Survey Research Operations

Monthly Project Report

Sponsored Data Collection Projects and Development Initiative

October 2025

Sponsored Data Collection Projects and Development Initiative Projects

(ANES 2024) American National Election Studies - 2024
(BFY) Baby's First Years
(CAMS 2025) HRS 2025 Consumption and Activity Mail Study
(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 2024) Health and Retirement Study 2024
(HRS 2026) Health and Retirement Study 2026
(HRS MGX) Health and Retirement Study (HRS) Mid-Generation X (MGenX) pre-ID
(LHMS 2023 Fall) Life History Mail Study Fall 2023
(LHMS 2023 Spring) Life History Mail Study Spring 2023
(LHMS 2025 Fall) Life History Mail Study Fall 2025
(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 TAS 2025) Transition to Adulthood within its Life Course & Intergenerational Family Context
(PSID25) Panel Study of Income Dynamics Core 2025
(SAFEGUARD) SAFEGUARD
(SCA Web 2025) SCA Web 2025
(SRS 2021) Social Relations 2023
(STARRS-LS 2020-2025) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study
(STARRS-LS 2025-2030) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study
(WaISS) U-M Wallenberg Institute Student Survey
(TSME26 APP SECURITY (425196)) TSME26 APP SECURITY (425196)
(TSME26 AUTO SCHEDULER (483257)) TSME26 AUTO SCHEDULER (483257)
(TSME26 BLAISE FEATURE TESTING (425200)) TSME26 BLAISE FEATURE TESTING (425200)
(TSME26 BLAISE PERFORMANCE (423562)) TSME26 BLAISE PERFORMANCE (423562)
(TSME26 DCO SYSTEMS SUPPORT (483248)) TSME26 DCO SYSTEMS SUPPORT (483248)
(TSME26 GEOLOCATION (425201)) TSME26 GEOLOCATION (425201)
(TSME26 LLM RESUME REVIEW (483424)) TSME26 LLM RESUME REVIEW (483424)
(TSME26 LOGGING (483227)) TSME26 LOGGING (483227)
(TSME26 MSMS PERFORMANCE (425267)) TSME26 MSMS PERFORMANCE (425267)
(TSME26 PASSWORD RESET (425197)) TSME26 PASSWORD RESET (425197)
(TSME26 QC SYSTEMS (483249)) TSME26 QC SYSTEMS (483249)
(TSME26 RCLS (425198)) TSME26 RCLS (425198)
(TSME26 REPLACE RPAY (423463)) TSME26 REPLACE RPAY (423463)
(TSME26 SURVEYTRAK MAINTENANCE (483257)) TSME26 SURVEYTRAK MAINTENANCE (483257)
(TSME26 TEAM LOCATION (424466)) TSME26 TEAM LOCATION (424466)

Sponsored Projects Dashboard

NonArchived Sponsored Projects

Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
ANES 2024	Sponsored	Closing	Andrew L Hupp	🟡	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
BFY	Sponsored	Implementing	Piotr Dworak	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟡	🟡	🟡
CAMS 2025	Sponsored	Implementing	Gloria J Baker	☐	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢
CCS	Sponsored	Implementing	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	Closing	Erin McSpadden	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟡	🟢	🟢
HRS 2024	Sponsored	Closing	Evanthia Leissou	🟡	🟡	🟡	🟡	🟢	🟢	🟢	🟢	🟢	🟢
HRS 2026	Sponsored	Planning	Evanthia Leissou	☐	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢
HRS MGX	Sponsored	Implementing	Andrew L Hupp	☐	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢
LHMS 2023 Fall	Sponsored	Implementing	Gary Hein	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
LHMS 2023 Spring	Sponsored	Implementing	Gary Hein	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
LHMS 2025 Fall	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 TAS 2025	Sponsored	Implementing	Elizabeth Ohryn	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢
PSID25	Sponsored	Implementing	Rachel Anne Orlowski	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
SAFEGUARD	Sponsored	Planning	Daniel Tomlin	☐	☐	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
SCA Web 2025	Sponsored	Implementing	William Keating	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
SRS 2021	Sponsored	Closing	Barbara Lohr Ward	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
STARRS-LS 2020-2025	Sponsored	Closing	Meredith A House	🟢	🟢	🟢	🟡	🟢	🟢	🟢	🟢	🟢	🟢
STARRS-LS 2025-2030	Sponsored	Implementing	Meredith A House	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢
WaISS	Sponsored	Implementing	Jeffrey Albrecht Jr	☐	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢

Project Name	(ANES 2024) American National Election Studies - 2024 (On Track)		
Project Mode	Primary: Web Secondary: Face to Face Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 4,892,421.00	**Indirect Budget:** 2,633,819.00	**Total Budget:** 7,526,240.00
Principal Investigator/Clients	Nicholas A. Valentino (University of Michigan)		
	Shanto Iyengar (Stanford University)		
	D. Sunshine Hillygus (Duke University)		
Funding Agency	National Science Foundation (NSF)		
IRB	*HUM#:* HUM00226016		*Period of Approval:* Study is exempt
Project Team	*Project Lead:* Andrew L Hupp		
	Budget Analyst: William Lokers		
	Production Manager: Theresa Camelo		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1: Margaret Lavanger		
	Production Manager 2: Lisa Van Havermaet		
Proposal #	no data		
Description	The mission of the American National Election Studies (ANES) is to inform explanations of election outcomes by providing data that support rich hypothesis testing, maximize methodological excellence, measure many variables, and promote comparisons across people, contexts, and time. The ANES serves this mission by providing researchers with a view of the political world through the eyes of ordinary citizens. SRO will be conducting the 2024 data collection.		
SRO Project Period	07/2023 - 01/2025		
Data Col Period			
Security Plan	NA		

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

Other Project Team Members	Erin McSpadden - Project Manager for the methods pilot Sharon Parker - Production Manager for the methods pilot Raphael Nishimura - Sampling (pilot and production) Paul Burton - Sampling and Reporting Makenna Harrison - Sampling and Reporting Grace DesJardins - Project Support Marsha Skoman - SurveyTrak programming + Tech Lead Karl Dinkelmann - Blaise oversight + Tech Lead James Rodgers - MSMS + Tech Lead Ashwin Dey - WebTrak Pam Swanson - MSMS set-up programming Sarah Broumand - PQT and QC set-up Peter Sparks - Blaise programming Max Malhotra - Blaise programming Youhong Liu - Blaise programming Shanie Empie - Login portal Hueichun Peng - Self-scheduler Tony Romanowski - Technical specifications and testing Andrew Piskorowski - ODS Kelly Chatain - MSMS specs and testing Elizabeth Ohryn - Testing, SSL support William Keating - Video interviewing coordination in SSL and field support
Other Project Name	
Sample Mgmt System	SurveyTrak; MSMS
Data Col Tool	Blaise 5; Other (PAPI)
Hardware	Laptop; [UM cell] Phone; Paper and Pencil; Other (Additional monitor for video interviews)
DE Software	External vendor (MSG)
QC Recording Tool	Camtasia

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

Report Period	Oct, 2025 (ANES 2024)	Closing
Risk Level	On Track	

Monthly Updates	The 2024 data collection has ended.
	In-person:
	-PRE: 1,042 interviews (966 in-person, 68 phone, 8 mixed + 0 partials)
	-POST: 90% reinterview goal (n=938)
	-Actual: 925 (89%); 372 In-person, 220 Telephone, 332 Video + 1 partial
	Web - Fresh
	-PRE: 2,063 interviews (2,022 + 41 partials)
	-POST: 85% reinterview goal (n=1,754)
	-Actual: 1,769 (86%) (1,721 + 48 partials)
	Web - Panel
	-PRE: 2,171 interviews (2,158 + 13 partials)
	-POST: 90% reinterview goal (n=1,954)
	-Actual: 2,070 (95%) (2,040 + 30 partials)
	Web - GSS
	-PRE: 987 interviews (978 + 9 partials)
	-POST: 85% reinterview goal (n=839)
	-Actual: 807 (82%) (807 + 26 partials)
	Paper
	-PRE: 245
	-POST: 85% reinterview goal (n=208)
	-Actual: 202 (82%)
	SRO finished up the most important problem (MIP) questions coding.
	ANES reviewed their deliverables and requested the login data. We have delivered the login data. We also delivered the insufficient partial data for pre-election cases.
	The remaining work on the study consists of:
	--GSS weighting/final weights
	--Vote validation work
	--Technical (methodology) report.
	We've set-up a new shortcode (and projections) associated with the new NSF grant awarded to CPS for the weighting, vote validation, and manuscript preparation of findings from the study.

Special Issues

Cost as of Nov 11, 2025	*Total Cost to Date (direct + indirect):*	7,532,867.68
	Est Cost at Completion (E$AC):	7,516,093.53
	Total Budget:	7,526,240.00
	Variance (Total Budget minus- E$AC):	10,146.47
	Reason for Variance:	The reason the estimated cost is currently less than the costs to date is we are expecting a credit for uncashed checks over the coming months.

Projections as of Nov 11, 2025	*Dollars Projected for Month:*	30,314.56
	Actual Dollars Used:	31,047.04
	Variance (Projected minus Actual):	-732.48
	Reason for Variance:	

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

Project Name	**(BFY) Baby's First Years (Some Concerns)**
Project Mode	Primary: Face to Face Total of Modes: 1
Project Type	Sponsored Projects
Budget	**Direct Budget**: 750,000.00 **Indirect Budget:** 112,500.00 **Total Budget:** 862,500.00
Principal Investigator/Clients	Dr. Greg Duncan (University of California - Irvine)
	Dr. Kimberly Noble (Teachers College Columbia University)
	Dr. Katherine Magnuson (University of Wisconsin)
Funding Agency	National Institute of Child Health and Human Development (NICHD)
IRB	**HUM#:** HUM00137963 **Period of Approval:**
Project Team	**Project Lead:** Piotr Dworak
	Budget Analyst: David Kellermeyer
	Production Manager: Veronica Connors-Burge
	Senior Project Advisor: Stephanie A Chardoul
	Production Manager 1: Margaret Lavanger
	Production Manager 2:
Proposal #	no data
Description	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.

Description (continued):

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

SRO Project Period	10/2017 - 12/2020
Data Col Period	04/2018 - 12/2020
Security Plan	NA

Milestones		
	Pre Production Start: 10/01/2017	**Pretest Start:**
	Pretest End:	**Recruitment Start:** 01/01/2018
	Staffing Complete: 02/07/2018	**GIT Start:** 03/19/2018
	SS Train Start: 03/20/2018	**SS Train End:** 03/22/2018
	DC Start: 05/07/2018	**DC End:** 06/30/2022

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

Other Project Name	HHICD Household Income and Childhood Development
Sample Mgmt System	MSMS
Data Col Tool	Blaise 5
Hardware	Laptop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	Other (to be specified)
Incentive	Yes, R
Administration	SRO Group
Payment Type	Cash, prepaid (50)
Payment Method	Check through other system (MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (MSMS)

Report Period	Oct, 2025 (BFY)	Implementing
Risk Level	Some Concerns	
Monthly Updates	BFY Age 5- 8:	

BFY interviewers are currently re-contacting all cases in an off-year Age 7 (Aug 2025 - July 2026) and will assist in lab recruitment during the next wave of Age 8 lab data collection planned between June 2026 - July 2027.

Our main concern at this point is the increasing projected overrun through August 2027 due to increased scope of the Age 6 lab recruitment. To reduce the overrun, we are limiting the number of active cases to reduce iwer workload. We will be focusing on cases which thus far did not have any contact after completing the Age 6 Lab and revisit the budget in November, December, and January to see if the reduction in scope appropriately reduced the overrun.

At the same time, we will present the projected overrun to the PIs to see if any further actions would be needed or any funds can be added to ensure effective follow up and lab recruitment through August 2027.

At this time, we have 263 cases which still have not been contacted (down from 320 about a month ago). Interviewer's work is focusing exclusively on those cases.

Project Staffing:

We brought in 2 bilingual on-staffers who will help contacting respondents across all four sites. The team required augmenting after 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.

7 iwers in total
NE: 1 OS (1 NH resigned)
MN: 0 local (1 resigned)
NY: 1 OS (down from 3 ... 1 paused work on BFY and 1 promoted to PM)
NOLA: 1 (working full time and re-located to Florida)
Locators: 2 (are also placing follow up calls as they can to aid the work)
New OS: 2 new bilingual OS added in July/August 2025 ... they will be working sample across all sites;
TLs: 1

Technical system:
BFY experienced MSMS issues in October requiring iwers to stop work for a few days.

Special Issues	Budget: We are making adjustments to projections to make sure we have enough to cover Lab recruitment for Age 8 scheduled for July 2026 - August 2027.	
Cost as of Nov 19, 2025	*Total Cost to Date (direct + indirect):*	368,617.69
	Est Cost at Completion (E$AC):	939,571.79

	Total Budget:		862,500.00
	Variance (Total Budget minus- E$AC):		-77,071.79
	Reason for Variance:	This variance represents a budgeting scenario which might be needed to complete the work through August 2027. We are revisiting the projections internally and with PIs.	
Projections as of Nov 19, 2025	*Dollars Projected for Month:*		46,357.91
	Actual Dollars Used:		52,499.52
	Variance (Projected minus Actual):		-6,141.61
	Reason for Variance:	Some charges need to be removed - iwers form other projects charged sick time to BFY. However, given the continued monthly overrun, the team is implementing changes to how many cases are active and prioritized to reduce iwer workload and conserve as much funding as possible for the Age 8 lab recruitment between June 2026 - July 2027	

Measures

		Units at Complete	RR	HPI
	Current Goal:	n/a	n/a	n/a
	Goal at Completion:	n/a	n/a	n/a
	Current Actual:	n/a	n/a	n/a
	Estimate at Complete:	n/a	n/a	n/a
	Variance:			

Other Measures

Project Name	**(CAMS 2025) HRS 2025 Consumption and Activity Mail Study (On Track)**
Project Mode	Primary: Mail Total of Modes: 1
Project Type	Sponsored Projects
Budget	**Direct Budget**: 392,710.00 **Indirect Budget:** 141,375.00 **Total Budget:** 534,085.00
Principal Investigator/Clients	David Weir (ISR-SRC)
Funding Agency	
IRB	**HUM#:** HUM00246462 ***Period of Approval:*** 9/3/2025
Project Team	***Project Lead:*** Gloria J Baker
	Budget Analyst: Cindy Tsao
	Production Manager:
	Senior Project Advisor: Evanthia Leissou
	Production Manager 1:
	Production Manager 2:
Proposal #	no data
Description	CAMS is part of the Health and Retirement Study (HRS). The goal of CAMS is to gather additional data on household consumption and activities of daily living from participants in the HRS. In fall 2025, a paper questionnaire will be mailed to approximately 7,480 respondents of which 5,326 will receive the full questionnaire and 2,154 will receive a brief questionnaire.
SRO Project Period	07/2025 - 05/2026
Data Col Period	10/2025 - 04/2026
Security Plan	NA

