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## ***Survey Research Operations***

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

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

***September 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  
(CARE Military) Concussion Assessment, Research and Education (CARE) Consortium 2022 - Military  
(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022  
(CCS) Community College Survey  
(CVFS-SCAN) Chitwan Valley Family Study - Study on Cognition and Aging in Nepal  
(FFCWS) Future of Families and Child Wellbeing Study  
(HCHD-2025 Locating) Housing & Children's Healthy Development 2025 Locating  
(Health and Well Being in SE MI) Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan)  
(Healthy Brain Project) Healthy Brain Project  
(Hospitals Sharing Data) Hospitals Sharing Patient Data  
(HRS 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 Spring) Life History Mail Study Spring 2025  
(MTF Base Year 2022\_27) Monitoring the Future Base Year 2022-2027  
(MTF Early Panel Pilot) Monitoring the Future: A Cohort-Sequential Panel Study of Drug Use, Ages 19-65 - Administrative Supplement #1 (8/10th Grade Panel)  
(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027  
(NDWS) National Dementia Workforce Study  
(NYCHVS) New York City Housing and Vacancy Survey  
(PR-PSID) Puerto Rico Panel Study of Income Dynamics  
(PSID CDS23 Phase 2) PSID Childhood Development Supplement 2023 Phase 2  
(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	
ANES 2024	Sponsored	Closing	Andrew L Hupp	🟡	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	
BFY	Sponsored	Implementing	Piotr Dworak	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟡	🟡	
CAMS 2025	Sponsored	Initiation	Gloria J Baker	🟩	🟩	🟩	🟩	🟩	🟩	🟩	🟢	🟢	
CARE Military	Sponsored	Closing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	
CARE SALTOS MTEC	Sponsored	Closing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	
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	Implementing	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 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	Planning	Camila Kendall	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	
PSID CDS23 Phase 2	Sponsored	Closing	Camila Kendall	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	
PSID TAS 2025	Sponsored	Planning	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	<div><div><div>Pre Production Start: 03/01/2024</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start: 07/10/2024</div><div>DC Start: 08/01/2024</div></div><div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start: 07/09/2024</div><div>SS Train End:</div><div>DC End: 03/31/2025</div></div></div>		
Other Project Team Members	Erin McSpadden - Project Manager for the methods pilot Sharon Parker - Production Manager for the methods pilot Raphael Nishimura - Sampling (pilot and production) Paul Burton - Sampling and Reporting Makenna Harrison - Sampling and Reporting Grace DesJardins - Project Support Marsha Skoman - SurveyTrak programming + Tech Lead Karl Dinkelmann - Blaise oversight + Tech Lead James Rodgers - MSMS + Tech Lead Ashwin Dey - WebTrak Pam Swanson - MSMS set-up programming Sarah Broumand - PQT and QC set-up Peter Sparks - Blaise programming Max Malhotra - Blaise programming Youhong Liu - Blaise programming Shanie Empie - Login portal Hueichun Peng - Self-scheduler Tony Romanowski - Technical specifications and testing Andrew Piskorowski - ODS Kelly Chatain - MSMS specs and testing Elizabeth Ohryn - Testing, SSL support William 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		

<b>Incentive</b>	Yes, R; Yes, INF; Yes, Other (Spouse/partner)
<b>Administration</b>	SRO Group
<b>Payment Type</b>	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)
<b>Payment Method</b>	Check through STrak RPay System; Check through other system (MSMS via RPay); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (MSMS via RPay); Imprest Cash Fund from ISR Business Office (MSMS via RPay)

<b>Report Period</b>	Sep, 2025 (ANES 2024)	Closing
<b>Risk Level</b>	On Track	

<b>Monthly Updates</b>	<p>The 2024 data collection has ended.</p> <p>In-person:</p> <ul style="list-style-type: none"> <li>-PRE: 1,042 interviews (966 in-person, 68 phone, 8 mixed + 0 partials)</li> <li>-POST: 90% reinterview goal (n=938)</li> <li>-Actual: 925 (89%); 372 In-person, 220 Telephone, 332 Video + 1 partial</li> </ul> <p>Web - Fresh</p> <ul style="list-style-type: none"> <li>-PRE: 2,063 interviews (2,022 + 41 partials)</li> <li>-POST: 85% reinterview goal (n=1,754)</li> <li>-Actual: 1,769 (86%) (1,721 + 48 partials)</li> </ul> <p>Web - Panel</p> <ul style="list-style-type: none"> <li>-PRE: 2,171 interviews (2,158 + 13 partials)</li> <li>-POST: 90% reinterview goal (n=1,954)</li> <li>-Actual: 2,070 (95%) (2,040 + 30 partials)</li> </ul> <p>Web - GSS</p> <ul style="list-style-type: none"> <li>-PRE: 987 interviews (978 + 9 partials)</li> <li>-POST: 85% reinterview goal (n=839)</li> <li>-Actual: 807 (82%) (807 + 26 partials)</li> </ul> <p>Paper</p> <ul style="list-style-type: none"> <li>-PRE: 245</li> <li>-POST: 85% reinterview goal (n=208)</li> <li>-Actual: 202 (82%)</li> </ul> <p>SRO finished up the most important problem (MIP) questions coding.</p> <p>ANES reviewed their deliverables and requested the login data. We will schedule a meeting with them to understand what they want since that data is a little messy (i.e. if we can clean up the data to make it more useable). They also requested the insufficient partial data for pre-election cases.</p> <p>The remaining work on the study consists of:</p> <ul style="list-style-type: none"> <li>--GSS weighting/final weights</li> <li>--Vote validation work</li> <li>--Delivery of login data</li> <li>--Pre-election insufficient partial data</li> <li>--Technical (methodology) report.</li> </ul> <p>We have projections for the some of the above work on the current grant. We've set-up a new shortcode (and projections) for the weighting, vote validation, and manuscript preparation of findings from the study.</p>	
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<b>Special Issues</b>			
<b>Cost as of Oct 20, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>		7,525,582.81
	<b>Est Cost at Completion (E\$AC):</b>		7,520,927.44
	<b>Total Budget:</b>		7,526,240.00
	<b>Variance (Total Budget minus- E\$AC):</b>		5,312.56
	<b>Reason for Variance:</b>	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.	
<b>Projections as of Oct 20, 2025</b>	<b>Dollars Projected for Month:</b>		30,314.56
	<b>Actual Dollars Used:</b>		31,047.04
	<b>Variance (Projected minus Actual):</b>		-732.48
	<b>Reason for Variance:</b>		

