic data to the enclave to carry out a targeted analysis. The PIs/research team may seek a waiver and request permission from the Army to allow a limited set of the admin data needed for the analysis to be moved out of 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 learned that a merge error had occurred in the LSW1 dataset at ICPSR when we requested that 5 variables be updated at the time of releasing LSW2. Records with the new values for the 5 variables were appended instead of merged with the original dataset. The data is not incorrect but it is represented in 2 rows for each respondent. ICPSR has added a note to the study page and will implement a fix over the coming months.
• 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 July 3, 2025, are as follows:
o Replicates released: 7 of 14 released with 7,277 sample lines.
o Completed interviews: 4,824 (4,656 web; 168 phone)
o Replicate 5 ended production on June 18 with a final response rate of 75%, which is on par with the average of Replicates 1-4 (74.7%). As a result, the overall response rate for completed replicates increased by a tenth of a percentage point to 74.8%.
o By the end of June, Replicate 6 had transitioned to Phase 4. The response rate had been tracking slightly below the average, but by the end of the month, it was 61.1% and tracking with the average rate.
o Replicate 7 was released on June 16 with letters mailed to 1,075 participants. It had moved into Phase 2 by the end of the month. The response rate was 32.8% and tracking with the average rate.
o The response rate for completed replicates (Reps 1-5) is 74.8%.

Safety Plan Results:
• The Wave 5 combined Safety Plan rate was 12.2% as of June 1:
o Army Chaplains:
? 1,469 (# started IW), 1,401 (# completed IW), 111 (safety plan checks), 7.6% activation rate
o U-M CCP:
? 3,567 (# started IW), 3,423 (# completed IW), 496 (safety plan checks), 14.1% 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 was received.
o The Year 6 subaward processing continues with U-M ORSP and HJF. As of the date of this report, it looks like ORSP needs to take the next steps (form completion and signatures). SRC's approval of a hardship was limited to an initial three months. The start letter was dated April 1 so the actual Year 6 subaward would ideally have been in place by July 1, 2025. However, given the subaward is with ORSP and it is in their hands to move it forward, we do not think there will be a problem with continuing to spend on the hardship. We are monitoring the progress of the subaward closely.

| **Cost as of May 31, 2025** | | |
|---|---|---|
| | ***Total Cost to Date (direct + indirect):*** | 14,379,180.76 |
| | ***Est Cost at Completion (E$AC):*** | 14,379,180.76 |
| | ***Total Budget:*** | 13,730,116.00 |
| | ***Variance (Total Budget minus- E$AC):*** | -649,064.76 |
| | ***Reason for Variance:*** | Feb 28, 2025 marked the end of the 2020-2025 5-year scope of work and budget. In May, we spent $327,977. This amount plus $321,088 from April that was spent over and above the available no cost extension funds ($649,065 total) is an overrun amount that Bill and ORSP are working to move to the Year 6 hardship account (1st year of new 5-year period) which became available in June. |

| **Projections as of May 31, 2025** | | |
|---|---|---|
| | ***Dollars Projected for Month:*** | 0.00 |
| | ***Actual Dollars Used:*** | 327,977.05 |
| | ***Variance (Projected minus Actual):*** | -327,977.05 |
| | ***Reason for Variance:*** | Feb 28, 2025 marked the end of the 2020-2025 5-year scope of work and budget. In May, we spent $327,977 in addition to $321,088 spent in April over and above the available no cost extension funds ($649,065 total)<br><br>Placeholder projections in the CRS sandbox estimated we would spend $324,768 which was very close to actuals.<br><br>The remaining Wave 5 projections (through April 2027) were moved from RFT/CRS sandbox into CRS. However, the budget entered into CRS is for the full 2025-2030 scope now that that full 5-year period has been formally budgeted. We are working on adding in the projections for Wave 6 (through February 2030). |

| **Measures** | | **Units at Complete** | **RR** | **HPI** |
|---|---|---|---|---|
| | ***Current Goal:*** | 10,689 | 72% | 12.0 |
| | ***Goal at Completion:*** | 10,689 | 72% | 12.0 |
| | ***Current Actual:*** | 4,824 | 74.8% (Reps 1-5) | 17.9 |
| | ***Estimate at Complete:*** | 10,689 | 72% | 12.0 |
| | ***Variance:*** | 0 | 0 | 0 |