Milestones		
Pre Production Start: 07/01/2025		***Pretest Start:***
Pretest End:		***Recruitment Start:***
Staffing Complete:		***GIT Start:***
SS Train Start:		***SS Train End:***
DC Start: 10/16/2025		***DC End:***

Other Project Team Members	HRS Tech Lead: Jennifer Arrieta HRS Budget Analyst: Cindy Huang Data Manager: Ed Green, Laura Yoder Programmer: Ashwin Dey Project Assistants: Kristen LoDuca, AB Fuqua-Smith
Other Project Name	CAMS
Sample Mgmt System	SurveyTrak
Data Col Tool	SAQ
Hardware	Paper and Pencil
DE Software	External vendor (DataForce)
QC Recording Tool	N/A
Incentive	Yes, R; Yes, Other (Spouse)
Administration	SRO Group
Payment Type	Check, prepaid ($25 to main R and $10 to spouse R)
Payment Method	Check through STrak RPay System

Report Period	Oct, 2025 (CAMS 2025)	Implementing
Risk Level	On Track	
Monthly Updates	In the month of October: 1. Production started October 16 with mailing to 7,480 respondents. 2. Logged received SAQs and undeliverable packets. 3. Provided logging training for one staff member (remaining two to be trained in November). 4. Reminder postcard scheduled for mailing on November 13. Data in Measures Table Below are as of week beginning 11/9/2025 (week 4):	

Special Issues

Cost as of Nov 19, 2025	*Total Cost to Date (direct + indirect):*	366,691.48
	Est Cost at Completion (E$AC):	495,997.50
	Total Budget:	534,085.00
	Variance (Total Budget minus- E$AC):	38,087.50
	Reason for Variance:	Variance is based on revised DataForce projections following the decision to send the final mailing via first class instead of priority mail.
Projections as of Nov 19, 2025	*Dollars Projected for Month:*	19,149.60
	Actual Dollars Used:	19,083.10
	Variance (Projected minus Actual):	66.50
	Reason for Variance:	Minimal Variance.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:		2023 Wk 4 RR=35%	
	Goal at Completion:			
	Current Actual:	2,449	33%	N/A
	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:* 08/01/2025	*Pretest Start:*
	Pretest End:	*Recruitment Start:*
	Staffing Complete:	*GIT Start:*
	SS Train Start:	*SS Train End:*
	DC Start: 10/13/2025	*DC End:* 12/07/2025

Other Project Team Members	Marsha Skoman - Qualtrics Programmer Ed Green - Data Manager Hueichun Peng - Web SMS Programmer	
Other Project Name	How Community College Students Choose Programs of Study	
Sample Mgmt System	Web SMS	
Data Col Tool	Other (Qualtrics)	
Hardware	Desktop	
DE Software	NA	
QC Recording Tool	N/A	
Incentive	Yes, R	
Administration	SRO Group	
Payment Type	Cash, prepaid ($5); Cash, post ($40); Other (Visa electronic gift cards, Amazon gift codes)	
Payment Method	Imprest Cash Fund from ISR Business Office; Other (VISA eGift cards from HSIP, Amazon gift codes from Teachers Coll)	

Report Period	Oct, 2025 (CCS)	Implementing
Risk Level	On Track	
Monthly Updates	-Hueichun and Shaowei kicked off production on 10/13/25 with an email and text message. -Steven worked with PrintCopyMail to send invitation cards on 10/14/25. -The RR was 24% by the end of the first week. -After four emails in two weeks, we decided to pause respondent outreach, because responses were trickling in slowly. -Jeffrey worked with the PIs to pivot to add reminder calling, which the SSL was able and excited to accommodate.	

Special Issues	None to report	
Cost as of Nov 11, 2025	*Total Cost to Date (direct + indirect):*	796,384.11
	Est Cost at Completion (E$AC):	805,505.63
	Total Budget:	644,889.00
	Variance (Total Budget minus- E$AC):	1,427.37
	Reason for Variance:	The variance on CCS is -$24,239 before accounting for the cost share, which is $25,667, so the true variance is $1,427.37. All reported costs are direct, as I was informed that we are not charging indirects at this point in the project.
Projections as of Nov 11, 2025	*Dollars Projected for Month:*	23,147.12
	Actual Dollars Used:	21,215.12
	Variance (Projected minus Actual):	1,932.00
	Reason for Variance:	Respondent payments did not hit in October.

Measures		Units at Complete	RR	HPI
	Current Goal:	1715	38%	
	Goal at Completion:	1715	38%	
	Current Actual:	1649	36.5%	
	Estimate at Complete:	1715	38%	
	Variance:	0	0	

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: Joseph Zylka		
	Production Manager:		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	SRO is working cooperatively with the PIs and their research team as well as the Institue for Social and Environmental Research – Nepal – ISERN – to provide consultation, programming and support for data collection over 2 waves of interviewing. SRO will provide support in the following areas: instrument programming and testing, sample management system programming and testing, and data delivery.		
SRO Project Period	07/2024 - 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:*

Other Project Team Members	Technical Lead: Jennie Williams, TSG Programmer Analyst-Blaise: Peter Sparks Programmer Analyst-Surveytrak Int: Marsha Skoman, TSG Programmer Analyst-Weblog: Ashwin Dey, TSG Database Administrator: Lishwu Ke, TSG Data Manager Specialist: Jennie Williams, Valyn Dall, TSG Help Desk: Emmanuel Ellis, TSG
Other Project Name	HCAP Nepal,
Sample Mgmt System	SurveyTrak; Project specific system (Weblog, QC system)
Data Col Tool	Blaise 4.8
Hardware	Laptop
DE Software	Blaise 4.8 BIA
QC Recording Tool	Other (TBD)
Incentive	Not used
Administration	NA
Payment Type	N/A
Payment Method	N/A

Report Period	Oct, 2025 (CVFS-SCAN)	Implementing
Risk Level	On Track	
Monthly Updates	Project Updates:	
	Part 1 and Part 2 of the Respondent questionnaire are currently in production. 3,519 R iws and 3,519 Inf iws have	

been complted. 2,959 Part 2 interviews have been completed. The overall RR is for an overall 96% thus far. WBD is being tracked via Survey123 and WebLog.

SRO is minimally involved in supporting the project at this time. SRO will continue minimal support until we start Wave 2 pre-production.

Dates for Wave 2 have been determined as follows:
- Wave 2 Preproduction - Fall 2026
- Wave 2 Production Start - Jan 2027
- Wave 2 Production End - May 31, 2027

Projections for Wave 2 have been reviewed and will continue to be updated.

If W1 does not finish with enough time to have the length needed between W1 and W2, the PI will request a no-cost extension and delay the start of W2. Part 1 and parts of Part 2 questionnaires will be combined into one. There will be no WBD. There will be an Inf iw. There will be some Blaise work to combine the iws, as well as spec updating and testing.

SRO will check in with ISER-N in about March 2026, again in summer 2026, and will begin preproduction in Fall 2026.

Special Issues	NIH Funding Review	
Cost as of Nov 19, 2025	***Total Cost to Date (direct + indirect):***	411,755.84
	Est Cost at Completion (E$AC):	559,911.60
	Total Budget:	575,439.00
	Variance (Total Budget minus- E$AC):	15,527.40
	Reason for Variance:	Wave 2 dates and scope have been discussed and communicated to SRO. We have updated projections and will continue to do so.
Projections as of Nov 19, 2025	***Dollars Projected for Month:***	1,770.11
	Actual Dollars Used:	1,361.98
	Variance (Projected minus Actual):	408.13
	Reason for Variance:	No comments. The actual and projected dollars are close.

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**: 2,765,404.00	**Indirect Budget:** 1,548,632.00	**Total Budget:** 4,314,036.00
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. 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. 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: 1. What are the conditions and capabilities of unmarried parents, especially fathers? 2. What is the nature of the relationships between unmarried parents? 3. How do children born into these families fare? and 4. How do policies and environmental conditions affect families and children? 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:***

Other Project Team Members	Stephanie Chardoul - UM Principal Investigator Vanessa Clarke Project Assistant Karl Dinkelmann Blaise Systems and Programming Lead Jude Perillo Blaise programmer Jim Rodgers MSMS Lead Pam Swanson MSMS programmer Bill Loker Financial/Business Analyst Ian Ogden Technical Project Manager Jennie Williams Data Manager (75%) Ed Green Data Manager (25%) Wen Chang Statistician (lead DMSS tasks) David Bolt Help Desk
Other Project Name	
Sample Mgmt System	MSMS; Other (RCLS - loading cases in ST)
Data Col Tool	Blaise 5
Hardware	Laptop; [UM cell] Phone
DE Software	NA
QC Recording Tool	NA

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

Report Period	Oct, 2025 (FFCWS)	Initiation
Risk Level	On Track	

Monthly Updates	October 2025 11/21 - we received IRB approval yesterday so work can begin on active locating steps. They accepted our reassurances on data security and avoided a major redesign of the questionnaire (split into three sections) they suggested. Update on Passive Locating Locating work is still confined to online searches – any necessary phone calls/emails to confirm calls are pending IRB approval. In total 798 cases will need some locating effort. This includes the addresses with an 'undeliverable' outcome from both newsletter mailings and the cases where the newsletter was not mailed due to insufficient address details. To date, some locating effort has been made on 780 of the 798 (98%) that require locating, of these, a lead has been found for 749 cases. The locators have completed passive locating steps for all cases (except those where we have very little information), work can begin on , efforts will switch quickly to confirming leads prior to preparations for the precontact mailing. - Technical systems - Blaise questionnaire was tested by the PI group (up to 11/7) - we are working through their comments and decisions being made (involving the Princeton group as needed in decision making). - As of 11/21 testing MSMS (in INT2) has begun but some functionality is still being programmed. We will not meet our Thanksgiving freeze date - latest agreed date is 12/19 and the q'aire being signed off by 12/12. - We will be delivering some test data today (11/21) for Princeton to review - focusing just on data format. They provided a list of issues that encountered last wave, that they wanted to avoid this wave. The issue relate to the format of multi response variables and applying values to 'not answered' and 'does not apply' for web cases.

Special Issues		
Cost as of Nov 19, 2025	**Total Cost to Date (direct + indirect):**	664,981.45
	Est Cost at Completion (E$AC):	4,301,188.22
	Total Budget:	4,314,036.00
	Variance (Total Budget minus- E$AC):	12,847.78
	Reason for Variance:	Currently projecting a small underrun.
Projections as of Nov 19, 2025	**Dollars Projected for Month:**	202,157.99
	Actual Dollars Used:	169,098.72
	Variance (Projected minus Actual):	33,059.27
	Reason for Variance:	Work/schedule has shifted - resulting in more hours being used in October than originally projected.

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 (Some Concerns)**
Project Mode	Primary: Tracking Total of Modes: 1
Project Type	Sponsored Projects
Budget	**Direct Budget**: 74,484.00 **Indirect Budget:** 41,931.00 **Total Budget:** 116,415.00
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	

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

Report Period	Oct, 2025 (HCHD-2025 Locating)	Implementing
Risk Level	Some Concerns	
Monthly Updates	The H&C locating project ended active locator outreach in early October, and began a final locator review of every sample line in order to identify the best address lead for every unconfirmed sample line. We delivered geocoded data from the 329 sample addresses located through September 22. The SRO delivery timeline and budget expenditures were in line with the timeline that the PI insisted upon in early August. The locating hours were fully expended to produce the same effort but following the PI's revised timeline.

In late October the PI contacted SRO expressing displeasure with the location outcome (around ~405/900 sample persons were contacted or updated their information, a response rate of 45%) and demanded that SRO continue work on the project. SRO Admin approved additional locating work totaling up to $4000 in direct costs. The | |

additional work began once approval was received in early November. SRO will send additional emails to respondents with email addresses, and will conduct additional telephone outreach to unconfirmed addresses.

The project team did additional work in November to correct an error in geocodes that was discovered in the Wave 1 and Wave 2 data. This additional work will also be supported by sequestering funds.

Special Issues

Cost as of Nov 19, 2025	*Total Cost to Date (direct + indirect):*		105,353.47
	Est Cost at Completion (E$AC):		120,227.20
	Total Budget:		116,415.00
	Variance (Total Budget minus- E$AC):		-3,812.20
	Reason for Variance:	The variance reflects additional work that was authorized for the project, but that will be supported by overhead. We do not expect an overrun on the sponsored project.	
Projections as of Nov 19, 2025	*Dollars Projected for Month:*		18,963.06
	Actual Dollars Used:		17,620.68
	Variance (Projected minus Actual):		1,342.38
	Reason for Variance:	Work planned in October to close out the project has now been pushed out to December.	

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

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	Oct, 2025 (Health and Well Being in SE MI)	Closing
Risk Level	On Track	
Monthly Updates	The project team continued to work on weights, the sampling report and the final report. The final set of weights ws delivered at the end of October. The SRO team is continuing to work on the Sampling report and the final report. The PI's clarification resulted in more work being projected for the DMSS team, which will take almost all of the remainder of the study funds, and push delivery of weights until late October, and delivery of the final reports to November or December.	

We are monitoring the expenditures carefully.

Special Issues

Cost as of Nov 19, 2025	*Total Cost to Date (direct + indirect):*		3,753,145.65
	Est Cost at Completion (E$AC):		3,757,648.78
	Total Budget:		3,758,127.00
	Variance (Total Budget minus- E$AC):		478.22
	Reason for Variance:	The variance is insignificant.	
Projections as of Nov 19, 2025	*Dollars Projected for Month:*		6,058.58
	Actual Dollars Used:		4,933.54
	Variance (Projected minus Actual):		1,125.04
	Reason for Variance:	Some work on closeout that was planned for October was pushed into November.	

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). 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:*

Other Project Team Members	In addition: Tim Prand, Mouna Mana, AB Fuqua Smith, Jeff Smith, Ashwin Dey, Kelly Lieske, Valyn Dall, Andria Goedert, Megan Hromco
Other Project Name	
Sample Mgmt System	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop; [UM cell] Phone
DE Software	Other (Weblog)
QC Recording Tool	DRI-CARI; Camtasia
Incentive	Yes, R; Yes, INF
Administration	SRO Group
Payment Type	Check, post ($25 Informant, $100 R, $200 R (end game for panel)); Cash, post ($25 Informant, $100 R, $200 R (end game for panel))
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox)

Report Period	Oct, 2025 (Healthy Brain Project)	Closing
Risk Level	On Track	
Monthly Updates	The project team continued to work on weights, the sampling report and the final report. The final set of weights ws delivered at the end of October. The SRO team is continuing to work on the Sampling report and the final report.	

The PI's clarification resulted in more work being projected for the DMSS team, which will take almost all of the remainder of the study funds, and push delivery of weights until late October, and delivery of the final reports to November or December.

We are monitoring the expenditures carefully.

Special Issues		
Cost as of Nov 19, 2025	*Total Cost to Date (direct + indirect):*	1,531,186.25
	Est Cost at Completion (E$AC):	1,534,389.05
	Total Budget:	1,537,306.00
	Variance (Total Budget minus- E$AC):	2,916.95
	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 very small underrun.
Projections as of Nov 19, 2025	*Dollars Projected for Month:*	9,407.83
	Actual Dollars Used:	9,365.11
	Variance (Projected minus Actual):	42.72
	Reason for Variance:	The variance is insignificant.