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



<b>Project Name</b>	<b>(BFY) Baby's First Years (Some Concerns)</b>												
<b>Project Mode</b>	Primary: Face to Face      Total of Modes: 1												
<b>Project Type</b>	Sponsored Projects												
<b>Budget</b>	<b>Direct Budget:</b> 750,000.00	<b>Indirect Budget:</b> 112,500.00	<b>Total Budget:</b> 862,500.00										
<b>Principal Investigator/Clients</b>	Dr. Greg Duncan (University of California - Irvine)												
	Dr. Kimberly Noble (Teachers College Columbia University)												
	Dr. Katherine Magnuson (University of Wisconsin)												
<b>Funding Agency</b>	National Institute of Child Health and Human Development (NICHD)												
<b>IRB</b>	<b>HUM#:</b> HUM00137963	<b>Period of Approval:</b>											
<b>Project Team</b>	<b>Project Lead:</b> Piotr Dworak												
	<b>Budget Analyst:</b> David Kellermeyer												
	<b>Production Manager:</b> Veronica Connors-Burge												
	<b>Senior Project Advisor:</b> Stephanie A Chardoul												
	<b>Production Manager 1:</b> Margaret Lavanger												
	<b>Production Manager 2:</b>												
<b>Proposal #</b>	no data												
<b>Description</b>	<p>University of Michigan Survey Research Center (U-M SRC) is contracted to recruit and interview participants for Baby's First Years -- a longitudinal randomized control trial study.</p> <p>The study's full name, listed on sub-contract documents, is Household Income and Child Development in Early Years. The study will draw on a convenience sample of mothers and their newborns in four US metropolitan areas: New York City; Omaha/Lincoln; New Orleans; and Minneapolis. One or two hospitals, listed in this application, will be used as recruiting sites in each area. The study uses a randomized control trial design in which low-income mothers and newborns will be randomly assigned to a treatment group that receives an unconditional income enhancement -- cash payments of \$333 per month—an amount roughly comparable to a variety of income assistance policies in the U.S. and shown to be associated with meaningful improvements for poor children in prior studies—or to a control condition that receives \$20 per month. In both groups, the payments will be made for the first 40 months of the child's life. To understand the impacts of added income on children's development, researchers will assess treatment/control group differences at ages 1, 2 and 3 on measures of cognitive, language, memory, self-regulation and socio-emotional development. Recruitment is scheduled to start in April of 2018, and each follow-up interview will be conducted 12 months later -- close in time to the child's 1st, 2nd, and 3rd birthday. The feasibility of the approach has been established in a one-year pilot conducted in 2014 at the New York Presbyterian Hospital/Columbia University Medical Center.</p> <p>The Principal Investigators are Dr. Greg Duncan from University of California Irvine (UCI), Dr. Kimberly Noble from Teacher's College Columbia University (TCCU), and Katherine Magnuson from University of Wisconsin-Madison (UWM). UCI (Dr. Duncan) and TCCU (Dr. Noble) are the institutions and signatories funding the U-M SRC subcontract from various sources including the National Institute for Child Health and Human Development (NICHD) and private foundations listed in this application. The study research team also includes co-investigators Lisa Gennetian (New York University), and Hiro Yoshikawa (New York University).</p> <p>SRO will be responsible for four interactions with the selected mothers/infants:</p> <ul style="list-style-type: none"> <li>• Baseline will occur immediately (within 24-48 hours) after birth, in the hospital;</li> <li>• Wave 1 will be a telephone interview with the mother when the child is 12 months old;</li> <li>• Wave 2 will be an in-person interview in the family's home that includes survey, developmental assessment, biomarker collection, and video recorded behavioral interaction when the child is 24 months old;</li> <li>• Wave 3 will be an in-person survey done while the mother and child are visiting a lab for other clinical tests when the child is 36 months old.</li> </ul> <p>Each data collection phase/wave will be a full 12 months, with Baseline starting in April 2018:</p> <p>Recruitment/Baseline: 04/01/2018 - 03/31/2019  Wave 1: 04/01/2019 - 03/31/2020  Wave 2: 04/01/2020 - 03/31/2021  Wave 3: 04/01/2021 - 03/31/2022</p>												
<b>SRO Project Period</b>	10/2017 - 12/2020												
<b>Data Col Period</b>	04/2018 - 12/2020												
<b>Security Plan</b>	NA												
<b>Milestones</b>	<table border="0"> <tr> <td><b>Pre Production Start:</b> 10/01/2017</td> <td><b>Pretest Start:</b></td> </tr> <tr> <td><b>Pretest End:</b></td> <td><b>Recruitment Start:</b> 01/01/2018</td> </tr> <tr> <td><b>Staffing Complete:</b> 02/07/2018</td> <td><b>GIT Start:</b> 03/19/2018</td> </tr> <tr> <td><b>SS Train Start:</b> 03/20/2018</td> <td><b>SS Train End:</b> 03/22/2018</td> </tr> <tr> <td><b>DC Start:</b> 05/07/2018</td> <td><b>DC End:</b> 06/30/2022</td> </tr> </table>			<b>Pre Production Start:</b> 10/01/2017	<b>Pretest Start:</b>	<b>Pretest End:</b>	<b>Recruitment Start:</b> 01/01/2018	<b>Staffing Complete:</b> 02/07/2018	<b>GIT Start:</b> 03/19/2018	<b>SS Train Start:</b> 03/20/2018	<b>SS Train End:</b> 03/22/2018	<b>DC Start:</b> 05/07/2018	<b>DC End:</b> 06/30/2022
<b>Pre Production Start:</b> 10/01/2017	<b>Pretest Start:</b>												
<b>Pretest End:</b>	<b>Recruitment Start:</b> 01/01/2018												
<b>Staffing Complete:</b> 02/07/2018	<b>GIT Start:</b> 03/19/2018												
<b>SS Train Start:</b> 03/20/2018	<b>SS Train End:</b> 03/22/2018												
<b>DC Start:</b> 05/07/2018	<b>DC End:</b> 06/30/2022												