**Other Measures**

Stats as of 7/3/25. All goals need to be reviewed and possibly updated.

| | | | |
|---|---|---|---|
| **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:*** |

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|---|---|
| **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** | June, 2025 (WaISS) | Planning |
| **Risk Level** | On Track | |
| **Monthly Updates** | Web Survey Pretest<br>-In June, we conducted a web survey pretest to collect enough data to assess production outcomes and data quality. Jeffrey designed the production timeline and plans, including experiments to compare two incentive amounts and compare two survey versions.<br>-Marsha programmed new parts of the survey since the focus groups. Jennie created and loaded preload. Marsha, Jeffrey, and the PIs tested the survey in Qualtrics.<br>-Jeffrey created outreach materials and sent invitation and reminder emails using Qualtrics.<br>-The pretest was conducted from 6/18-6/27. We collected 88 started and 73 completed surveys. The final response rate was 14.4%, which was higher than the 11.6% projected Wave 1 final response rate, but the pretest only involved four emails to the students' college email addresses. | |

Data Analysis
-Jeffrey and Wen began working on the data analysis spec together.

| | | |
|---|---|---|
| **Special Issues** | Judging on the pretest and CCS findings, we anticipate a higher response rate this fall than what was originally proposed. With input from Raphael, Jeffrey created several production design proposals to accommodate the new assumptions and was able to retain most of the calling hours and incorporate responsive survey design elements. The design will allow for flexibility, with several decision points at which we could either shorten or extend production based on response rates and data quality that we will be monitoring. | |
| **Cost as of Jul 17, 2025** | ***Total Cost to Date (direct + indirect):*** | 40,561.35 |
| | ***Est Cost at Completion (E$AC):*** | 279,486.28 |
| | ***Total Budget:*** | 1,002,656.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 4,150.72 |
| | ***Reason for Variance:*** | The variance reported is based on the Year 1 budget total: $283,637. We updated the budget to adjust respondent payment assumptions, which will now vary depending upon production phase and token experiment group. We reduced calling effort to fit within the updated production design with increased completion assumptions. |
| **Projections as of Jul 17, 2025** | ***Dollars Projected for Month:*** | 11,535.34 |
| | ***Actual Dollars Used:*** | 10,215.08 |
| | ***Variance (Projected minus Actual):*** | 1,320.26 |
| | ***Reason for Variance:*** | Completion counts and respondent payments for the pretest were lower than projected. |

| **Measures** | | **Units at Complete** | **RR** | **HPI** |
|---|---|---|---|---|
| | ***Current Goal:*** | 2320 | 23% | |
| | ***Goal at Completion:*** | 2320 | 23% | |
| | ***Current Actual:*** | 0 | 0% | |
| | ***Estimate at Complete:*** | 2320 | 23% | |
| | ***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 | Jun |
|---|---|---|---|---|---|---|---|---|---|
| *TSME25 Blaise 5 (423562)* | Initiatives | Closing | Karl A Dinkelmann | | | | | | |
| *TSME25 DCO Systems Support (483248)* | Initiatives | Implementing | 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 | Closing | 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 | Closing | Mark Simonson | | | | | | |
| *TSME25 Translation Tool (483424)* | Initiatives | Closing | 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:*** |

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|---|---|
| **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** | June, 2025 (TSME25 Blaise 5 (423562)) | Closing |
| **Risk Level** | On Track | |
| **Monthly Updates** | As we conclude this fiscal year's work and prepare for the next one, we are investigating the cause of the significant performance discrepancy between Statistics Netherlands and our system. We suspect there may have been an issue with the server setup, but it does not fully account for the size of the gap we observed. Although there has been significant improvement, several potential factors may explain some of the minimal differences, such as the use of virtual machines versus physical machines. However, these factors do not nearly account for the entire discrepancy. We should further explore the differences in how our SQL backend is configured compared to theirs. While a direct comparison is challenging, there appear to be opportunities for improvement. Additionally, we need to establish a baseline test for newer versions of Blaise to identify any differences they may introduce on | |