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**: 122,774.00	**Indirect Budget:** 68,753.00	**Total Budget:** 191,527.00
Principal Investigator/Clients	Kayte Spector-Bagdady (UM Medical School)		
Funding Agency	NIH		
IRB	*HUM#:* HUM00251017		*Period of Approval:* IRB Exempt
Project Team	*Project Lead:* Erin McSpadden		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager: Lisa J Carn		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	The Hospitals Sharing Patient Data project aims to collect data about how hospitals share their patient data with outside commercial entities in order to shed light on current hospital practices to inform improved policy in the future. The study is funded by the National Institutes of Health through an R01 grant. This project is a survey of hospital chief information officers and data administrators from a sample of around 600 hospitals across the the United States. The goal is to collect surveys from 50% of sampled hospitals. The survey is a 15-minute web survey administered via Qualtrics. Targeted representatives at each hospital will be mailed an invitation letter with a QR code to complete a web survey along with a $50 token of appreciation. Targeted individuals who do not complete the survey will receive a reminder letter with a paper copy of the survey with the option to complete it and return the paper survey using a self-addressed stamped envelope. the SSL will be completing reminder calls to any targeted representative who still has not completed the survey after the reminder protocol. Interviewers in the SSL will have the ability to complete CATI interviewers with any targeted contact reached by phone, as well as updating and filling in any missing contact information from the sample. SSL sample will be managed using WebSMS. The web survey will launch in Februrary 2025 with the SSL effort launching in March 2025. Data collection will end during the month of June 2025. This research has been classified as exempt by the UM MED IRB.		
SRO Project Period	12/2024 - 09/2025		
Data Col Period	02/2025 - 06/2025		
Security Plan	NA		

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

Other Project Team Members			
Other Project Name			
Sample Mgmt System	Web SMS		
Data Col Tool	Other (Qualtrics)		
Hardware	Desktop; Paper and Pencil; Other (SSL Phones)		
DE Software	Other (Qualtrics)		
QC Recording Tool	N/A		
Incentive	Yes, INF		
Administration	UM Group (Payments handled by PI's research staff)		
Payment Type	Cash, prepaid ($50)		
Payment Method	Other (Cash payments from HSIP handled by PI's research staff)		

Report Period	Oct, 2025 (Hospitals Sharing Data)	Closing
Risk Level	On Track	
Monthly Updates	Statistical weighting work has been completed and data delivered to the HSPD PI and research staff. The only	

	remaining work is project archiving and closeout work.	
Special Issues	Project ended with a modest project over run just above $3000. This overrun is inline with the cost reported to the PI when SRO was asked to complete additional statistical weighting work.	
Cost as of Nov 19, 2025	*Total Cost to Date (direct + indirect):*	195,399.34
	Est Cost at Completion (E$AC):	195,399.34
	Total Budget:	191,527.00
	Variance (Total Budget minus- E$AC):	-3,872.34
	Reason for Variance:	Project ended with a slight cost overrun, but ended up being much more modest than expected and in line with what was shared with the PI after SRO was asked to complete additional statistical weighting work.
Projections as of Nov 19, 2025	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	0.00
	Variance (Projected minus Actual):	0.00
	Reason for Variance:	No new costs were reported or incurred in October.

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 2024) Health and Retirement Study 2024 (On Track)**		
Project Mode	Primary: Mixed Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 15,741,165.90	**Indirect Budget:** 5,666,821.44	**Total Budget:** 21,407,987.34
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)
	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	Oct, 2025 (HRS 2024)	Closing
Risk Level	On Track	
Monthly Updates	-Coding data was delivered on October 13, 2025; problem cases are under review.	

-The last SSA reminder packets were mailed on October 3, 2025. Final SSA data delivery to HRS is expected end of November.
-The last SAQ reminder packets were mailed on October 10, 2025. Final SAQ data delivery to HRS is anticipated for early January.
-Ongoing activities: logging and scanning of SAQs and SSA consent forms; data deliveries, Rx/Lab linkage verifications; incentive processing; and reminders/mailings for whole blood draws (WBD).
- WBD draws will finish at the end of November, with final result mailings scheduled for December.

Special Issues

Cost as of Nov 19, 2025	*Total Cost to Date (direct + indirect):*		20,672,468.31
	Est Cost at Completion (E$AC):		20,477,459.45
	Total Budget:		21,407,987.34
	Variance (Total Budget minus- E$AC):		930,527.89
	Reason for Variance:	The underrun has increased since last month due to a credit from voids for respondent incentives.	
Projections as of Nov 19, 2025	*Dollars Projected for Month:*		-130,032.21
	Actual Dollars Used:		97,790.91
	Variance (Projected minus Actual):		-227,823.12
	Reason for Variance:	Variance is primarily due to the non-salary category of respondent payments.	

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

Other Measures

Project Name	**(HRS 2026) Health and Retirement Study 2026 (On Track)**
Project Mode	Primary: Mixed Total of Modes: 3
Project Type	Sponsored Projects
Budget	**Direct Budget**: 15,430,967.00 **Indirect Budget:** 5,555,146.00 **Total Budget:** 20,986,113.00
Principal Investigator/Clients	David Weir (ISR-SRC)
	Kenneth Langa (ISR-SRC)
	Jessica Faul (ISR-SRC)
Funding Agency	
IRB	**HUM#:** HUM00246459 **Period of Approval:** 4/22/2024
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	06/2025 - 12/2027
Data Col Period	05/2026 - 07/2027
Security Plan	Yes

Milestones			
Pre Production Start: 06/17/2025		*Pretest Start:* 02/06/2026	
Pretest End: 02/22/2026		*Recruitment Start:* 08/18/2025	
Staffing Complete: 04/08/2026		*GIT Start:* 04/23/2026	
SS Train Start: 04/23/2026		*SS Train End:* 04/30/2026	
DC Start: 05/04/2026		*DC End:* 06/26/2027	

Other Project Team Members	PDMG/DCO: Andria Shimoura Goedert, Alex Warju, Chelsea Graham, Kristen LoDuca, Daniah Buageila, Erin McSpadden, Gary Hein, Jeannie Baker, Janet McBride, Melissa Luker, Paul Burton, Sharon K Parker, Anthony Romanowski, Vanessa Clarke, Edwina Yang,

Training Coordinator: Ashanti Harris

Tech Team: Brianna Sabol, David Bolt, Ashwin Dey, Deborah Wilson, Jim Rodgers, Jeffrey L Smith, Karl A Dinkelmann, Kelly A Chatain, Laura Yoder, Kelly Lieske, Marsha Skoman, Pamela I Swanson, Shane Empie, Stephanie L Windisch, Sarah Broumond |
Other Project Name	HRS 2026 Panel
Sample Mgmt System	SurveyTrak; MSMS
Data Col Tool	Blaise 5; SAQ
Hardware	Laptop; [UM cell] Phone
DE Software	Other (Blaise 5 Coding Application); External vendor (DataForce)
QC Recording Tool	Camtasia
Incentive	Yes, R; Yes, INF
Administration	SRO Group
Payment Type	Check, prepaid ($100 (Interview)); Check, post ($50 (WBD), $20 (SSA)); Cash, post ($20 (SAQ))
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office

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Report Period	Oct, 2025 (HRS 2026)	Planning
Risk Level	On Track	

Monthly Updates	During the month:
	- The budget analyst and project lead continued initial cost projection activities.
	- The project lead and budget analyst presented to the PI team the work scope that can be covered with the budget and an estimate of effort needed to achieve the same RR results as in 2024 Panel.
	- The training team finalized dates and location for the March 2026 Team Leader Training.
	- Recruitment was completed for 120 On-Staff Field Interviewers, 13 Team Leaders, and 3 Production Coordinators
	- The Tech team began integrated testing of the HRS instrument via SurveyTrak. HRS delivered an updated Blaise test data model; Updates continued on MSMS, SurveyTrak, WebTrak, and test sample specifications. In November, the tech team will begin setting up HRS 2026 in the current MSMS version to test the web survey, task rules, and related components.

Special Issues	HRS 2026 is planned to be the first project launched on Nautilus. There are ongoing concerns about ensuring the Data Manager tool is ready for sample loading and about the end of February 2026 estimated availability Nautilus (the new version of MSMS) for testing prior to the start of HRS web panel production in early June 2026, particularly as HRS project team testing resources will be occupied with training and field production launch in April and early May.

Cost as of Nov 19, 2025	***Total Cost to Date (direct + indirect):***	273,194.18
	Est Cost at Completion (E$AC):	20,986,113.00
	Total Budget:	20,986,113.00
	Variance (Total Budget minus- E$AC):	0.00
	Reason for Variance:	Projecting to budget.

Projections as of Nov 19, 2025	***Dollars Projected for Month:***	220,509.80
	Actual Dollars Used:	143,971.52
	Variance (Projected minus Actual):	76,538.28
	Reason for Variance:	The variance occurred because staff hours were still being finalized when the October CRS period closed, along with anticipated respondent material costs that were not incurred in October as planned. Future projections are being updated.

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

Other Measures	Field Production Start: 5/4/2026 (SurveyTrak)
	Web Panel Production Start: 6/1/2026 (Nautilus)

Project Name	**(HRS MGX) Health and Retirement Study (HRS) Mid-Generation X (MGenX) pre-ID (On Track)**		
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 2,053,949.00	**Indirect Budget:** 739,421.00	**Total Budget:** 2,793,370.00
Principal	David R. Weir (UM-SRC-HRS)		
Investigator/Clients	Kenneth M. Langa (UM-SRC-HRS)		
	Jessica Faul (UM-SRC-HRS)		
Funding Agency	National Institute on Aging (NIA)		
IRB	*HUM#:* 00272520		***Period of Approval:*** Study is exempt
Project Team	*Project Lead:* Andrew L Hupp		
	Budget Analyst: David Kellermeyer		
	Production Manager: Alex Warju		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	We will attempt a shorter (30-minute) pre-baseline interview with cases pre-identified during the 2022 screening effort as being age eligible for the Mid-Generation X cohort in 2028. Interviews will be done in a Blaise 5 instrument launched from SurveyTrak. Interviewer effort will be capped at 6 (in-person/phone) attempts. Interviewers will issue $50 cash for in-person interviews and request $50 checks for completed phone interviews. After six attempts a case moves to endgame where the receive one additional attempt, with an increased token of $100. Endgame cases eligible for web will be mailed an invitation letter and paid via either a check or via Tango). Endgame cases not eligible for web will receive an additional interviewer attempt.		
SRO Project Period	05/2025 - 04/2026		
Data Col Period	08/2025 - 01/2026		
Security Plan	NA		

Milestones			
	Pre Production Start: 03/20/2025	*Pretest Start:*	
	Pretest End:	*Recruitment Start:* 05/12/2025	
	Staffing Complete: 07/15/2025	*GIT Start:*	
	SS Train Start: 08/04/2025	*SS Train End:* 08/04/2025	
	DC Start: 08/11/2025	*DC End:* 01/31/2026	

Other Project Team Members	Paul Burton - Sampling and Reporting Ruyi Chen - Reporting Minako Edgar - Mapping Application Kristen LoDuca - Project Support Daniah Buagelia - Project Support Tim Prand - Technical Lead Marsha Skoman - SurveyTrak + WebTrak programming Karl Dinkelmann - Blaise (web), interviewer observations, contact information instrument TBD - MSMS set-up programming Sarah Broumand - PQT and QC set-up Kelly Lieske - Blaise (in-person/phone) Max Malhotra - Scriptwriter Shanie Empie - Login portal Mouna Mana - Testing Nahid Sultana - Testing Andrew Piskorowski - ODS Caroline Ellison - Research Team Leader Senior (PC) Kristie Carlile - Research Team Leader Intermediate (TL) Dan O'Brien - Research Team Leader Intermediate (TL) Ramsey Clifton - Research Team Leader Intermediate (TL) DianaKaren Guzman - Research Team Leader Intermediate (TL)
Other Project Name	
Sample Mgmt System	SurveyTrak; MSMS
Data Col Tool	Blaise 4.8; Blaise 5
Hardware	Laptop; [UM cell] Phone
DE Software	N/A
QC Recording Tool	DRI-CARI

Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post ($50 ($100 for endgame) telephone/web only); Cash, post ($50 ($100 for endgame) in-person only); Other (Tango)
Payment Method	Check through STrak RPay System; Other (Tango)

Report Period	Oct, 2025 (HRS MGX)	Implementing
Risk Level	On Track	
Monthly Updates	Production has been going well. We've been mostly above goals on hours, attempts, and completes each week. We are monitoring when we will expend the original budgeted hours (as we've been above goal the entire time). We are also monitoring when we will reach our interviewing goal. We expect to use the original budgeted interviewer hours the week of 2025-12-14 and meet the interview goal the week of 2026-01-04. In October, we launched the web endgame.	
Special Issues		

Cost as of Nov 19, 2025	Total Cost to Date (direct + indirect):	1,392,872.63
	Est Cost at Completion (E$AC):	2,783,959.01
	Total Budget:	2,793,370.00
	Variance (Total Budget minus- E$AC):	9,410.00
	Reason for Variance:	Projecting a slight underrun. We will continue to monitor and discuss what, if anything, the PIs might was to use those funds for.
Projections as of Nov 19, 2025	Dollars Projected for Month:	666,843.11
	Actual Dollars Used:	732,335.91
	Variance (Projected minus Actual):	-65,492.80
	Reason for Variance:	The monthly overrun was largely due to travel and respondent incentives. The projections have been adjusted accordingly.

Measures		Units at Complete	RR	HPI
	Current Goal:	1,734	30%	12
	Goal at Completion:			
	Current Actual:	1,339	23.7%	10.63
	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.
	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 Cindy Tsao: Budget Analyst Ruth Philippou: Production Manager Vanessa Clarke: Project Assistant Carolyn Viera Martinez: Coding Lead
Other Project Name	LHMS Fall
Sample Mgmt System	SMS
Data Col Tool	SAQ; Other (Blaise SMS)
Hardware	Desktop; [UM cell] Phone; Paper and Pencil
DE Software	Other (Weblog)
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, prepaid ($25)
Payment Method	Check through STrak RPay System

Report Period	Oct, 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 Nov 19, 2025	*Total Cost to Date (direct + indirect):*			263,311.12
	Est Cost at Completion (E$AC):			263,311.12
	Total Budget:			505,359.00
	Variance (Total Budget minus- E$AC):			242,047.88
	Reason for Variance:	Staffing for reminder calling did not meet original projections and lower response rates than anticipated are resulting in lower costs across the project.		
Projections as of Nov 19, 2025	*Dollars Projected for Month:*			0.00
	Actual Dollars Used:			602.92
	Variance (Projected minus Actual):			-602.92
	Reason for Variance:	Four hours accidentally logged to 2023 instead of Fall 2025. In the process of correcting this.		