Other Project Team Members	Stephanie Chardoul (SPA) Piotr Dworak (Lead) Tony Romanowski (PM) Daric Thorne (PM/SSA) Barb Homburg (PM) Peggy Lavanger (PM) Jim McClure (DCS) Jeff Smith (tech lead) Jim Rodgers (MSMS consultant) Andrew Hupp (MSMS consultant) Pam Swanson (MSMS programmer) Dave Dybicki (Blaise) Colette Keyser (Blaise) Tricia Blanchard (MSMS) Kyle Goodman (Help Desk)	
Other Project Name	HHICD Household Income and Childhood Development	
Sample Mgmt System	MSMS	
Data Col Tool	Blaise 5	
Hardware	Laptop; [UM cell] Phone	
DE Software	N/A	
QC Recording Tool	Other (to be specified)	
Incentive	Yes, R	
Administration	SRO Group	
Payment Type	Cash, prepaid (50)	
Payment Method	Check through other system (MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (MSMS)	
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Report Period	Sep, 2025 (BFY)	Implementing
Risk Level	Some Concerns	
Monthly Updates	BFY Age 5- 8:  BFY continues re-contact and lab recruitment work throughout Age 8 (August 2027).  Our main concern at this point is the increasing overrun due to increased scope at the end of the Age 6 lab recruitment and staffing adjustments.  In July, we finished supporting A6 lab data collection with recruitment of some of the hardest to reach cases (via phone and in-person). In August, we brought in two interviewers and ae now focusing on following up with cases which reach Age 6 + 4 months and have completed their lab visits.  Our work on staying in touch with participants will continue until the next wave of Age 8 lab data collection in June 2026 - July 2027.  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.  In August and September, we will be evaluating the cost of addition but expect that, given their experience, the 2 on-staffers will be a net efficiency for the project.  7 iwrs 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 iwrs 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. Technical systems: BFY had to pause work due to MSMS issues for roughly 5-6 days. Some iwrs were able to work offline but could not sync their data and receive any new cases.	
Cost as of Oct 16, 2025	Total Cost to Date (direct + indirect):	316,118.17

<b>Est Cost at Completion (E\$AC):</b>		1,016,134.30		
<b>Total Budget:</b>		862,500.00		
<b>Variance (Total Budget minus- E\$AC):</b>		-153,634.30		
<b>Reason for Variance:</b>		This variance represents one budgeting scenario which might be needed to complete the work through August 2027. We are revisiting the projections internally and with Pls.		
<b>Projections as of Oct 16, 2025</b>	<b>Dollars Projected for Month:</b>	20,852.10		
	<b>Actual Dollars Used:</b>	18,987.91		
	<b>Variance (Projected minus Actual):</b>	1,864.19		
	<b>Reason for Variance:</b>	After Age 6 Lab recruitment concluded, we expect some savings between now and July 2026.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>	n/a	n/a	n/a
	<b>Goal at Completion:</b>	n/a	n/a	n/a
	<b>Current Actual:</b>	n/a	n/a	n/a
	<b>Estimate at Complete:</b>	n/a	n/a	n/a
	<b>Variance:</b>			
<b>Other Measures</b>				

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	David Weir		
Investigator/Clients			
Funding Agency			
IRB	HUM#: HUM00246462		Period of Approval: 9/3/2025
Project Team	<b>Project Lead:</b> Gloria J Baker <b>Budget Analyst:</b> Cindy Tsao <b>Production Manager:</b> Jennifer C Arrieta <b>Senior Project Advisor:</b> Evanthia Leissou <b>Production Manager 1:</b> <b>Production Manager 2:</b>		
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	<div> <div> <b>Pre Production Start:</b> 07/01/2025   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> 10/17/2025 </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
Other Project Team Members	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	Other (HRS study staff is responsible for)		
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		
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Report Period	Sep, 2025 (CAMS 2025)		Initiation
Risk Level	On Track		
Monthly Updates	In the month of September 1. WebLog and WebTrak programming and testing continued 2. Updated and instructed new staff on logging documentation 3. Reviewed proofs and signed off on materials from DataForce 4. 1st mailing of 7480 packets scheduled to go out Sept 16		