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|---|---|---|
| | our side. Moving forward, our goal is to develop more comprehensive testing for our larger instruments, which can be integrated into project funding, as the specific study heavily influences the test results. We are also reviewing our findings to formulate new recommendations for server setups, placing greater emphasis on CPUs rather than merely the number of machines. All this to say, the work continues to make our server environments more robust. | |
| **Special Issues** | | |
| **Cost as of Jul 23, 2025** | ***Total Cost to Date (direct + indirect):*** | 9,682.73 |
| | ***Est Cost at Completion (E$AC):*** | 9,682.73 |
| | ***Total Budget:*** | 10,000.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 317.27 |
| | ***Reason for Variance:*** | A slight underrun is noted based on discrepancies between projections and actuals. |
| **Projections as of Jul 23, 2025** | ***Dollars Projected for Month:*** | 2,669.81 |
| | ***Actual Dollars Used:*** | 2,343.97 |
| | ***Variance (Projected minus Actual):*** | 325.84 |
| | ***Reason for Variance:*** | na |

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

**Other Measures**

| | | | |
|---|---|---|---|
| **Project Name** | **(TSME25 DCO Systems Support (483248)) TSME25 DCO Systems Support (483248) (On Track)** | | |
| **Project Mode** | Primary: Not Available | | |
| **Project Type** | Developmental Initiatives | | |
| **Budget** | **Direct Budget**: 40,000.00 | **Indirect Budget:** 0.00 | **Total Budget:** 40,000.00 |
| **Principal Investigator/Clients** | | | |
| **Funding Agency** | | | |
| **IRB** | ***HUM#:*** | | ***Period of Approval:*** |
| **Project Team** | ***Project Lead:*** Vivienne Y Outlaw | | |
| | ***Budget Analyst:*** Ivanna Iavorska-Em | | |
| | ***Production Manager:*** | | |
| | ***Senior Project Advisor:*** | | |
| | ***Production Manager 1:*** | | |
| | ***Production Manager 2:*** | | |
| **Proposal #** | no data | | |
| **Description** | To be determined | | |
| **SRO Project Period** | 07/2024 - 06/2025 | | |
| **Data Col Period** | | | |
| **Security Plan** | NA | | |

| **Milestones** | | |
|---|---|---|
| | ***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** | June, 2025 (TSME25 DCO Systems | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | - Added new module to download ETSP data for reporting purposes.<br>- Modified Staff Notification Email templates.<br>- Investigated the requirement to upload TT Candidate_Id to TT. | |
| **Special Issues** | | |
| **Cost as of Jul 11, 2025** | ***Total Cost to Date (direct + indirect):*** | 39,638.37 |
| | ***Est Cost at Completion (E$AC):*** | 39,638.37 |
| | ***Total Budget:*** | 40,000.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 361.63 |
| | ***Reason for Variance:*** Staff time allocated to support production work. | |
| **Projections as of Jul 11, 2025** | ***Dollars Projected for Month:*** | 5,174.24 |

| | | |
|---|---|---|
| | ***Actual Dollars Used:*** | 3,462.65 |
| | ***Variance (Projected minus Actual):*** | 1,711.59 |
| | ***Reason for Variance:*** | Staff time allocated to support production work. |

| **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** | June, 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 Jul 11, 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 Jul 11, 2025** | ***Dollars Projected for Month:*** | 0.00 |
| | ***Actual Dollars Used:*** | 0.00 |

| | | |
|---|---|---|
| | ***Variance (Projected minus Actual):*** | 0.00 |
| | ***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:*** | |

| | |
|---|---|
| **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** | June, 2025 (TSME25 MSMS Performance | | Implementing |
| **Risk Level** | On Track | | |
| **Monthly Updates** | Work is proceeding | | |
| **Special Issues** | | | |
| **Cost as of Jul 11, 2025** | ***Total Cost to Date (direct + indirect):*** | | 73,448.07 |
| | ***Est Cost at Completion (E$AC):*** | | 73,448.07 |
| | ***Total Budget:*** | | 100,000.00 |
| | ***Variance (Total Budget minus- E$AC):*** | | 26,551.93 |
| | ***Reason for Variance:*** | Update | |
| **Projections as of Jul 11, 2025** | ***Dollars Projected for Month:*** | | 6,984.40 |
| | ***Actual Dollars Used:*** | | 5,392.11 |