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. 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 Cindy Tsao: Budget Analyst Vanessa Clarke: Project Assistant Carolyn Viera Martinez: Coding Lead
Other Project Name	LHMS Spring
Sample Mgmt System	SMS
Data Col Tool	SAQ; Other (Blaise SMS)
Hardware	Desktop; [UM cell] Phone; Paper and Pencil
DE Software	Other (Weblog)
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, prepaid ($25)
Payment Method	Check through STrak RPay System

Report Period	Oct, 2025 (LHMS 2023 Spring)	Implementing
Risk Level	On Track	
Monthly Updates	September Activities and Notable Events for Spring and Fall:	

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

Special Issues	Finance wants to bill current/future fall activities to the spring shortcode

Cost as of Nov 19, 2025		
	Total Cost to Date (direct + indirect):	257,461.54
	Est Cost at Completion (E$AC):	262,639.50
	Total Budget:	457,922.00
	Variance (Total Budget minus- E$AC):	195,282.50
	Reason for Variance:	Actual sample of 1,950 is lower than budgeted sample of 2,288, resulting in generally lower costs across all resources. Check voids have also been added to the projections. In addition, the budgeted response rate was 54% but actual response rate is much lower as the respondents are non-responders from past waves of LHMS.

Projections as of Nov 19, 2025		
	Dollars Projected for Month:	4,130.55
	Actual Dollars Used:	8,801.00
	Variance (Projected minus Actual):	-4,670.45
	Reason for Variance:	Necessary coding hours were higher than expected.

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 Fall) Life History Mail Study Fall 2025 (On Track)		
Project Mode	Primary: Mail Secondary: Web Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 766,039.00	**Indirect Budget:** 275,774.00	**Total Budget:** 1,041,813.00
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. In November 2025, a paper questionnaire and a $25 check as a token of appreciation will be mailed to a sample of approximately 6084 HRS Respondents. From this sample, approximately 2677 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 499 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	09/2025 - 08/2026		
Data Col Period	11/2025 - 04/2026		
Security Plan	NA		

Milestones			
Pre Production Start: 09/01/2025		*Pretest Start:*	
Pretest End:		*Recruitment Start:*	
Staffing Complete:		*GIT Start:*	
SS Train Start:		*SS Train End:*	
DC Start: 11/25/2025		*DC End:* 02/17/2026	

Other Project Team Members	Gary Hein: Project Lead Cindy Tsao: Budget Analyst Chelsea Graham: Project Assistant Carolyn Viera Martinez: Coding Lead
Other Project Name	LHMS Fall
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

Report Period	Oct, 2025 (LHMS 2025 Fall)	Implementing
Risk Level	On Track	
Monthly Updates	LHMS 2025 Fall Activities for October:	

1- Technical development (meetings/programming/testing/reporting) for Paper SAQ (Weblog/Webtrak) and Web (Blaise, Portal, WSMS) modes.
2- Weekly LHMS Web development meeting with HRS tech team
3- Monthly LHMS update meeting with HRS leadership
4- Monthly SRO budget meeting
5- Correspondence with Dataforce to discuss mailing/data collection protocols and project related costs
6- IRB amendment approved. Relocated stamps, sent final templates to Dataforce.
7- Mailing materials purchased, initial mailing partially printed and assembled.
8-Checks ordered and delivered to Dataforce

Special Issues				
Cost as of Nov 19, 2025	*Total Cost to Date (direct + indirect):*			316,951.79
	Est Cost at Completion (E$AC):			533,479.44
	Total Budget:			1,041,813.00
	Variance (Total Budget minus- E$AC):			508,333.56
	Reason for Variance:	Budget includes Spring 2025 costs, while actual costs incurred will only be for Fall 2025.		
Projections as of Nov 19, 2025	*Dollars Projected for Month:*			236,575.92
	Actual Dollars Used:			304,249.03
	Variance (Projected minus Actual):			-67,673.11
	Reason for Variance:	~50k dataforce invoice projected for next month hit this month.		

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	44%	2676	N/A
	Goal at Completion:	44%	2676	N/A
	Current Actual:	N/A	N/A	N/A
	Estimate at Complete:	N/A	N/A	N/A
	Variance:	N/A	N/A	N/A
Other Measures				

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 Investigator/Clients	David Weir (SRC)
	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.

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 Cindy Tsao: Budget Analyst Chelsea Graham: Project Assistant 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

Report Period	Oct, 2025 (LHMS 2025 Spring)	Implementing
Risk Level	On Track	

Monthly Updates	LHMS 2025 Spring Activities for October: 1- Technical services (meetings/programming/testing/reporting) for Weblog/Webtrak and for shutting down web survey. 2- Weekly LHMS Web development meeting with HRS tech team 3- Monthly LHMS update meeting with HRS leadership 4- Monthly SRO budget meeting 5- Correspondence with Dataforce to discuss mailing/data collection protocols and project related costs 6- Sent web reminder letters. 7- Created and sent weekly progress reports. 8- Logged incoming SAQs 9- Processed undeliverable mail, replacement check requests and address updates 10- Fielded respondent emails and calls regarding technical issues or general questions about the project. 11- Sent logged SAQs to dataforce for scanning and processing 12- Bi-weekly data deliveries sent to project staff.

Special Issues	Project Launched July 10th, initial mailings dropped in mail on that date.	
Cost as of Nov 19, 2025	*Total Cost to Date (direct + indirect):*	437,845.55
	Est Cost at Completion (E$AC):	504,721.93
	Total Budget:	558,781.00
	Variance (Total Budget minus- E$AC):	54,059.07
	Reason for Variance:	High usage staff (SSS, SSI) have slightly lower rate than budgeted. Response rate is not as high as anticipated, so there are fewer hours for processing completes.
Projections as of Nov 19, 2025	*Dollars Projected for Month:*	36,412.33
	Actual Dollars Used:	19,262.74
	Variance (Projected minus Actual):	17,149.59
	Reason for Variance:	Dataforce invoice estimated at ~17k did not hit this month. Will project for next month.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	1658	44%	N/A
	Goal at Completion:	1658	44%	N/A
	Current Actual:	1032	28%	N/A
	Estimate at Complete:	1080	29%	N/A
	Variance:	521	15%	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. It is based on two interconnected series of surveys using nationally representative samples: (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). (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. 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) Ed Green (+Brad Goodwin) Data Management Ashwin Dey SurveyTrak, WebTrak and MTF specific Apps. Programmer Brendon Carroll Help Desk/Tablet support
Other Project Name	
Sample Mgmt System	SurveyTrak; Web SMS
Data Col Tool	Other (Qualtrics)
Hardware	Laptop; Tablet; [UM cell] Phone
DE Software	Other (Qualtrics)
QC Recording Tool	N/A
Incentive	Yes, Other (Honorarium paid to school by MTF Research staff)
Administration	ISR Group
Payment Type	NA
Payment Method	Check through other system

Report Period	Oct, 2025 (MTF Base Year 2022_27)	Implementing
Risk Level	On Track	
Monthly Updates	October 2025 FTF school recruitment Four interviewers have been working through their assigned schools. These interviewers are responsible for gaining the Principals approval to participate in MTF next year (2026 wave). All interviewers have taken on responsibility for more schools. We are in the pre-production phase for MTF 2026 wave - training dates are set, reviewed debrief notes and the staffing list is final (we will have two new TLs this year and around a third of the interviewers assigned did not work on MTF last wave). Upcoming deadlines/milestones is the TL training on 12/11.	

Special Issues

Cost as of Nov 19, 2025	*Total Cost to Date (direct + indirect):*	4,572,088.35
	Est Cost at Completion (E$AC):	7,077,631.25
	Total Budget:	9,778,060.00
	Variance (Total Budget minus- E$AC):	2,700,428.75
	Reason for Variance:	Projections for Funding period 2022 – 2027 (latest client report has been uploaded to MPR) Current projections result in an under spend for the five year grant period. The projected costs are based on completion of 325 schools in years 2024 – 2027 (we were projecting costs for 400 schools) and all in-person. Illume charges have been removed from projections from 2024 onwards. A portion of the hours for work involved in transitioning MTF surveys to Qualtrics are being charged to the Illume recharge account. Primary reason for the under spend and plans for SRO funding: Projections for the five year period are based on current scope of work and the adapted protocol (introduced in 2021). The budget prepared for the proposal was based on the pre-pandemic design. The adapted protocol brings savings in the following categories: interviewer hours, travel, shipping and staff time (specifically hours required for loading and preparing tablets for shipping). For the past few years the number of schools recruited and passed to SRO has been lower than the number used for this budget (n=390). In response, MTF (SRC) have reduced our funding for the first two years. We have received (from MTF) $1,843,080 (Y1) and $1,143,890 (Y2) a total reduction of $815,581. Going forward, the current plan is to fund Year 3 and 4 based on the budgeted amount - if there is significant underspending MTF will reduce SRO's Year 5 award. SRO Finance group feels that we should continue to report/monitor using the original budgeted amount because this is not an official reduction in budget. We are keeping the client (via Nick Prieur) informed of actual and projected spend through a monthly cost report.

Projections as of Nov 19, 2025	*Dollars Projected for Month:*	66,169.08
	Actual Dollars Used:	74,298.62
	Variance (Projected minus Actual):	-8,129.54
	Reason for Variance:	Variance was a little higher this month - mainly due to the under projection of interviewer hours for FTF recruitment (assigning more schools to interviewers at this point was not planned), fewer Survey Director hours and other team hours were lower - mainly because we are keeping the MTF systems stable.

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.
	
	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).
	
	Consent process
	 - Parents were mailed a letter with a link to a consent document in Qualtrics.
	 - After receiving parental consent, students were contacted so,
	 - Students on individual schedule, programmed in WebSMS
	
	Data Collection
	 - Invitation email
	 - followed by two reminders, 2 weeks apart if needed. Each student was on his/her own schedule based on when parental permission was received.
	
	Plan for Future
	 - Two more years of data collection
	   Year Recruited Follow-Up
	   2023 2024, 2025
	   2024 2025, 2026		

SRO Project Period	07/2023 - 12/2025		
Data Col Period	04/2024 - 08/2025		
Security Plan	NA		

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

Other Project Team Members	Rebecca Gatward (SPA), Donnalee Grey-Farquharson (Lead), Hueichun Peng, Shaowei Sun, Hongyu Johnson, Brad Goodwin, Edward Green
Other Project Name	
Sample Mgmt System	Web SMS
Data Col Tool	Other (Qualtrics)
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, R
Administration	ISR Group (MTF Staff)

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

Report Period	Oct, 2025 (MTF Early Panel Pilot)	Implementing
Risk Level	On Track	
Monthly Updates	We completed the 2026 MTF Early Panel data collection on 10/27/2025. As of 10/31/2025, 29 students have completed the survey, and 53 parental consents have been received.	

Special Issues

Cost as of Oct 31, 2025	*Total Cost to Date (direct + indirect):*	256,592.33
	Est Cost at Completion (E$AC):	465,912.37
	Total Budget:	288,529.00
	Variance (Total Budget minus- E$AC):	-177,383.37
	Reason for Variance:	The project is showing an overrun because we have projected for a third year of data collection (at the request of the PI) while the proposal was for two years. The estimate has been sent to MTF the estimate for the cost of the extra year and we are awaiting approval. If approval is not received we will remove the 01/26 -12/26 projections and end the project 12/25. Without the extra year of projections the Project has a projected underrun of $6,438.93 ending 12/2025

Projections as of Oct 31, 2025	*Dollars Projected for Month:*	17,937.81
	Actual Dollars Used:	20,150.59
	Variance (Projected minus Actual):	-2,212.78
	Reason for Variance:	One staff exceeded their projected hours in October. The adjustment will be made in November.

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

Other Measures

Project Name	(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027 (On Track)		
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 2,496,935.00	**Indirect Budget:** 1,398,282.00	**Total Budget:** 3,895,217.00
Principal	Megan Patrick (UM-SRC)		
Investigator/Clients			
Funding Agency			
IRB	*HUM#:* 00217920		*Period of Approval:*
Project Team	*Project Lead:* Donnalee Ann Grey-Farquharson		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lloyd Fate Hemingway		
	Senior Project Advisor: Rebecca Gatward		
	Production Manager 1:		
	Production Manager 2: Hongyu Johnson		
Proposal #	no data		
Description	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.		
	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.		
	During 2024 data collection wave, we have 10 survey forms that was reduced from 12 from the previous year.		
	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	Oct, 2025 (MTF Panel 2022-27)	Implementing
Risk Level	On Track	

Monthly Updates	The 2025 Wave Panel Data Collection concluded on October 27, 2025. Post-collection activities are currently underway, with efforts focused on data deliveries.
	18,216 participants were invited. As of October 31, 2025 there were 9,414 (RR 51.68) full web completes and 513 (RR 2.82) accepted partial completes (some of these just did not hit the submit button) for a total of 9,927 (RR 54.5) web completes. In addition 1339 (RR 7.35) SAQs were returned completed. Together these resulted in an overall response of 10730 (RR 58.90). This is the best RR to date since MTF transitioned to Web/Paper.

Special Issues

Cost as of Oct 31, 2025	*Total Cost to Date (direct + indirect):*		2,838,842.11
	Est Cost at Completion (E$AC):		3,957,533.73
	Total Budget:		3,895,217.00
	Variance (Total Budget minus- E$AC):		-62,316.73
	Reason for Variance:	We are working to further adjust operations to reduce overruns as we complete the final month of the 2026 wave data collection.	
Projections as of Oct 31, 2025	*Dollars Projected for Month:*		38,315.45
	Actual Dollars Used:		44,864.27
	Variance (Projected minus Actual):		-6,548.82
	Reason for Variance:	In October, the actual indirect costs exceeded the projected amount due to higher vacation hours among staff and additional time spent by some employees on post–data collection activities beyond their projected hours. Also, costs for the MTF Panel Technology project are being charged here and will be reversed once short codes for the new project are available.	

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. 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:*	

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	Oct, 2025 (NDWS)	Implementing
Risk Level	On Track	

Monthly Updates	October/November activities:

* Related to Wave 1: PDMG and TSG continue to maintain and update released Wave 1 datasets (including weights, annotations, codebooks, and other documentation) deposited in the the Linkage / Acumen / NIA enclave for the restricted use files and the ICPSR NACDA Open Aging Repository for the public use files. This work continues to require more iterations than expected and we were authorized to request some additional funds from W1 carry-over to cover the ongoing revisions and maintenance of the published data - additional funds will cover this work in the next fiscal year Sep 2025 - Aug 2026.

*Related to Wave 2 (May - December 2025): Data collection is ending in December. As of now, the scheduled end dates for Wave 2 data collection are the following: W2 Facility recruitment: 11/30/2025, W2 Staff interviews:12/31/2025, W1 Staff Follow Up interviews:12/31/2025 and CC NRFU: Last email 11/24/25, survey offline 12/1/2025.

RTI recruitment continues to be underway for Nursing Home/Assisted Living agencies and Community Clinicians in addition to the longitudinal staff follow up with Wave 1 respondents. DLH recruitment for Home Care agencies is also underway as well as data collection for Direct Home Care Workers Pilot (a new sample type launched in early September).