<b>Special Issues</b>				
<b>Cost as of Oct 20, 2025</b>	<i>Total Cost to Date (direct + indirect):</i>			347,608.38
	<i>Est Cost at Completion (E\$AC):</i>			494,556.03
	<i>Total Budget:</i>			534,085.00
	<i>Variance (Total Budget minus- E\$AC):</i>			39,528.97
	<i>Reason for Variance:</i>			Variance due to revised projections from DataForce for changing the final mailing from priority mail to first class.
<b>Projections as of Oct 20, 2025</b>	<i>Dollars Projected for Month:</i>			329,192.69
	<i>Actual Dollars Used:</i>			331,278.65
	<i>Variance (Projected minus Actual):</i>			-2,085.96
	<i>Reason for Variance:</i>			The variance is due primarily to staff hours being slightly over projected
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<i>Current Goal:</i>			
	<i>Goal at Completion:</i>			
	<i>Current Actual:</i>			
	<i>Estimate at Complete:</i>			
	<i>Variance:</i>			
<b>Other Measures</b>				

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

Report Period	Sep, 2025 (CARE Military)			Closing
Risk Level	On Track			
Monthly Updates	We are reviewing the final report and wrapping up some close-out items. The project lead remains in communication with the PI team regarding the potential future of CARE. Additionally, three regular staff members attended the two-day annual CARE Investigator Conference in Chicago, IL, September 8-10.			
Special Issues				
Cost as of Sep 30, 2025	Total Cost to Date (direct + indirect):			1,684,473.95
	Est Cost at Completion (E\$AC):			1,684,473.95
	Total Budget:			1,685,902.70
	Variance (Total Budget minus- E\$AC):			1,428.75
	Reason for Variance:	We do not have new funding currently to support the military work. However, military work resumed in April 2024 with civilian funds.  **Note: In September 2025, we allocated \$12,332.58 to the Military project with the Civilian funds. This brings our cumulative spending on the military project to \$722,711.74 from April 2024 to September 2025. The current spending on Military is reflected the underrun amount in Civilian funds.		
Projections as of Sep 30, 2025	Dollars Projected for Month:			0.00
	Actual Dollars Used:			52,516.66
	Variance (Projected minus Actual):			-52,516.66
	Reason for Variance:	Since we are using Civilian funds there are no projections for this account.		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

<b>Project Name</b>	<b>(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022 (On Track)</b>		
<b>Project Mode</b>	Primary: Telephone	Secondary: Web	Total of Modes: 2
<b>Project Type</b>	Sponsored Projects		
<b>Budget</b>	<b>Direct Budget:</b> 3,718,978.00	<b>Indirect Budget:</b> 966,936.00	<b>Total Budget:</b> 4,685,914.00
<b>Principal</b>	Dr. Steven Broglio (U of M Kinesiology)		
<b>Investigator/Clients</b>	Dr. Michael McCrea (Medical College of Wisconsin)		
	Dr. Thomas McAllister (Indiana University School of Medicine)		
<b>Funding Agency</b>			
<b>IRB</b>	<b>HUM#:</b> 00202691	<b>Period of Approval:</b> 7/23/2021 - open	
<b>Project Team</b>	<b>Project Lead:</b> Donnalee Ann Grey-Farquharson		
	<b>Budget Analyst:</b> David Kellermeyer		
	<b>Production Manager:</b> Barbara Aghababian-Homburg		
	<b>Senior Project Advisor:</b> Barbara Lohr Ward		
	<b>Production Manager 1:</b> Hongyu Johnson		
	<b>Production Manager 2:</b> Keith Liebetreu		
<b>Proposal #</b>	no data		
<b>Description</b>	<p>In 2014, the U.S. Department of Defense (DoD) and the National Collegiate Athletic Association (NCAA) established and funded the Concussion Assessment, Research and Education (CARE) Consortium to inform science, clinical care and public policy related to concussion and repetitive head impact exposure (HIE) in U.S. Military Service Academy (MSA) cadets and collegiate student-athletes. Since then, CARE has enrolled &gt;50,000 MSA cadets/midshipmen and NCAA student-athletes from 30 participating collegiate institutions, representing 26 NCAA sports, and military training and other recreational activities. In addition, the CARE study has captured data on over 5,000 concussed cadets/midshipmen and athletes – the largest concussion database of its kind. This public-private study is designed to answer key knowledge gaps around clinical and neurobiological recovery, brain structure and function, and factors predicting outcomes in MSA members and NCAA student-athletes. This CARE/SALTOS Integrated (CSI) Study phase investigates the nature and causes of long-term effects of head impact exposure and concussion/mild traumatic brain injury (mTBI) in former NCAA student-athletes and military service members. The data collected in this phase will build on that collected in previous phases</p> <p>SRO provides consultation, respondent locating activities and data collection for respondents in the longitudinal Concussion Assessment, Research and Education (CARE) study, with the goal of securing participation from 7,500 unique past-CARE study participants. Participants will complete the same set of study assessments at two time points over the five-year project period. The project follows collegiate athletes post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure. Specifically, SRO decentralized field interviewers will locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.</p> <p>This budget assumes an overall SRO involvement period of approximately 44 months over two waves. Wave 1 SRO involvement will begin in December 2021 with data collection taking place over approximately 12 months, beginning approximately May 2022. Wave 2 SRO involvement will begin in November 2023 with data collection taking place over approximately 12 months starting in May 2024.</p> <p>Currently, the total cost for the overall scope of work (based on the currently committed funding from all sources) is estimated at \$4,685,914. This includes \$3,718,978 direct and \$966,936 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders). As additional sources of funding are identified and those resources committed to SRO survey data collection activities, or inversely if a funder withdraws or reduces their level of funding to the project, the scope of work (e.g., the number of interviews to be collected) will increase or decrease respectively.</p> <p>The estimate of funding contributed by the Department of Defense through the MTEC RFP is \$2,277,689. This includes \$1,807,689 direct costs and \$470,000 indirect costs budgeted at the 26% indirect cost rate. The proposed period of support is September 1, 2021 through August 31, 2025.</p>		
<b>SRO Project Period</b>	10/2021 - 08/2026		
<b>Data Col Period</b>	03/2022 - 02/2026		
<b>Security Plan</b>	NA		
<b>Milestones</b>	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p><b>Pre Production Start:</b></p> <p><b>Pretest End:</b></p> <p><b>Staffing Complete:</b></p> <p><b>SS Train Start:</b></p> <p><b>DC Start:</b></p> </div> <div style="width: 45%;"> <p><b>Pretest Start:</b></p> <p><b>Recruitment Start:</b></p> <p><b>GIT Start:</b></p> <p><b>SS Train End:</b></p> <p><b>DC End:</b></p> </div> </div>		