| | | |
|---|---|---|
| | ***Variance (Projected minus Actual):*** | 1,592.29 |
| | ***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:*** | |

| | |
|---|---|
| **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** | June, 2025 (TSME25 ODS Data Dictionary ) | Closing |
| **Risk Level** | On Track | |
| **Monthly Updates** | DMRS has a proof of concept of a website that will list all of the API"s available from ODS sandbox and will display the information on an easy to view HTML file launched from the website. ODS will store in a database table all pertinent info regarding the API's to proivde ONE central source only that needs to be maintained.<br><br>The HTSM pages launched by the website will include the following items:<br><br>1. Basic description of the API in language easy to understand for any type of user<br>2. Required input paramters and their descriptions<br>3. Option input parametrs and their descriptions<br>4. Example of how to invoke the API<br><br>Team continues to work on adding this information into the ODS system so that enough is available to release to users for use in fY2026. | |
| **Special Issues** | | |

| | | |
|---|---|---|
| **Cost as of Jul 11, 2025** | ***Total Cost to Date (direct + indirect):*** | 4,758.81 |
| | ***Est Cost at Completion (E$AC):*** | 4,758.81 |
| | ***Total Budget:*** | 4,500.00 |
| | ***Variance (Total Budget minus- E$AC):*** | -258.81 |
| | ***Reason for Variance:*** minimal variance. | |
| **Projections as of Jul 11, 2025** | ***Dollars Projected for Month:*** | 3,981.45 |
| | ***Actual Dollars Used:*** | 4,259.32 |
| | ***Variance (Projected minus Actual):*** | -277.87 |
| | ***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**

| | | | |
|---|---|---|---|
| **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:*** |

| | |
|---|---|
| **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** | June, 2025 (TSME25 QC Systems | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | Project was not able to charge the remaining $3,242.07. This was mostly due to resouce constrains this past fiscal year. Programmer was very busy. However, we were please to implement new categories into OLIVE and expect to relaese in July to users. | |
| **Special Issues** | | |

| **Cost as of Jul 11, 2025** | | |
|---|---|---|
| | ***Total Cost to Date (direct + indirect):*** | 31,757.93 |
| | ***Est Cost at Completion (E$AC):*** | 31,757.93 |
| | ***Total Budget:*** | 35,000.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 3,242.07 |
| | ***Reason for Variance:*** | We will not be able to spend the $2,416.24. Programmer was too busy doing other production work. |

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|---|---|---|
| **Projections as of Jul 11, 2025** | ***Dollars Projected for Month:*** | 7,827.57 |
| | ***Actual Dollars Used:*** | 6,292.75 |
| | ***Variance (Projected minus Actual):*** | 1,534.82 |
| | ***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 | | |

| **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** | June, 2025 (TSME25 System Maintenance | Implementing |
| **Risk Level** | On Track | |
| **Monthly Updates** | • Password encryption (ST Admin, ST Employee Data Merge, batch jobs)<br>• ST Admin 11 & 25 (termination processes, updates, general work)<br>• SurveyTrak updates (build 18.0.3, file transfer issues, JSON logs for Splunk)<br>• Team Dynamix queries in SRSM<br>• Modifications to DB Extractor and SRMS testing<br>• RCLS tasks<br>• Modifications to Web Logging 25 and Supplemental Export 25<br>• Compare tEmployee table ST11/ST25<br>• ST/PB Build Team meetings including meetings with Tech Support<br>• Moving SurveyTrak Reporting System (SRS) reports to the latest version of Adobe<br><br>Software Development and Testing<br>-ST Patch/ST Builder<br>-ST25 Regression Testing Review | |

| | | |
|---|---|---|
| | -FileSync Testing<br><br>Meetings and Team Activities<br>-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 Jul 23, 2025** | ***Total Cost to Date (direct + indirect):*** | 79,068.50 |
| | ***Est Cost at Completion (E$AC):*** | 79,068.50 |
| | ***Total Budget:*** | 35,000.00 |
| | ***Variance (Total Budget minus- E$AC):*** | -44,068.50 |
| | ***Reason for Variance:*** see below | |
| **Projections as of Jul 23, 2025** | ***Dollars Projected for Month:*** | 2,441.87 |
| | ***Actual Dollars Used:*** | 414.33 |
| | ***Variance (Projected minus Actual):*** | 2,027.54 |
| | ***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**