Other key activities for Wave 2 include SRO assistance on reviewing data collection progress, preparing Wave 2 PI reports, review of paradata, data delivery and publication activities.

Below are the latest recruitment details (as of 11/16/25):

RTI:
Assisted Living: Out of 1000 agencies, 168 completed admin surveys, 101 rosters were delivered, 2510 staff rostered, 1752 were selected and 984 staff surveys completed (56.2% completion rate). Nursing Homes: Out of 1000 agencies, 179 completed admin surveys, 118 rosters were delivered, 7233 staff rostered, 3397 were selected and 1453 staff surveys completed (42.8% completion rate). Community Clinicians: Out of 19,904, 19,618 CCs have been invited with 2442 completions (12.3% completion rate). RTI longitudinal staff follow up (Wave 1 respondents). Assisted Living: Out of 447, 337 surveys have been completed (74.5% completion rate) Nursing Home: Out of 394, 298 surveys have been completed (75.6% completion rate).

DLH:
Home Care: Out of 300 agencies, 38 completed admin surveys, 334 staff rostered, 137 staff sampled and 27 staff surveys completed (19.7% completion rate). For the Direct Care Worker sample, out of 500 workers, 109 completed the survey (21.8% completion rate).

*Related to Wave 3 (September - August 2026): We are currently preparing for W3 (data collection starting in January 2026). Preparations include updating the AL and HC sample frame and defining a new sample of Community Clinicians who focus more on dementia patients, and providing the final report to the Survey Design Core based on 25 cognitive interviews completed which assisted with W3 instrument design Wave 3 survey specifications are currently underway for Assisted Living/Nursing Home/Home Care admin and staff survey instruments as well as Community Clinician survey and PAPI instruments. PDMG has also worked closely with UM SpanTran to get all new questions/instructions translated into Spanish and have worked with the data collection partners in the preparation, development and review of survey instruments, respondent materials and data collection protocols for the NDWS IRB Sub#8 Submission (11/10/25).

Special Issues	Special Issues: Until this week, NIA was unable to approve Year 1 carryover due to government shutdown. PIs had their first post-shutdown meeting with NIA on 11-18 and they are proceeding with the carryover request. SRC requested approximately $195K in carryover funds to be added to Year 3 (Sep - Aug 2026).

Cost as of Nov 19, 2025	*Total Cost to Date (direct + indirect):*	1,982,137.55
	Est Cost at Completion (E$AC):	6,716,019.19
	Total Budget:	6,750,973.00
	Variance (Total Budget minus- E$AC):	34,953.81
	Reason for Variance:	
Projections as of Nov 19, 2025	*Dollars Projected for Month:*	159,182.63
	Actual Dollars Used:	137,356.75
	Variance (Projected minus Actual):	21,825.88
	Reason for Variance:	Our involvement in the work varies and are currently less involved than projected.

Measures

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

Other Measures

	Units at Complete	RR	HPI
Current Goal:			
Goal at Completion:			

Estimate at Complete:			

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: Cindy Tsao		
	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

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		

Report Period	Oct, 2025 (NYCHVS)	Planning
Risk Level	On Track	
Monthly Updates	Sampling: We are currently working through the QC process for the sampled units in which the PAD file (NYCHVS Admin file) does not match the MSG file. 3 TLs will work on this with a PDMG Sr project manager coordinating and overseeing the QC. We will start with an Accurint search, then an internet search. There are 1,001 sample addresses to start. Training will begin soon. Sample is being selected from addresses that had no matching issues so that we can start to QC the addresses for mailing. Once sample is selected, the data managers will review the file, add SIDs and provide it to the SSA.	

Recruitment & Hiring:
SRO posted again through Indeed and is over-hiring due to the slow pace of CUNY candidates coming in. As of Monday, 11/18, we hired 108 from SRO and only 53 from CUNY. We may hire on-staffers for travel but are still working through those details. We are determining if we will hire a travel team to come to the training in Jan. We may keep this idea on hold and train if needed. We continue to work with RSS for bilingual certifications, which seems to be going more smoothly now.

Training:
Iwer training will be held in Jan, 2026 in NYC. There will be two trainings, back-to-back, 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. Training content and presentations are being finalized. The Home Study sessions have been scheduled so that Iwers can choose their sessions when they sign their paperwork.   The Canvas site for Home Study is under development. We have found a way to upload Captivate self-study modules developed by HPD.

Laptops will be distributed to Iwers at registration so that they can use them for Home Study/GIT/Study Specific Core Sessions. Iwers will be able to select clothing at Registration. Clothing and laptop bags are being ordered by HPD and include the HPD, NYC, and U-M logo.

Training materials are and sessions are being finalized. HPD is reviewing SRO presentations, and vice versa. Voiceovers will begin the week of 11/24.

Blaise:
SRO and HPD are testing the Blaise instrument. The specs are frozen and we are answering final Q&A. HPD has provided the final Xliff file with all translations. SRO is testing Blaise, and HPD has access to CTT for testing. The team is currently not concerned about completing testing in time for training.

MSMS/Nautilus:
MSMS development is going very slowly. We are now testing an Int project, but it is 7 weeks past the date we were supposed to test. It appears that Nautilus will not be ready for training, but will be ready for production. We will use the Int project that is ready for TL Training in mid-December, and make updates to this for training in January. Since the Iwers pick up their laptops at Registration on Jan 8, they will need to do a S/R prior to training to pick up latest updates. Nautilus will be ready for Production.

Other Technical Updates:
The Utility data plan is on pause as the tech team is overloaded with finalizing Blaise and systems for training and production. It is still on the radar and there are placeholders in Blaise.

QC: We are finalizing plans for English and non-English language Verification and Evaluation. Verification: Verification will not be done with vacant units since they will be verified 100% for vacancy status. For occupied units, we will attempt to verify all languages via a web survey sent via text. We will likely select another case for non-responders. Evaluation: English and SPN evaluations will be completed as usual. For the other 5 languages, we are considering an LLM to check for verbatim. If any cases are flagged for not being read verbatim, we will reach out to graduate students or other Language Line at U-M.

Other:
We have still not received IRB approval but believe this will happen soon. Once we are approved, we will submit a CoC application to NIH.

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 Nov 19, 2025	*Total Cost to Date (direct + indirect):*	1,346,661.13
	Est Cost at Completion (E$AC):	13,276,114.39
	Total Budget:	13,499,615.00
	Variance (Total Budget minus- E$AC):	223,500.61
	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 Nov 19, 2025	*Dollars Projected for Month:*	645,118.72
	Actual Dollars Used:	769,660.89
	Variance (Projected minus Actual):	-124,542.17
	Reason for Variance:	Non-salary costs did not hit. Moved projections 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

	Units at Complete	RR	HPI
Current Goal:			
Goal at Completion:			

Estimate at Complete:	71%
Variance:	

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**: 1,938,020.00	**Indirect Budget:** 1,085,288.00	**Total Budget:** 3,023,308.00
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
	Pretest End: 03/11/2024		*Recruitment Start:*
	Staffing Complete:		*GIT Start:* 01/30/2024
	SS Train Start: 01/31/2024		*SS Train End:* 02/02/2024
	DC Start:		*DC End:*

Other Project Team Members	Shonda Kruger-Ndiaye & Camila Kendall -- Co-Project Leads Raphael Nishimura -- Sampling Tech Team: Marsha Skoman (Tech Lead & STrak Programmer), Jude Purillo (Lead Blaise Programmer), Kelly Lieske (Programming Support), Valyn Dall (Data Manager), Jennie Williams (Data Management Support), Emmanuel Ellis (Help Desk), Cheng Zhou (Database setup), Lihshwu Ke (Database set up) Spanish Testing and Project Support: Liliana Grueber
Other Project Name	
Sample Mgmt System	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop
DE Software	N/A
QC Recording Tool	Camtasia
Incentive	Yes, R; Yes, INF
Administration	Other (ETI (Puerto Rican Survey Firm))
Payment Type	Check, post (Varies by study phase); Cash, post (Varies by study phase)
Payment Method	Other (Via ETI Systems)

Report Period	Oct, 2025 (PR-PSID)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Retrained 13 ETI staff remotely 9/30-10/3 (includes 3 production managers that will spend minimal time in the field). 11 interviewers were fully certified.	

The project initially launched on 10/14. However, while trying to update the sample assignments, ETI transferred all of the sample back to Center. The sample could no longer be reassigned in FUM. ETI provided a new sample assignment file, and the data manager reassigned and released the sample. Production officially launched the week of 10/20.

Production has been slower than anticipated. We were able to mail less advance letters than expected, so interviewers have had to hand deliver these materials. As of 11/19, 12 interviews have been completed. SRO is waiting for ETI to provide the weekly IWER hour actuals, so that we can calculate an HPI.

SRO is remotely training 10 new interviewers in mid-November on a modified protocol -- these interviewers are not being trained to conduct the Family Listing.

The PI requested that SRO produce a budget for a third in-person training. The training would allow us to shorten the production period by almost 2 months. The PI is seeking additional funding.

Special Issues	Projected overrun.		
Cost as of Nov 11, 2025	*Total Cost to Date (direct + indirect):*		1,230,590.57
	Est Cost at Completion (E$AC):		3,398,049.71
	Total Budget:		3,023,308.00
	Variance (Total Budget minus- E$AC):		-374,741.71
	Reason for Variance:	SRO updated projections to reflect current production calculations that production will extend through November (previously expected production to end in March). Added minimal projections to support data collection March - November. In September, SRO took over the two PSID PGs, totaling $1.7M, which increased the project budget to $3.2M. Budget now includes additional projections for U-M PI, Financial Analyst, and the most recent ETI budget request.	
Projections as of Nov 11, 2025	*Dollars Projected for Month:*		67,410.77
	Actual Dollars Used:		64,835.15
	Variance (Projected minus Actual):		2,575.62
	Reason for Variance:	Project management support actuals were less than projected. Some of these hours were moved forward.	

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

Project Name	**(PSID TAS 2025) Transition to Adulthood within its Life Course & Intergenerational Family Context (On Track)**
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects
Budget	**Direct Budget**: 819,186.00 **Indirect Budget:** 458,744.00 **Total Budget:** 1,277,930.00
Principal	William Axinn (U-M PSC SRC)
Investigator/Clients	Narayan Sastry (U-M PSC SRC)
Funding Agency	
IRB	*HUM#:* 00112629 *Period of Approval:*
Project Team	*Project Lead:* Elizabeth Ohryn
	Budget Analyst: William Lokers
	Production Manager: William Keating
	Senior Project Advisor: Stephanie A Chardoul
	Production Manager 1: Daric Thorne
	Production Manager 2: Lisa J Carn
Proposal #	no data
Description	TAS 2025 is the 11th Wave of TAS study, part of the PSID Suite of projects.
	Approximately 3,000 youth aged 18 - 28 years who are part of families who participate in the ongoing Panel Study of Income Dynamics (PSID) are invited to take part in a 60-minute web survey. In 2025, all respondents go through the same sequential treatment - non-responders to web survey are called as part of the non-response follow up. Respondents will be offered a up to $150 for completing the interview which includes a $80 base payment and possible other interventions. Phone interviews will be completed by Survey Research Center Survey Services Lab (SSL) interviewers.
SRO Project Period	07/2025 - 08/2026
Data Col Period	11/2024 - 05/2026
Security Plan	NA

Milestones			
Pre Production Start: 07/03/2025		*Pretest Start:*	
Pretest End:		*Recruitment Start:* 07/25/2025	
Staffing Complete: 08/13/2025		*GIT Start:*	
SS Train Start: 11/10/2025		*SS Train End:* 11/13/2025	
DC Start: 11/10/2025		*DC End:* 05/29/2025	

Other Project Team Members	PSID Suite SRO Lead - Shonda Kruger-Ndiaye; Data Manager - Brad Goodwin and Ed Green; Blaise Programmer and Portal - Jude Perillo MSMS Programmers - Darnell Christian; Help Desk Support - Kyle Goodman; Testing Coordinator and project support - James Koopman; Project/Production Support - Steven Sonoras, Xiomara Lorenzo-Guerra & Liliana Grueber; Reporting - Wen Chang and Sau Acharya
Other Project Name	
Sample Mgmt System	MSMS
Data Col Tool	Blaise 5
Hardware	Laptop; Desktop; [UM cell] Phone
DE Software	NA
QC Recording Tool	Camtasia
Incentive	Yes, R; Yes, INF
Administration	SRO Group
Payment Type	Check, post ($80); Other (ePay)
Payment Method	Check through other system (PSID RAPS); Other (ePay)

Report Period	Oct, 2025 (PSID TAS 2025)	Implementing
Risk Level	On Track	
Monthly Updates	October Update Management - The management team is busy preparing for the upcoming data collection launch and training. Major activities include testing and preparing training materials. -The team is preparing to send Print Copy Mail of the merged invite letters to mail the invitations on November 11.	

Sample
-Received 2304 cases that will be included in the first release, which is 84% of the TAS sample. The total sample is expected to be 2730.
-Randomization for protocol treatments (65% Standard and 35% Limited) by 68ID and a Hispanic flag, which provided consideration to any R who self-reported Hispanic or a parent for a new to TAS R.

Staffing:
-Recruitment of 13 total SSL STs took place, which includes 1 TLC, 5 TLs, 2 Locators and 5 interviewers. There has been no attrition among data collectors.

Data Collection:
-Submitted 1981 cell numbers (with consent to text) to the Reassigned Numbers Database (RND), which means that 86% of Rel 1 cases have textable cell phones. Of the cell phone numbers submitted, 1920 (97%) of the numbers were returned with no changes to the cell number. 61 (3%) were returned with an indication that the cell phone number had changed.
-The locating and data collection team is focusing on cases without a cell and email (n=295). The project has received 45 CP replies with updated R contact information via a Qualtrics survey. Locators have begun completing database searches. Obtained 77 cases so far. Will begin calling to confirm leads once production begins.

Technical:
-Freeze for Training and Production is 10/27/2025, which was extended until 10/30/2025. The delays were partly due to the MSMS update, which had no system impact on TAS, but staff time was affected.
-Testing uncovered additional programming and rule revisions regarding the addition of the experimental treatment.
-Outstanding testing: Timed rules testing. This review ensures our communications are timed and appear in the technical system as expected.
-Focusing the team on items needed for launch by prioritizing necessities at the start of production, and items that can hold until closer to NR calling in January.

Other
-The PIs are interested in monitoring data collection progress for any changes to the protocol, especially regarding the limited protocol. They are also interested in expanding efforts as the budget permits.

Special Issues		
Cost as of Nov 19, 2025	*Total Cost to Date (direct + indirect):*	269,916.19
	Est Cost at Completion (E$AC):	1,264,767.40
	Total Budget:	1,277,930.00
	Variance (Total Budget minus- E$AC):	13,162.60
	Reason for Variance:	.
Projections as of Nov 19, 2025	*Dollars Projected for Month:*	126,289.14
	Actual Dollars Used:	106,815.20
	Variance (Projected minus Actual):	19,473.94
	Reason for Variance:	Management costs were lower than anticipated due to extended out of the office time. SSL Survey tech testing hours were also lower than expected.