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

<b>Report Period</b>	Sep, 2025 (CARE SALTOS MTEC)	Closing
<b>Risk Level</b>	On Track	
<b>Monthly Updates</b>	We are reviewing the final report and wrapping up some close-out items. The project lead remains in communication with the PI team regarding the potential future of CARE. Additionally, three regular staff members attended the two-day annual CARE Investigator Conference in Chicago, IL, September 8-10.	

<b>Special Issues</b>			
<b>Cost as of Sep 30, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>		4,260,501.21
	<b>Est Cost at Completion (E\$AC):</b>		4,260,501.21
	<b>Total Budget:</b>		4,685,914.00
	<b>Variance (Total Budget minus- E\$AC):</b>		425,412.79
	<b>Reason for Variance:</b>	We adjusted two regular staff projections in August and September 2025 due to their involvement in tasks for other projects.	
		**Note: In September 2025, we allocated \$12,332.58 to the Military project with the Civilian funds. This brings our cumulative spending on the military project to \$722,711.74 from April 2024 to September 2025. The current spending on Military is reflected the underrun amount in Civilian funds.	
<b>Projections as of Sep 30, 2025</b>	<b>Dollars Projected for Month:</b>		30,636.40
	<b>Actual Dollars Used:</b>		24,597.08
	<b>Variance (Projected minus Actual):</b>		6,039.32
	<b>Reason for Variance:</b>	Regular staff used fewer hours than projected.	

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

<b>Other Measures</b>	
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Project Name	(CCS) Community College Survey (On Track)		
Project Mode	Primary: Web      Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 560,774.00	Indirect Budget: 84,115.00	Total Budget: 644,889.00
Principal	Hana Lahr (Teachers College, Columbia University)		
Investigator/Clients	Veronica Minaya (Teachers College, Columbia University)		
	Rachel Baker (University of Pennsylvania)		
Funding Agency	Ascendium Education Group		
IRB	HUM#: 00237400		Period of Approval:
Project Team	Project Lead: Jeffrey Albrecht Jr		
	Budget Analyst: Nicole Danielle 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 End:  Staffing Complete:  SS Train Start:  DC Start: 10/13/2025		Pretest Start:  Recruitment Start:  GIT Start:  SS Train End:  DC End: 11/02/2025
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)		
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Report Period	Sep, 2025 (CCS)		Implementing
Risk Level	On Track		
Monthly Updates	-In September, Jeffrey, Hueichun, Steven, and Ed worked on CCS setup. E -Ed set up the data downloads and prepared preload. -Steven QC'd and cleaned preload addresses before sending to PrintCopyMail. -Jeffrey loaded preload to Web SMS and created links for Hueichun to include in emails and text message and for PrintCopyMail to create QR codes for the invitation cards. -Jeffrey tested several production test lines and checked data to confirm all populated as expected.		
Special Issues	None to report		

<b>Cost as of Oct 09, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	894,626.67
	<b>Est Cost at Completion (E\$AC):</b>	918,478.82
	<b>Total Budget:</b>	644,889.00
	<b>Variance (Total Budget minus- E\$AC):</b>	5,643.18
	<b>Reason for Variance:</b>	The underrun is primarily due to an error, in which Nicole accidentally added an R&D fee that is automatically generated, so that fee (for the mailing specifically) was doubled in projections until noticed this month. Jeff has requested to use the underrun to add effort for the team.

<b>Projections as of Oct 09, 2025</b>	<b>Dollars Projected for Month:</b>	48,965.81
	<b>Actual Dollars Used:</b>	34,192.19
	<b>Variance (Projected minus Actual):</b>	14,773.62
	<b>Reason for Variance:</b>	Data collection was delayed two weeks. Charges that were slated for data collection (tokens of appreciation, mailing) did not hit in September and have been moved forward to October.