| | | | |
|---|---|---|---|
| **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** | June, 2025 (TSME25 Team Dynamix | Initiation |
| **Risk Level** | On Track | |
| **Monthly Updates** | Warp up of API for determining ST S/R status for halting notifications during hardware returns and vacation. | |
| **Special Issues** | | |
| **Cost as of** | ***Total Cost to Date (direct + indirect):*** | 0.00 |
| | ***Est Cost at Completion (E$AC):*** | 0.00 |
| | ***Total Budget:*** | 21,000.00 |
| | ***Variance (Total Budget minus- E$AC):*** | 0.00 |
| | ***Reason for Variance:*** | |
| **Projections as of** | ***Dollars Projected for Month:*** | 0.00 |
| | ***Actual Dollars Used:*** | 0.00 |

| | | |
|---|---|---|
| | ***Variance (Projected minus Actual):*** | 0.00 |
| | ***Reason for Variance:*** | |

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

**Other Measures**

| | | | |
|---|---|---|---|
| **Project Name** | **(TSME25 TEAM LOCATION (424466)) TSME25 TEAM LOCATION (424466) (On Track)** | | |
| **Project Mode** | Primary: Not Available | | |
| **Project Type** | Developmental Initiatives | | |
| **Budget** | **Direct Budget**: 0.00 | **Indirect Budget:** 0.00 | **Total Budget:** 0.00 |
| **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:*** |

| | |
|---|---|
| **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** | June, 2025 (TSME25 TEAM LOCATION | Closing |

| | | |
|---|---|---|
| **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 Jul 11, 2025** | ***Total Cost to Date (direct + indirect):*** | 25,554.77 |
| | ***Est Cost at Completion (E$AC):*** | 25,554.77 |
| | ***Total Budget:*** | 0.00 |
| | ***Variance (Total Budget minus- E$AC):*** | -25,554.77 |
| | ***Reason for Variance:*** CRS has not been updated | |
| **Projections as of Jul 11, 2025** | ***Dollars Projected for Month:*** | 1,129.70 |
| | ***Actual Dollars Used:*** | 1,213.95 |
| | ***Variance (Projected minus Actual):*** | -84.25 |
| | ***Reason for Variance:*** Minimal variance | |

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

**Other Measures**

| | | | |
|---|---|---|---|
| **Project Name** | **(TSME25 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** | June, 2025 (TSME25 Translation Tool | Closing |
| **Risk Level** | On Track | |
| **Monthly Updates** | The final phase of developing the translation tool focused on creating a simple, effective, and intuitive user interface for the XLIFF files generated by the tool. The Graphic User Interface (GUI) provides a workspace for translation teams and project staff to edit relevant texts directly, without the need to modify the XLIFF files manually. The GUI allows users to input any necessary text for completing the translation workflow, including UTF-8 language texts and XML-formatted markup for use in Blaise (e.g., Interviewer input text and line breaks). | |

This functionality enables translators to carry out screen formatting in addition to translating text. While the GUI is simple at this stage, it could serve as the foundation for an expansion and refinement initiative in FY26. This initiative aims to add additional features based on feedback from field usage in studies such as NYCHVS and WMH-CIDI, among others.

| | | |
|---|---|---|
| **Special Issues** | | |
| **Cost as of Jul 23, 2025** | ***Total Cost to Date (direct + indirect):*** | 11,358.10 |
| | ***Est Cost at Completion (E$AC):*** | 11,358.10 |
| | ***Total Budget:*** | 10,500.00 |
| | ***Variance (Total Budget minus- E$AC):*** | -858.10 |
| | ***Reason for Variance:*** | A slight overrun based on projections and actuals. |
| **Projections as of Jul 23, 2025** | ***Dollars Projected for Month:*** | 1,198.89 |
| | ***Actual Dollars Used:*** | 1,151.78 |
| | ***Variance (Projected minus Actual):*** | 47.11 |
| | ***Reason for Variance:*** | na |

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

**Other Measures**