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

Project Name	**(PSID25) Panel Study of Income Dynamics Core 2025 (On Track)**
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects
Budget	**Direct Budget**: 5,003,388.00 **Indirect Budget:** 2,801,897.00 **Total Budget:** 7,805,285.00
Principal	Tom Crossley (UM-SRC-PSID)
Investigator/Clients	Noura Insolera (UM-SRC-PSID)
	Esther Friedman (UM-SRC-PSID)
Funding Agency	NSF, NIA, NICHD
IRB	*HUM#:* HUM00062417 *Period of Approval:*
Project Team	*Project Lead:* Rachel Anne Orlowski
	Budget Analyst: William Lokers
	Production Manager: Stacy Quisenberry
	Senior Project Advisor: Stephanie A Chardoul
	Production Manager 1: Camila Kendall
	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.
	Talk about ancillary studies here.
	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	Oct, 2025 (PSID25)		Implementing
Risk Level	On Track		
Monthly Updates	Summary of October Activities:		

Summary of October Activities:

Tech:
MSMS - Missing Locator1/Locator2 payment data became a significant technical focus during October. Because the data was wiped in Blaise, restoring it proved to be difficult. Fortunately, MSMS maintained the data in its history. Queries were written looking for examples of L1/L2 payment offering being Yes, before a WebSurvey launch (since WebSurvey was the task clearing that data). The query was finalized, and cases were identified. The same query was applied to 2023 and 2021, finding cases that were missing L1/L2 payment in those waves as well as a result of the same WebSurvey issue. Began working with Data Ops to update SIDs with missing L1/L2 data in 2025 so that the current wave is fully updated and corrected.
- A significant issue occurred in which Emails stopped working correctly. This happened during at a critical juncture of End Game for one of our replicates, after an MSMS Core Update. New memory was installed by CMT, but this did not fully correct the issue. The project was able to adjust course, relying on system sent batch emails being sent to respondents while Interviewer initially worked offline. Eventually they were allowed back online, without emailing - affecting our protocol for nearly a week of End Game. The problem was identified as being sourced to another project affecting the system, and PSID was able to fully return to Interviewer emailing/syncing/online work.

Blaise - An issue linked to Restore from Audit processes was identified. Restoration from Audit does not seem to always correctly run the Blaise rules on Marital status. Evidence RE: the marital status is in the data, but the actual marital status may not be set correctly after the Restore. There have not been many Web restores, and this was identified as an issue we will monitor.

68-ID Site - Towards the end of the month a problem with Contact Attempts not displaying correctly in the 68-ID site was discovered. The cause was identified, but not fully resolved - some longer loading times are expected in the 68-ID contact attempts due to the size of records.

Sample Release / Interventions:
The End game period for English Web Rel 4 began on 9/2 and ended on 10/15. We achieved a 93% RR, before including likely partials (Goal was 93%). Eng Web Rel 5 began the End game period on 9/24, and it will end on 11/5. Eng CATI Rels 1 and 2 Endgame period began on 10/8 and will end on 11/20. All other CATI releases, Spanish Releases, Eng Web Rel 3 (cases related to Spanish releases), and Splitoffs will begin Endgame on 11/16, and it will end on 12/31.

Staffing:
30 follow-up and 3 CATI interviewers, and 1 TL, were consolidated in October. Their last day was 10/24. The interviewers provided feedback via a debriefing form.

Other Activities:
Occupation and Industry coding continued in the SSL.

Special Issues			
Cost as of Nov 18, 2025	**Total Cost to Date (direct + indirect):**		6,183,647.34
	Est Cost at Completion (E$AC):		7,544,445.23
	Total Budget:		7,805,285.00
	Variance (Total Budget minus- E$AC):		260,839.77
	Reason for Variance:	Reduced iwer data collection effort due to less sample than budgeted and anticipating a higher percentage of web completes than budgeted. Removed costs associated with new hires and in-person training. Projecting interviewers and survey specialists/directors at a higher rate than budgeted. Designing data collection and training differently than budgeted. PIs desire to keep the underrun (~$245K direct).	
Projections as of Nov 18, 2025	**Dollars Projected for Month:**		832,570.63
	Actual Dollars Used:		812,835.58
	Variance (Projected minus Actual):		19,735.05
	Reason for Variance:	Nearly all of the variance is due to two months of the CATI recharge not hitting due to the agreement being not yet finalized.	

Measures		Units at Complete	RR	HPI
Current Goal:				
Goal at Completion:		9994	89%	4.73
Current Actual:		8373	81.4%	4.88
Estimate at Complete:		8986	87%	5.23
Variance:		1,008	2%	-0.5

Other Measures	Note: Current actual metrics based on the Dashboard with the week ending on 11/1/25. Goal at Completion is taken

from the budget.
Currently monitoring 2025 production against the 2023 production curves for comparable sample releases.

Project Name	**(SAFEGUARD) SAFEGUARD (On Track)**		
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 2,200,871.00	**Indirect Budget:** 1,232,489.00	**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: 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. 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. 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. 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:***
	Pretest End:	***Recruitment Start:***
	Staffing Complete:	***GIT Start:***
	SS Train Start:	***SS Train End:***
	DC Start: 12/08/2025	***DC End:***

Other Project Team Members	Stephanie Chardoul - UM PI Shonda Kruger - Ndiaye - Senior Project Advisor Meredith House - Survey Director / Advisor Dan Tomlin - Project Lead Anthony Romanowski - Project Manager (Technical Systems Development) William Lokers - Financial Analyst Joseph Zylka - Financial Analyst Peter Sparks - CAI Programmer (Blaise) Hueichun Peng - WSMS Programmer / Tech Lead Sarah Bromand - WSMS Programmer Cheng Zhou - WSMS Programmer Brianna Sabol - Data Manager Laura Yoder - Data Manager / Advisor David Bolt - Help Desk Vanessa Clarke - Project Assistant
Other Project Name	Safeguard - Life Skills Training Safeguard - Life Force Safeguard - Pathfinding
Sample Mgmt System	Web SMS; MSMS
Data Col Tool	Blaise 5
Hardware	Desktop

DE Software	NA
QC Recording Tool	NA
Incentive	Yes, R
Administration	Other (Incentives provided by HJF/USU)
Payment Type	N/A
Payment Method	N/A

Report Period	Oct, 2025 (SAFEGUARD)		Planning
Risk Level	On Track		
Monthly Updates	October work was heavily focused on refinement of Life Force and Life Skills to prepare for production launch of the Baseline surveys. Preparation and early testing of MSMS for follow-up surveys is also underway. Work continues to prepare Pathfinding for Baseline launch and training though we expect this to lag behind LF and LST as we wait for client updates to the survey.		
Special Issues			
Cost as of Oct 31, 2025	*Total Cost to Date (direct + indirect):*		578,791.13
	Est Cost at Completion (E$AC):		3,190,321.72
	Total Budget:		3,433,360.00
	Variance (Total Budget minus- E$AC):		243,038.28
	Reason for Variance:	The projected underrun is due to the removal of the PDMG resource which was originally budgeted before scope changes. Since last spring, many pieces have changed including a reduction in sample size compared to what was original budgeted in the proposal.	
Projections as of Oct 31, 2025	*Dollars Projected for Month:*		177,692.19
	Actual Dollars Used:		102,448.27
	Variance (Projected minus Actual):		75,243.92
	Reason for Variance:	The expectation was to launch Life Force and Life Skills in October but we were delayed due to the government shutdown and the IRB at USU being held up. As a result SSL resources that were projected were not used and needed to be pushed forward. Indirect costs were also lower than expected.	

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: Web Total of Modes: 1		
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#:* Exempt		*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. SCA Web maintains an Exempt IRB status.		
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) Kelly Chatain (Archivist) Andrew Piskorowski (BI Analyst) Cheng Zhou (Database Analyst/Programmer) Jennie Williams (General Programmer/Analyst) Deb Seale (SSL Operations Manager) iAn Woods (Coder) Ann Munster (Coder) Nancy Walker (Coder) Lisa Carn (Coder) Peter Sparks (Programmer) Carolyn Vieira-Martinez (Survey Specialist)
Other Project Name	SCA Web 2025
Sample Mgmt System	Web SMS
Data Col Tool	Blaise 5
Hardware	NA
DE Software	N/A
QC Recording Tool	N/A
Incentive	Not used
Administration	N/A
Payment Type	N/A
Payment Method	N/A

Report Period	Oct, 2025 (SCA Web 2025)	Implementing
Risk Level	On Track	
Monthly Updates	During the October 2025 calendar month, SCA coding processed 1,257 cases with an additional 142 cases for IRR (total of 1,399 cases, 10.2% of cases selected for check coding).	

Overall, coder efficiency in October was 6.2 minutes per case.

Special Issues

Cost as of Nov 19, 2025	*Total Cost to Date (direct + indirect):*		97,705.87
	Est Cost at Completion (E$AC):		117,844.55
	Total Budget:		136,554.00
	Variance (Total Budget minus- E$AC):		18,709.45
	Reason for Variance:	Overall the reasons for the project underrun remains the same; less than projected costs for programming/technical support.	
Projections as of Nov 19, 2025	*Dollars Projected for Month:*		10,069.34
	Actual Dollars Used:		13,974.21
	Variance (Projected minus Actual):		-3,904.87
	Reason for Variance:	October costs exceeded projections for both coding and programming/technical support. Although both areas of the project exceeded costs, programming/technical support were primarily responsible for the overrun in October. The programming/technical support team upgraded blaise, which required additional tasks (testing, data model changes, revising processing scripts, etc.) to ensure production went smoothly.	

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	**(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

Other Project Team Members	Taghreid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall
Other Project Name	Social Relations 2022, DAWN, Social Relations 2023
Sample Mgmt System	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop; [UM cell] Phone; Paper and Pencil
DE Software	Other (Weblog)
QC Recording Tool	DRI-CARI
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post ($25 Informant, $100 R, $200 R (end game for panel)); Cash, post ($75 respondent, $25 informant); Other ($2 screener incentive)
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox)

Report Period	Oct, 2025 (SRS 2021)	Closing
Risk Level	On Track	
Monthly Updates	The project team continued to work on weights, the sampling report and the final report. The final set of weights ws delivered at the end of October. The SRO team is continuing to work on the Sampling report and the final report.	
	The PI's clarification resulted in more work being projected for the DMSS team, which will take almost all of the	

remainder of the study funds, and push delivery of weights until late October, and delivery of the final reports to November or December.

We are monitoring the expenditures carefully.

Special Issues				
Cost as of Nov 19, 2025	*Total Cost to Date (direct + indirect):*			6,139,166.49
	Est Cost at Completion (E$AC):			6,140,940.51
	Total Budget:			6,141,810.11
	Variance (Total Budget minus- E$AC):			869.60
	Reason for Variance:	The variance is insignificant. We do expect the use most of the project budget.		
Projections as of Nov 19, 2025	*Dollars Projected for Month:*			1,382.81
	Actual Dollars Used:			1,142.73
	Variance (Projected minus Actual):			240.08
	Reason for Variance:	The 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 2020-2025) 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.		
	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.		
	To date, we have completed 4 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 Waves 2, 3 and 4.		
	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:*	*Pretest Start:*
	Pretest End:	*Recruitment Start:*
	Staffing Complete:	*GIT Start:*
	SS Train Start:	*SS Train End:*
	DC Start:	*DC End:*

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 STARRS-LS Waves 3, 4, 5 (Yr1)
Sample Mgmt System	MSMS
Data Col Tool	Blaise 5
Hardware	Laptop; Desktop; [UM cell] Phone

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

Report Period	Oct, 2025 (STARRS-LS 2020-2025)		Closing
Risk Level	On Track		
Monthly Updates	See STARRS-LS 2025-2030		
Special Issues	See STARRS-LS 2025-2030		
Cost as of Oct 31, 2025	*Total Cost to Date (direct + indirect):*		13,736,114.60
	Est Cost at Completion (E$AC):		13,736,114.60
	Total Budget:		13,730,116.00
	Variance (Total Budget minus- E$AC):		-5,998.60
	Reason for Variance:	-$5,998.60 remains to be transferred to Year 6 account/ first year of the new 2025-30 award period.	
Projections as of Oct 31, 2025	*Dollars Projected for Month:*		0.00
	Actual Dollars Used:		1,354.47
	Variance (Projected minus Actual):		-1,354.47
	Reason for Variance:	There are a few charges (mostly non-salary) still hitting the 2020-2025 accounts. All remaining charges need to be transferred to the new 2025-30 award period.	

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

Project Name	(STARRS-LS 2025-2030) 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**: 9,496,682.00 **Indirect Budget:** 5,279,479.00 **Total Budget:** 14,776,161.00
Principal	James Wagner (University of Michigan)
Investigator/Clients	David Benedek, James Naifeh (Uniformed Services University)
	Murray Stein / Ron Kessler (University of California San Diego / Harvard)
Funding Agency	Department of Defense
IRB	*HUM#:* HUM00251796	*Period of Approval:* 5/7/25-5/6/26
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.

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.

To date, we have completed 4 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 Waves 2, 3 and 4. We will attempt to reinterview that same sample in Waves 5 and 6, which are covered in this project listing.

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	03/2025 - 02/2030
Data Col Period	11/2024 - 04/2026
Security Plan	NA

Milestones	*Pre Production Start:* 04/01/2024	*Pretest Start:*
	Pretest End:	*Recruitment Start:* 08/19/2024
	Staffing Complete: 10/29/2024	*GIT Start:* 11/12/2024
	SS Train Start: 11/21/2024	*SS Train End:* 11/26/2024
	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 Waves 5, 6
Sample Mgmt System	MSMS
Data Col Tool	Blaise 5
Hardware	Laptop; Desktop
DE Software	N/A
QC Recording Tool	DRI-CARI
Incentive	Yes, R

Administration	SRO Group
Payment Type	Check, post ($50-$100)
Payment Method	Check through other system (MSMS)

Report Period	Oct, 2025 (STARRS-LS 2025-2030)	Implementing
Risk Level	On Track	
Monthly Updates	Project Management and Planning:	

Monthly Updates

Project Management and Planning:
• Meredith sent summary information about the LS Waves (e.g., dates, length of data collection, protocol length, etc.) to Dr. Kessler for a COVID analyses, per his request.
• We continued participation in discussions and information sharing related to an updated biosample inventory received from Sampled at Rutgers.
• Budget/Funding:
o We continued to move hours and costs from March, April and/or May 2025 to the new Year 6 accounts. After all of the costs are moved appropriately, it will bring the Year 5 (and 2020-2025 5-year budget period) to a zero balance and we will be able to close it out.
o Two security and risk-related review holds, that were put in place on September 17, were lifted on October 2 and October 8. After final processing, the Year 6 award was activated on October 16. This award provides funding through December 2025.
o U-M's Year 7 budget package was sent to USUHS on November 4. The Year 7 POP will cover 12 months, January 2026-December 2026.
• IRB:
o Amendments to add Dr. Benedek as USUHS PI and Dr. Naifeh as Co-PI:
? Wave 5 IRB protocol – continued under review at USUHS.
? HADS IRB protocol – continued under review at USUHS.
? LS IRB protocol (W1, W2) – submitted to U-M on October 16 and approved on October 24.
• 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.