Measures		Units at Complete	RR	HPI
	<b>Current Goal:</b>	1354	30%	
	<b>Goal at Completion:</b>	1354	30%	
	<b>Current Actual:</b>	1102	24.4%	
	<b>Estimate at Complete:</b>	1354	30%	
	<b>Variance:</b>	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	<p>SRO is working cooperatively with the PIs and their research team as well as the Institue for Social and Environmental Research – Nepal – ISERN – to provide consultation, programming and support for data collection over 2 waves of interviewing.</p> <p>SRO will provide support in the following areas: instrument programming and testing, sample management system programming and testing, and data delivery.</p>		
SRO Project Period	07/2024 - 05/2027		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 08/01/2024  Pretest End: 10/31/2024  Staffing Complete:  SS Train Start: 02/03/2025  DC Start: 02/19/2025 </div> <div> Pretest Start: 10/15/2024  Recruitment Start:  GIT Start: 12/26/2024  SS Train End: 02/12/2025  DC End: </div> </div>		
Other Project Team Members	Technical Lead: Jennie Williams, TSG Programmer Analyst-Blaise: Peter Sparks Programmer Analyst-Surveytrak Int: Marsha Skoman, TSG Programmer Analyst-Weblog: Ashwin Dey, TSG Database Administrator: Lishwu Ke, TSG Data Manager Specialist: Jennie Williams, Valyn Dall, TSG Help Desk: Emmanuel Ellis, TSG		
Other Project Name	HCAP Nepal,		
Sample Mgmt System	SurveyTrak; Project specific system (Weblog, QC system )		
Data Col Tool	Blaise 4.8		
Hardware	Laptop		
DE Software	Blaise 4.8 BIA		
QC Recording Tool	Other (TBD)		
Incentive	Not used		
Administration	NA		
Payment Type	N/A		
Payment Method	N/A		
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Report Period	Sep, 2025 (CVFS-SCAN)	Implementing	
Risk Level	On Track		
Monthly Updates	Project Updates:		
	Part 1 of the Respondent questionnaire is currently in production. There are 2,701 completed R Part 1's, and 2,679		

completed Inf interviews, 1,067 Part 2 iws have been completed, including WBD. 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 as the funding had not been received at Georgetown. Now that it has, still there will be minimal SRO 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.

<b>Special Issues</b>		NIH Funding Review		
<b>Cost as of Oct 16, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	410,393.86		
	<b>Est Cost at Completion (E\$AC):</b>	560,139.23		
	<b>Total Budget:</b>	575,439.00		
	<b>Variance (Total Budget minus- E\$AC):</b>	15,299.77		
	<b>Reason for Variance:</b>	Wave 2 dates and scope have been discussed and communicated to SRO. We have updated proejtions and will continue to do so.		
<b>Projections as of Oct 16, 2025</b>	<b>Dollars Projected for Month:</b>	1,507.06		
	<b>Actual Dollars Used:</b>	2,004.23		
	<b>Variance (Projected minus Actual):</b>	-497.17		
	<b>Reason for Variance:</b>	No comments. The actual and projected dollars are very close.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
<b>Other Measures</b>				

<b>Project Name</b>	<b>(FFCWS) Future of Families and Child Wellbeing Study (On Track)</b>		
<b>Project Mode</b>	Primary: Web	Secondary: Telephone	Total of Modes: 3
<b>Project Type</b>	Sponsored Projects		
<b>Budget</b>	<b>Direct Budget:</b> 2,765,404.00	<b>Indirect Budget:</b> 1,548,632.00	<b>Total Budget:</b> 4,314,036.00
<b>Principal Investigator/Clients</b>	Kathryn Edin (Princeton University) Jane Waldfogel (Columbia University) Anna Haskins ( University of Notre Dame)		
<b>Funding Agency</b>	Eunice Kennedy Shriver National Institute of Child Health and Human Development (NICHD)		
<b>IRB</b>	<b>HUM#:</b> HUM00255752	<b>Period of Approval:</b>	
<b>Project Team</b>	<b>Project Lead:</b> Rebecca Gatward <b>Budget Analyst:</b> Joseph Zylka <b>Production Manager:</b> Veronica Connors-Burge <b>Senior Project Advisor:</b> Shonda R Kruger-Ndiaye <b>Production Manager 1:</b> <b>Production Manager 2:</b>		
<b>Proposal #</b>	no data		
<b>Description</b>	<p>The Future of Families and Child Wellbeing Study (FFCWS, formerly The Fragile Families and Child Wellbeing Study) is based on a stratified, multistage sample of 4898 children born in 20 large U.S. cities (with populations over 200,000) between 1998 and 2000, where births to unmarried mothers were oversampled by a ratio of 3 to 1. This sampling strategy resulted in the inclusion of a large number of Black, Hispanic, and low-income families. Mothers were interviewed shortly after birth and fathers were interviewed at the hospital or by phone. Follow-up interviews have been conducted when children were approximately ages 1, 3, 5, 9, 15, and 22. When weighted, the data are representative of births in large US cities.</p> <p>The FFCWS consists of a core survey with mothers, fathers, primary caregivers, and the child (now a young adult). Additionally, collaborative project contribute questions to the surveys and collect new data on a subset of parents and children.</p> <p>Beginning with the baseline interviews in 1998-2000, the core study was originally designed to primarily address four questions of great interest to researchers and policy makers:</p> <ol style="list-style-type: none"> <li>1. What are the conditions and capabilities of unmarried parents, especially fathers?</li> <li>2. What is the nature of the relationships between unmarried parents?</li> <li>3. How do children born into these families fare? and</li> <li>4. How do policies and environmental conditions affect families and children?</li> </ol> <p>Princeton are the IRB of record for this project and we have established a reliance agreement (HUM00255752).</p>		
<b>SRO Project Period</b>	10/2024 - 06/2029		
<b>Data Col Period</b>	01/2026 - 12/2026		
<b>Security Plan</b>	NA		
<b>Milestones</b>	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
<b>Other Project Team Members</b>	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		
<b>Other Project Name</b>			
<b>Sample Mgmt System</b>	MSMS; Other (RCLS - loading cases in ST )		
<b>Data Col Tool</b>	Blaise 5		
<b>Hardware</b>	Laptop; [UM cell] Phone		
<b>DE Software</b>	NA		
<b>QC Recording Tool</b>	NA		

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

<b>Report Period</b>	Sep, 2025 (FFCWS)	Initiation
<b>Risk Level</b>	On Track	

<b>Monthly Updates</b>	<p>September 2025</p> <p>Locating steps to update contact details for Young Adults:</p> <p>Steps 1 &amp; 2 – National Change of Address (NCOA) Batch Look-Ups and Newsletter Mailing</p> <p>Newsletters were mailed on 8/7/25 to Young Adults who participated in Year 22 and then on 9/22/25 to the YA who did not participate. The newsletter included an invitation for Young Adults to update their contact information. To date, 42 study participants have completed the contact information update form.</p> <p>From the first mailing we have received notification that 136 newsletters were undeliverable, and an additional 55 were forwarded to new addresses (we have the forwarding addresses on file). The second mailing generated 166 undeliverable notices and we received forwarding addresses for 10 cases.</p> <p>Step 3 – Passive Locating</p> <p>Locators are gathering leads for the 'Reinterview' (those who completed at Y22) and have begun work on the 'Recontact' sample (those who did not complete in Y22). Locating work is 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. There are currently 629 cases in the pool awaiting locating, the remainder (169 cases) will be added shortly. Our goal is to have the passive locating effort complete and a lead found for all cases (except those where we have very little information) by the end of October, so, once we receive IRB approval, efforts can switch quickly to confirming leads prior to preparations for the precontact mailing.</p> <p>To date, some locating effort has been placed on 533 of the 629 (85%) cases currently available to the locators, of these, a lead has been found for 511 cases (96%).</p> <ul style="list-style-type: none"> <li>- R Materials, consents, protocol were submitted to the IRB earlier in September. We heard recently that the modification to the existing submissio will be reviewed by the full board on 10/27. (a full board review is unusual).</li> <li>- Technical systems - Blaise questionnaire is programmed and the PI group will be helping to test from 10/20 (~10 testers).</li> </ul> <p>MSMS development is progressing well.</p>
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<b>Special Issues</b>		
<b>Cost as of Oct 16, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	495,882.73
	<b>Est Cost at Completion (E\$AC):</b>	4,284,397.14
	<b>Total Budget:</b>	4,314,036.00
	<b>Variance (Total Budget minus- E\$AC):</b>	29,638.86
	<b>Reason for Variance:</b>	Currently projecting a small underrun - we have finished updating projections after adding the rebudget amounts to CRS.
<b>Projections as of Oct 16, 2025</b>	<b>Dollars Projected for Month:</b>	179,875.66
	<b>Actual Dollars Used:</b>	111,908.63
	<b>Variance (Projected minus Actual):</b>	67,967.03
	<b>Reason for Variance:</b>	A few team members charged fewer hours than projected due to VAC and other projects taking priority due to production schedules.

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

Other Measures

Project Name	(HCHD-2025 Locating) Housing & Children's Healthy Development 2025 Locating (On Track)		
Project Mode	Primary: Tracking      Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 74,955.00	Indirect Budget: 41,975.00	Total Budget: 116,930.00
Principal	Stephanie Chardoul (Survey Research Operations)		
Investigator/Clients	Sandra Newman (Johns Hopkins University)		
Funding Agency			
IRB	HUM#: HUM00271320		Period of Approval:
Project Team	<b>Project Lead:</b> Barbara Lohr Ward <b>Budget Analyst:</b> Carl S Remmert <b>Production Manager:</b> Carolyn Vieira-Martinez <b>Senior Project Advisor:</b> Barbara Lohr Ward <b>Production Manager 1:</b> Megan Hromco <b>Production Manager 2:</b> 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	<div> <div> <b>Pre Production Start:</b> 03/01/2025   <b>Pretest End:</b>   <b>Staffing Complete:</b> 04/30/2025   <b>SS Train Start:</b> 07/07/2025   <b>DC Start:</b> 06/27/2025 </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b> 04/01/2025   <b>GIT Start:</b>   <b>SS Train End:</b> 07/07/2025   <b>DC End:</b> 10/31/2025 </div> </div>		
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	Sep, 2025 (HCHD-2025 Locating)		Implementing
Risk Level	On Track		
Monthly Updates	<p>The H&amp;C Locating project continued with active locator outreach through the month of September, using virtually all of the remainder of available locator hours. The project team continued to send email invitations and reminders to respondents, and also began texting respondents. Email continues to be the most productive mode of contact outside of active locator outreach. At the end of September, the project team send 349 confirmed addresses to DMSS for geocoding. The updated geocodes were delivered to the study PI using a secure DropBox set up by ITS.</p> <p>In October, the SSL team will review all locating data to provide the best address for respondents, and the remainder of the addresses will be geocoded at the end of October and delivered to the PI. A final report will be prepared in November. The project is on-track with financials.</p>		