Enclave and User Support:
• Annual IA security review: On hold until after the furlough has ended.
• Annual NDI Data Request (2025 request for data through 2023):
o We awaited confidentiality agreements (re-signed with wet ink) from two of the six parties. The OASD-HA form has been held up due to the government closure. UCSD's is going through the process of obtaining official signatures.
o We assisted Dr. Stein with a question from the UCSD contracts office about providing proof of security compliance for holding NDI data. We confirmed the data will not be held at UCSD, rather at U-M, and provided U-M's security description for their information.
o We also awaited USUHS approval of the LSW5 and HADS IRB amendments for the USU PI change.
• Collaboration with ORISE fellow, Dr. Dias, working with Dr. Jarvis of Army G-9/DPRR:
o Processing of the DUA between USUHS and Dr. Dias (Oak Ridge Institute for Science and Education) was completed on October 9.
o It was determined that two routes would be pursued for providing Dr. Dias with access to the data she needs for her work:
? Harvard will prepare a dataset for Dr. Dias that can be transferred to her if it only contains survey data and the approved admin variables.
• Harvard submitted a data transfer memo for moving the data off the enclave. U-M and Harvard teams worked back and forth to clarify aspects of the memo and data file.
? Dr. Dias will be onboarded to the U-M enclave and then she will be able to access Army/DoD administrative variables on the enclave and use these for the outcome.
• The U-M team expedited her onboarding process. By the end of the month, Dr. Dias had completed her enclave security training and the U-M team established her enclave account; however, her government computer was blocking access to all U-M links. Enclave IT assisted with troubleshooting and Dr. Dias contacted Army/Pentagon IT for support.
• Geocoded files (for Wave 3 and 4 respondent addresses, where their addresses had changed from the previous survey administration) were completed and moved to the Enclave. Their availability was announced to Harvard staff on October 24.
• Work to update the Wave 3 and 4 numbers in the blood/survey count tables for USUHS was completed on October 27. Dr. Ursano asked if we could add the count for unique blood samples for participants who have NSS, PPDS T0 only data publicly released. We added this number at the bottom of Table 3.
• 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 Two sets of administrative construct files from Harvard/AAG were processed and placed on the enclave on October 9 and on November 4.
o We assisted a USUHS analyst with a question about use of VPN to access the enclave while working remotely
o We assisted a USUHS analyst with a permissions issue (difficulty saving files) on the enclave
o In addition to Dr. Dias's onboarding, we started the process for one new Harvard analyst and a new U-M IT staff member
o We began offboarding for two U-M IT staff and completed offboarding for a third.
o We coordinated with USUHS regarding an enclave user who changed institutions and will need a new DUA drafted in order to maintain enclave access.
o We coordinated with USUHS on tracking updates to DUA extensions with external collaborators.
• Biomarker group request for assistance:
o Diagnostic and sociodemographic data sharing with DHA (Dr. Evatt):

? We continued to engage in matters related to collaboration and data sharing with Dr. Evatt, including costs/benefits, the scope of the request, and options for accessing the data.
? On October 3, we sent cost estimates to the PIs for two options for fulfilling Dr. Evatt's request – creating a customized deliverable and onboarding Dr. Evatt (or his analyst) to the U-M Data Enclave.

Public Use Data:
• The ICPSR quarterly user report was sent to USUHS for M&RA and the GSC on October 15.
• We assisted Dr. Stein in providing guidance to the research team at University of Alabama, who have requested biosamples from Sampled (Rutgers).
o October 8, we helped the Alabama team with identifying the IDs needed to identify participants and their plasma samples at ICPSR.
o October 22, we assisted the Alabama team with identifying the data file from ICPSR that contains the list of IDs of participants who have biosample flags.
• We awaited information from ICPSR about what gradual phase out of the Virtual Data Enclave (VDE) option would involve. James and Meredith will bring this information to the PIs/RT for discussion/consideration.
• 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 October 30, 2025, are as follows:
o Replicates released: 10 of 14 released with 10,531 sample lines.
o Completed interviews: 7,514 (7,266 web; 248 phone)
o By the end of the month, Replicate 9 was in Phase 4; the response rate was 72.2% and tracking with the average rate.
o Throughout the month, we monitored Replicate 10 closely because we noticed the response rate trend line diverging from the norm more than usual shortly after email reminder 1 (ER1) was sent.
? We observed lower email open rates for the Yahoo domain for ER1. This usually happens when our emails are not getting through – oftentimes going to spam. We looked for negative signals such as the number of bounced emails, active spam reports. Nothing stood out to us as a reason why Yahoo emails might have been sent to spam.
? After ER1, the open rates were back closer to normal and the response rate, despite being slightly below the average, was trending in the right direction.
? As of October 30, Replicate 10 was in Phase 3 and the response rate was 43.5%.
o The response rate for completed replicates (Reps 1-8) is 75.2%.

Safety Plan Results:
• The Wave 5 combined Safety Plan rate was 12.9% as of Oct 30:
o Army Chaplains:
? 2,220 (# started IW), 2,129 (# completed IW), 174 (safety plan checks), 7.8% activation rate
o U-M CCP:
? 5,591 (# started IW), 5,385 (# completed IW), 830 (safety plan checks), 14.9% activation rate

Special Issues	Language in the following area of risk/mitigation strategy 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 subaward is activated. o The Year 6 subaward was activated on October 16, 2025. It provides 10 months of funding covering March – December 2025. We are currently projected to spend ~$2.9M of the ~3.4M Yr6 funding amount by the end of December. That leaves about $500K to spend, which should take us through early February. We hope/expect Year 7 funds will be in place by that time. o We are anticipating a smoother process during the current 5-year award period. As we understand it, USUHS issued the agreement to HJF as a five-year award, so for the next four funding cycles, there will be modifications to the new agreement rather than separate subawards issued each time.	

Cost as of Sep 30, 2025	*Total Cost to Date (direct + indirect):*	1,884,808.64
	Est Cost at Completion (E$AC):	14,765,622.96
	Total Budget:	14,776,161.00
	Variance (Total Budget minus- E$AC):	10,538.04
	Reason for Variance:	All but ~$5K has been transferred from Year 5 of 2020-25 to Year 6 (first year of 2025-30) so this amount was moved forward in the projections. Other updates for the month included minor changes to staff hours and reducing future non-salary projections for purchases that hit in September.
Projections as of Sep 30, 2025	*Dollars Projected for Month:*	359,496.08
	Actual Dollars Used:	369,938.08
	Variance (Projected minus Actual):	-10,442.00
	Reason for Variance:	We spent ~$7,200 on enclave computer software/supplies in Sept. This amount will be removed from future enclave non-sal projections. Respondent payment actuals were about $16K more than projected.

Measures		Units at Complete	RR	HPI
	Current Goal:	10,763	74%	18.0
	Goal at Completion:	10,763	74%	18.0
	Current Actual:	7,514	75.2% (Reps 1-8)	18.7
	Estimate at Complete:	10,763	74%	18.0
	Variance:	0	0	0
Other Measures	Stats as of 10/30/25			

		Units at Complete	RR	HPI
	Current Goal:	10,763	74%	18.0
	Goal at Completion:	10,763	74%	18.0

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 Investigator/Clients	Mark Tessler (University of Michigan)
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: 10/03/2025		**SS Train End:** 10/03/2025	
DC Start: 09/25/2025		**DC End:** 11/25/2025	

Other Project Team Members	
Other Project Name	Wallenberg Institute Student Survey
Sample Mgmt System	Web SMS
Data Col Tool	Qualtrics/Illume
Hardware	NA
DE Software	NA
QC Recording Tool	Live monitoring
Incentive	Yes, R
Administration	NA
Payment Type	Other (Electronic gift card, post)
Payment Method	Other (Tango Card from ISR Business Office)

Report Period	Oct, 2025 (WaISS) Implementing
Risk Level	On Track
Monthly Updates	-Bill kicked off reminder calling on 10/6/25 to experimental production protocol Group 1 and to Group 2 on 10/31/25. -Hueichun and Shaowei sent 5 emails and a text message in October. -Jeffrey presented a second project review on 10/10/25. -Jeffrey met with the PIs weekly and sent weekly production reports. -Jeffrey and Nahid reconciled Tango expenses with the business office. -Jennie updated the data download to compute new variables for data analysis. -Jeffrey, Wen, and Makenna made data analysis plans. -Makenna set up a R Shiny production report. -Grace set up a data quality report. -By the end of October, we achieved a 33.5% RR, which is almost three times the original proposal projection.

Special Issues	None to report at this time.	
Cost as of Nov 12, 2025	*Total Cost to Date (direct + indirect):*	228,196.93
	Est Cost at Completion (E$AC):	299,707.57
	Total Budget:	1,002,656.00
	Variance (Total Budget minus- E$AC):	22,341.43
	Reason for Variance:	Note: the projections and costs reported here are for Year 1 only, hence the mismatch between the estimated cost at completion and underrun against the total budget. We have reduced projections for completed surveys by about 1,000. We reduced the projected respondent payments by ~$18,000 partly due to lower than expected respondent payments costs on account of the study design and to fewer respondents completing than our optimistic projections. The underrun is also partly due to lower than expected hours worked by interviewers and statistician. Also, fringe benefits and vacation accrual costs were lower than projected.
Projections as of Nov 12, 2025	*Dollars Projected for Month:*	86,498.34
	Actual Dollars Used:	77,080.34
	Variance (Projected minus Actual):	9,418.00
	Reason for Variance:	The underrun is due to unspent vacation accrual, fringe benefits, and lower than projected interviewer and statistician effort.

Measures		Units at Complete	RR	HPI
	Current Goal:	40%	4000	
	Goal at Completion:	40%	4000	
	Current Actual:	38.8%	3878	
	Estimate at Complete:	40%	4000	
	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	Jul	Aug	Sep	Oct
TSME26 APP SECURITY (425196)	Initiatives	Implementing	Carol Lively	☐	☐	☐	☐	☐	☐	🟢	🟢	🟡	🟢
TSME26 AUTO SCHEDULER (483257)	Initiatives	Planning	Debbie Seale	☐	☐	☐	☐	☐	☐	🟢	🔴	🟢	🟢
TSME26 BLAISE FEATURE TESTING (425200)	Initiatives	Initiation	Karl A Dinkelmann	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢
TSME26 BLAISE PERFORMANCE (423562)	Initiatives	Initiation	Karl A Dinkelmann	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢
TSME26 DCO SYSTEMS SUPPORT (483248)	Initiatives	Implementing	Vivienne Y Outlaw	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢
TSME26 GEOLOCATION (425201)	Initiatives	Implementing	Sarah Crane	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢
TSME26 LLM RESUME REVIEW (483424)	Initiatives	Implementing	Grant D Benson	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢
TSME26 LOGGING (483227)	Initiatives	Planning	Hueichun Peng	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢
TSME26 MSMS PERFORMANCE (425267)	Initiatives	Implementing	Jim Rodgers	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢
TSME26 PASSWORD RESET (425197)	Initiatives	Initiation	David Bolt	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢
TSME26 QC SYSTEMS (483249)	Initiatives	Implementing	Sarah Elisa Broumand	☐	☐	☐	☐	☐	☐	🟢	🟢	🟡	🟢
TSME26 RCLS (425198)	Initiatives	Implementing	Hueichun Peng	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢
TSME26 REPLACE RPAY (423463)	Initiatives	Planning	Hueichun Peng	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢
TSME26 SURVEYTRAK MAINTENANCE (483257)	Initiatives	Implementing	Jeffrey L Smith	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢
TSME26 TEAM LOCATION (424466)	Initiatives	Planning	Mark Simonson	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢

Project Name	**(TSME26 APP SECURITY (425196)) TSME26 APP SECURITY (425196) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 18,000.00	**Indirect Budget:** 0.00	**Total Budget:** 18,000.00
Principal			
Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Carol Lively		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Carol Lively		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	TSME26 Project		
SRO Project Period	06/2025 - 06/2026		
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

Report Period	Oct, 2025 (TSME26 APP SECURITY (425196))		Implementing
Risk Level	On Track		
Monthly Updates	As New York Housing City Project security work is underway, more of TSG is charging this short code. Sarah Broumand and some of Hueichun's team will be charging over the next several months. Work done this month includes Business Continuity plans and Auth/Session service security work.		
Special Issues			
Cost as of	*Total Cost to Date (direct + indirect):*		0.00
	Est Cost at Completion (E$AC):		0.00
	Total Budget:		18,000.00
	Variance (Total Budget minus- E$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

Current Goal:

Project Name	**(TSME26 AUTO SCHEDULER (483257)) TSME26 AUTO SCHEDULER (483257) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 15,000.00	**Indirect Budget:** 0.00	**Total Budget:** 15,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Debbie Seale		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	SSL Auto Scheduler		
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

Report Period	Oct, 2025 (TSME26 AUTO SCHEDULER	Planning
Risk Level	On Track	
Monthly Updates	We are on track to have the systems built by January 2026 with testing in February 2026 and implementation in March 2026.	
Special Issues		

Cost as of	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	15,000.00
	Variance (Total Budget minus- E$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

		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			

Project Name	**(TSME26 BLAISE FEATURE TESTING (425200)) TSME26 BLAISE FEATURE TESTING (425200) (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: Nicole Danielle Doher
	Production Manager:
	Senior Project Advisor: Carol Lively
	Production Manager 1:
	Production Manager 2:
Proposal #	no data
Description	This TSME FY26 initiative allocates some base funds to review the new and recent features added to the Blaise survey platform. One of the key features we have been anticipating for several versions is the initial release of Video Interviewing, which does not seem to have been included in version 5.16. We expect to learn more in September about whether it will be available in the upcoming version 5.17 later this year. Additionally, we plan to evaluate other forthcoming features, including support for Entra (Azure Active Directory), improvements to the Blaise TestSuite, and enhanced logging. The latter two features are also expected to be included in version 5.17.
SRO Project Period	07/2025 - 06/2026
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	The Blaise team.
Other Project Name	
Sample Mgmt System	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Oct, 2025 (TSME26 BLAISE FEATURE TESTING (425200))	Initiation
Risk Level	On Track	
Monthly Updates	Nothing new last month to report.	
Special Issues		
Cost as of Nov 19, 2025	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	10,000.00
	Variance (Total Budget minus- E$AC):	10,000.00

	Reason for Variance:	na	

Projections as of Nov 19, 2025	*Dollars Projected for Month:*		0.00
	Actual Dollars Used:		0.00
	Variance (Projected minus Actual):		0.00
	Reason for Variance:	na	

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

Other Measures

Project Name	(TSME26 BLAISE PERFORMANCE (423562)) TSME26 BLAISE PERFORMANCE (423562) (On Track)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 5,000.00	**Indirect Budget:** 0.00	**Total Budget:** 5,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Karl A Dinkelmann		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	This TSME FY26 initiative builds on last year's efforts to optimize the number of cores and servers used for our Blaise servers. This year, we will finalize the new gold standard server configuration for future use. Additionally, we plan to allocate some of these funds to streamline load testing for all surveys. It is essential to understand the load that each Blaise 5 web survey imposes on its current server configuration.		
SRO Project Period	07/2025 - 06/2026		
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	The Blaise Admin team.
Other Project Name	
Sample Mgmt System	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Oct, 2025 (TSME26 BLAISE	Initiation
Risk Level	On Track	
Monthly Updates	Nothing new last month to report.	
Special Issues		
Cost as of Nov 19, 2025	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	5,000.00
	Variance (Total Budget minus- E$AC):	5,000.00
	Reason for Variance: na	

Projections as of Nov 19, 2025	**Dollars Projected for Month:**			0.00
	Actual Dollars Used:			0.00
	Variance (Projected minus Actual):			0.00
	Reason for Variance:	na		

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

Other Measures

	Current Goal:			

Project Name	**(TSME26 DCO SYSTEMS SUPPORT (483248)) TSME26 DCO SYSTEMS SUPPORT (483248) (On Track)**
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives
Budget	**Direct Budget**: 42,000.00 **Indirect Budget:** 0.00 **Total Budget:** 42,000.00
Principal Investigator/Clients	
Funding Agency	
IRB	*HUM#:* *Period of Approval:*
Project Team	*Project Lead:* Vivienne Y Outlaw
	Budget Analyst: Nicole Danielle Doher
	Production Manager:
	Senior Project Advisor: Carol Lively
	Production Manager 1:
	Production Manager 2:
Proposal #	no data
Description	DCO Systems Support
SRO Project Period	07/2025 - 06/2026
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

Report Period	Oct, 2025 (TSME26 DCO SYSTEMS SUPPORT (483248))	Implementing
Risk Level	On Track	
Monthly Updates	1. Worked on the FOTY 2026. 2. Fixed various bugs in Fred due to ColdFusion server upgrade 3. Worked on SSL Laptop Removal Form in Fred 4. Corrected PayRate table 5. Added new email template for Staff Assignment emails	
Special Issues		
Cost as of Nov 19, 2025	*Total Cost to Date (direct + indirect):*	13,499.30
	Est Cost at Completion (E$AC):	20,151.72
	Total Budget:	42,000.00
	Variance (Total Budget minus- E$AC):	21,848.28
	Reason for Variance: x	

Projections as of Nov 19, 2025	**Dollars Projected for Month:**			2,622.04
	Actual Dollars Used:			3,688.74
	Variance (Projected minus Actual):			-1,066.70
	Reason for Variance:	x		

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

Other Measures	x

Projections as of Nov 19, 2025	**Dollars Projected for Month:**			2,622.04
	Actual Dollars Used:			3,688.74
	Variance (Projected minus Actual):			-1,066.70

	Current Goal:	

Project Name	**(TSME26 GEOLOCATION (425201)) TSME26 GEOLOCATION (425201) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 15,000.00	**Indirect Budget:** 0.00	**Total Budget:** 15,000.00
Principal			
Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Sarah Crane		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Carol Lively		
	Production Manager 1: Elizabeth Ohryn		
	Production Manager 2:		
Proposal #	no data		
Description	Geolocation for Screener Projects		
SRO Project Period	07/2025 - 06/2026		
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	Programmer: Minako Edgar
Other Project Name	
Sample Mgmt System	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Oct, 2025 (TSME26 GEOLOCATION	Implementing
Risk Level	On Track	
Monthly Updates	Check-in with developer 2/month. NYC-only test version launched, to guide mods in advance of NYCHVS. Proposed abstract for IFDTC 2026. Tool is being used in production while enhancements are being developed.	
Special Issues		

Cost as of Nov 11, 2025	*Total Cost to Date (direct + indirect):*	4,477.40
	Est Cost at Completion (E$AC):	14,139.21
	Total Budget:	15,000.00
	Variance (Total Budget minus- E$AC):	860.79
	Reason for Variance: Slight under-projection of TS support hours after launch with NYCHVS in early 2026.	

Projections as of Nov 11, 2025	***Dollars Projected for Month:***			2,459.49
	Actual Dollars Used:			2,235.97
	Variance (Projected minus Actual):			223.52
	Reason for Variance:		Desktop Support Spec Ld Supr did not require the hour projected for him.	

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

Projections as of Nov 11, 2025	***Dollars Projected for Month:***			2,459.49
	Actual Dollars Used:			2,235.97

Project Name	**(TSME26 LLM RESUME REVIEW (483424)) TSME26 LLM RESUME REVIEW (483424) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 1.00	**Indirect Budget:** 0.00	**Total Budget:** 1.00
Principal Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Grant D Benson		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	The purpose of this project was to examine the feasibility of using AI to scan applicant resumes and score them according to pre-specified criteria. We ran two models: AI (Mistral 7b) with examples and machine learning using past scoring efforts. If we can generate a successful model, we hope to create a small, single purpose app process resumes and summarize results for job postings with large applicant pools.		
SRO Project Period	07/2025 - 06/2026		
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	Desktop	
DE Software	Other (LLM/Ollama)	
QC Recording Tool	NA	
Incentive	NA	
Administration	NA	
Payment Type	NA	
Payment Method	NA	

Report Period	Oct, 2025 (TSME26 LLM RESUME ~~REVIEW (483424))~~	Implementing
Risk Level	On Track	
Monthly Updates	Overall, the initial efforts were disappointing. However, we were able to leverage AI's summary feature to provide a description of how each resume might have met a specific scoring criteria.	
	We are waiting on getting a dedicated machine to see if we can fine tune an LLM and do a better job of scoring applicant resumes based on department specific criteria.	
Special Issues		
Cost as of	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	1.00

	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	**(TSME26 LOGGING (483227)) TSME26 LOGGING (483227) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 30,000.00	**Indirect Budget:** 0.00	**Total Budget:** 30,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Hueichun Peng		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Carol Lively		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	Mail/PAPI/Bio Logging		
SRO Project Period	07/2025 - 06/2026		
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		

Report Period	Oct, 2025 (TSME26 LOGGING (483227))	Planning
Risk Level	On Track	
Monthly Updates	On hold to wait for Nautilus new API library	
Special Issues		

Cost as of Nov 19, 2025	*Total Cost to Date (direct + indirect):*		2,652.35
	Est Cost at Completion (E$AC):		2,652.35
	Total Budget:		30,000.00
	Variance (Total Budget minus- E$AC):		27,347.65
	Reason for Variance:	x	
Projections as of Nov 19, 2025	*Dollars Projected for Month:*		5,283.73
	Actual Dollars Used:		599.74

		Variance (Projected minus Actual):		4,683.99
	Reason for Variance:	x		

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

Other Measures

		Variance (Projected minus Actual):		4,683.99
	Reason for Variance:	x		

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:			
	Goal at Completion:			

Project Name	**(TSME26 MSMS PERFORMANCE (425267)) TSME26 MSMS 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: Carol Lively		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	TSME26 project		
SRO Project Period	07/2025 - 06/2026		
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		

Report Period	Oct, 2025 (TSME26 MSMS PERFORMANCE (425267))	Implementing
Risk Level	On Track	
Monthly Updates	Ongoing	
Special Issues		
Cost as of Nov 19, 2025	*Total Cost to Date (direct + indirect):*	37,062.94
	Est Cost at Completion (E$AC):	112,903.80
	Total Budget:	100,000.00
	Variance (Total Budget minus- E$AC):	-12,903.80
	Reason for Variance: Variance	
Projections as of Nov 19, 2025	*Dollars Projected for Month:*	10,701.47
	Actual Dollars Used:	9,600.24

	Variance (Projected minus Actual):			1,101.23
	Reason for Variance:	Variance		

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

Other Measures

		Units at Complete	**RR**	**HPI**
	Current Goal:			
	Goal at Completion:			

Project Name	**(TSME26 PASSWORD RESET (425197)) TSME26 PASSWORD RESET (425197) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 5,000.00	**Indirect Budget:** 0.00	**Total Budget:** 5,000.00
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	TSME26 Project		
SRO Project Period	07/2025 - 06/2026		
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	

Report Period	Oct, 2025 (TSME26 PASSWORD RESET (425197))	Initiation
Risk Level	On Track	
Monthly Updates	Work not starting until 3rd quarter.	
Special Issues		
Cost as of	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	5,000.00
	Variance (Total Budget minus- E$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

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

Project Name	**(TSME26 QC SYSTEMS (483249)) TSME26 QC SYSTEMS (483249) (On Track)**
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives
Budget	**Direct Budget**: 30,000.00 **Indirect Budget:** 0.00 **Total Budget:** 30,000.00
Principal	
Investigator/Clients	
Funding Agency	
IRB	*HUM#:* *Period of Approval:*
Project Team	*Project Lead:* Sarah Elisa Broumand
	Budget Analyst: Nicole Danielle Doher
	Production Manager: Sarah Elisa Broumand
	Senior Project Advisor: Carol Lively
	Production Manager 1:
	Production Manager 2:
Proposal #	no data
Description	QC Systems
SRO Project Period	07/2025 - 06/2026
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

Report Period	Oct, 2025 (TSME26 QC SYSTEMS (483249))	Implementing
Risk Level	On Track	
Monthly Updates	This month the focus was on getting all the security related changes needed to comply with New York Housing security requirements. Unfortunately these changes are not visible to our users, they are all backend changes including replacing old software packages and updating some code. Setting up test server to test the encryption of the database as well as the OLIVE changes to prepare to release for production.	
Special Issues	There is some concern that the security updates to comply with New York housing will end up coming the rest of the budget to do any innovations to QC Systems. For the moment we only have about 60 hours left of programming time to do any modifications.	
Cost as of	*Total Cost to Date (direct + indirect):*	12,385.67
	Est Cost at Completion (E$AC):	29,852.20

	Total Budget:			30,000.00
	Variance (Total Budget minus- E$AC):			147.80
	Reason for Variance:	negligible		
Projections as of	Dollars Projected for Month:			2,956.65
	Actual Dollars Used:			4,292.79
	Variance (Projected minus Actual):			-3,120.11
	Reason for Variance:	took more hours to apply all the security updates needed to comply with NY Housing Project. Only 50% of hours displayed here, hours are being shared with a securty budget.		

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

Other Measures

	Total Budget:			30,000.00
	Variance (Total Budget minus- E$AC):			147.80
	Reason for Variance:	negligible		

Project Name	**(TSME26 RCLS (425198)) TSME26 RCLS (425198) (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:* Hueichun Peng		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Andrew L Hupp		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	TSME26 Project		
SRO Project Period	07/2025 - 06/2026		
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	

Report Period	Oct, 2025 (TSME26 RCLS (425198))	Implementing
Risk Level	On Track	
Monthly Updates	Project is on hold due to waiting for Nautilus new API library.	
Special Issues	Project is on hold due to waiting for Nautilus new API library.	
Cost as of Nov 19, 2025	*Total Cost to Date (direct + indirect):*	12,618.22
	Est Cost at Completion (E$AC):	16,767.92
	Total Budget:	35,000.00
	Variance (Total Budget minus- E$AC):	18,232.08
	Reason for Variance: x	
Projections as of Nov 19, 2025	*Dollars Projected for Month:*	6,945.79
	Actual Dollars Used:	6,573.42

| | | Variance (Projected minus Actual): | | | 372.37 |
| | | Reason for Variance: | x | | |

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

Other Measures

			Units at Complete	RR	HPI
		Current Goal:			
		Goal at Completion:			

Project Name	**(TSME26 REPLACE RPAY (423463)) TSME26 REPLACE RPAY (423463) (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:* Hueichun Peng		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Carol Lively		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	TSME26 Project		
SRO Project Period	06/2025 - 07/2026		
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

Report Period	Oct, 2025 (TSME26 REPLACE RPAY (423463))	Planning
Risk Level	On Track	
Monthly Updates	Meeting with DCO users, MSMS users and MSMS team (Tricia) to understand the use cases. Meeting with Business Office to clarify the workflow with Concourse.	
Special Issues		
Cost as of Nov 19, 2025	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	35,000.00
	Variance (Total Budget minus- E$AC):	35,000.00
	Reason for Variance: x	
Projections as of Nov 19, 2025	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	0.00

		Variance (Projected minus Actual):		0.00

| | | *Reason for Variance:* | x | |

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

Other Measures

		Units at Complete	**RR**	**HPI**
	Current Goal:			
	Goal at Completion:			

Project Name	(TSME26 SURVEYTRAK MAINTENANCE (483257)) TSME26 SURVEYTRAK MAINTENANCE (483257) (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:* Jeffrey L Smith		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Carol Lively		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	SurveyTrak Maintenance		
SRO Project Period	07/2025 - 06/2026		
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

Report Period	Oct, 2025 (TSME26 SURVEYTRAK	Implementing
Risk Level	On Track	
Monthly Updates	-Compare test and prod code WTrak/WebLog -SRSM -ST Admin 25: Bug fixes -ST Admin 25: Termination Processing -ST Admin 25 code to ST Admin 11 -ST Admin 11: Final test and release -ST Employee Data Merge -ST/PB Team Meeting - Testing SurveyTrak 25 with Windows 11	
Special Issues		
Cost as of Nov 19, 2025	*Total Cost to Date (direct + indirect):*	4,469.17
	Est Cost at Completion (E$AC):	10,301.47

	Total Budget:		10,000.00
	Variance (Total Budget minus- E$AC):		-301.47
	Reason for Variance:	See below	
Projections as of Nov 19, 2025	**Dollars Projected for Month:**		771.87
	Actual Dollars Used:		1,965.47
	Variance (Projected minus Actual):		-1,193.60
	Reason for Variance:	See notes	

Measures

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

Other Measures

	Total Budget:		10,000.00
	Variance (Total Budget minus- E$AC):		-301.47
	Reason for Variance:	See below	

Project Name	**(TSME26 TEAM LOCATION (424466)) TSME26 TEAM LOCATION (424466) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 9,000.00	**Indirect Budget:** 0.00	**Total Budget:** 9,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Mark Simonson		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Carol Lively		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	TSME26 Project		
SRO Project Period	07/2025 - 06/2026		
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		

Report Period	Oct, 2025 (TSME26 TEAM LOCATION (424466))	Planning
Risk Level	On Track	
Monthly Updates	Work not scheduled to start until MSMS 2.0 API's are available by end of the month of september or early October. No work expected for month of Auaugs.	
Special Issues	There is a concern about the amount of budget considering the unkowns we may run into switching from MSMS to MSMS 2.0.	
Cost as of	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	9,003.42
	Total Budget:	9,000.00
	Variance (Total Budget minus- E$AC):	-3.42
	Reason for Variance: negilgible	
Projections as of	*Dollars Projected for Month:*	0.00

	Actual Dollars Used:			0.00
	Variance (Projected minus Actual):			0.00
	Reason for Variance:	did not start work yet		

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

Other Measures

	Actual Dollars Used:			0.00
	Variance (Projected minus Actual):			0.00
	Reason for Variance:	did not start work yet		

Measures			RR	HPI
	Current Goal:			