<b>Special Issues</b>				
<b>Cost as of Oct 16, 2025</b>	<i>Total Cost to Date (direct + indirect):</i>			87,732.79
	<i>Est Cost at Completion (E\$AC):</i>			115,879.03
	<i>Total Budget:</i>			116,930.00
	<i>Variance (Total Budget minus- E\$AC):</i>			535.97
	<i>Reason for Variance:</i>			The variance is insignificant
<b>Projections as of Oct 16, 2025</b>	<i>Dollars Projected for Month:</i>			23,602.85
	<i>Actual Dollars Used:</i>			21,919.47
	<i>Variance (Projected minus Actual):</i>			1,683.38
	<i>Reason for Variance:</i>			Far fewer PDMG SSA hours were used compared to projected hours. We have adjusted projections going foward.
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<i>Current Goal:</i>			
	<i>Goal at Completion:</i>			
	<i>Current Actual:</i>			
	<i>Estimate at Complete:</i>			
	<i>Variance:</i>			
<b>Other Measures</b>				

Project Name	(Health and Well Being in SE MI) Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan) (On Track)		
Project Mode	Primary: Face to Face      Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 2,409,055.00	Indirect Budget: 1,349,072.00	Total Budget: 3,758,127.00
Principal	Kristine Ajrouch (Life Course Development Program, SRC)		
Investigator/Clients	Toni Antonucchi (Life Course Development Program, SRC)		
	Laura Zahodne (Life Course Development Program, SRC)		
Funding Agency			
IRB	HUM#: HUM00154638	Period of Approval: 1/17/2025 -1/16/2026	
Project Team	Project Lead: Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Taghreid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 600 interviews with recently identified Arab Americans aged 65 or older residing in Southeast Michigan and 330 interviews with Social Relations sample members aged 65 or older. The Arab American sample will be selected based on an in-person household screening. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements. Social Relations respondents will only complete the cognitive interview. An informant interview will also be conducted for all sample members. Interviews will be conducted in English or Arabic.		
SRO Project Period	05/2019 - 03/2023		
Data Col Period	05/2023 - 03/2024		
Security Plan	No		
Milestones	<div> <div> Pre Production Start: 12/01/2022  Pretest End:  Staffing Complete: 04/10/2023  SS Train Start: 05/18/2023  DC Start: 05/30/2023 </div> <div> Pretest Start:  Recruitment Start: 02/01/2023  GIT Start: 05/16/2023  SS Train End: 05/25/2023  DC End: 03/15/2025 </div> </div>		
Other Project Team Members	Taghreid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall		
Other Project Name	Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan)		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	DRI-CARI; Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	SRO Group		
Payment Type	Check, post (\$25 Informant, \$100 R, \$200 R (end game for panel)); Cash, post (\$25 Informant, \$100 R, \$200 R (end game for panel)); Other (\$2 screener incentive)		
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office		
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Report Period	Sep, 2025 (Health and Well Being in SE ...)		Closing
Risk Level	On Track		
Monthly Updates	The project team continued to work on weights, the sampling report and the final report. A meeting with held with the PIs in mid-September to clarify the weights needed. The PI's clarification resulted in more work being projected for the DMSS team, which will take the remainder of the study funds, and push delivery of weights until late October. We are monitoring the expenditures carefully.		

<b>Special Issues</b>				
<b>Cost as of Oct 16, 2025</b>	<i>Total Cost to Date (direct + indirect):</i>			3,748,212.11
	<i>Est Cost at Completion (E\$AC):</i>			3,756,996.21
	<i>Total Budget:</i>			3,758,127.00
	<i>Variance (Total Budget minus- E\$AC):</i>			1,130.79
	<i>Reason for Variance:</i>			The variance is insignificant.
<b>Projections as of Oct 16, 2025</b>	<i>Dollars Projected for Month:</i>			4,932.68
	<i>Actual Dollars Used:</i>			4,434.99
	<i>Variance (Projected minus Actual):</i>			497.69
	<i>Reason for Variance:</i>			The variance is insignificant.
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<i>Current Goal:</i>			
	<i>Goal at Completion:</i>			
	<i>Current Actual:</i>			
	<i>Estimate at Complete:</i>			
	<i>Variance:</i>			
<b>Other Measures</b>				

Project Name	(Healthy Brain Project) Healthy Brain Project (On Track)		
Project Mode	Primary: Face to Face      Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 985,452.00	Indirect Budget: 551,854.00	Total Budget: 1,537,306.00
Principal Investigator/Clients	Kristine Ajrouch (Research Center for Group Dynamics, ISR) Toni Antonucchi (Life Course Development Program, SRC) Laura Zahodne (Life Course Development Program, SRC)		
Funding Agency			
IRB	HUM#: HUM00199306		Period of Approval: 8/8/2024 - 8/7/2025
Project Team	Project Lead: Barbara Lohr Ward Budget Analyst: Christine Evanchek Production Manager: Veronica Connors-Burge Senior Project Advisor: Nicole G Kirgis Production Manager 1: Taghreid Lovell Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	<p>The participants in this study will be Arab American men and women aged 65+ as well as non-Arab men and women aged 65+ from the Social Relations Study (SRS) (HUM00187453) living in the metropolitan Detroit area who have participated in the Detroit Aging and Memory Project (D-AMP) (HUM00154638).</p> <p>The proposed study is in response to PAR-19-070 and will test links between sociocultural experiences, brain aging, and cognitive health. The following specific aims will be accomplished by obtaining structural MRI and blood-based AD biomarker data in the Detroit-Aging and Memory Project (D-AMP). This funded parent study obtains high-quality ADRD phenotypes and genetic data on those aged 65+ from a representative sample of 600 Arab Americans, as well as panel participants (N=298) from the Social Relations Study (SRS), to compare to non-Arab Whites in the same geographic area.</p>		
SRO Project Period	07/2024 - 05/2025		
Data Col Period	07/2024 - 05/2025		
Security Plan	NA		
Milestones	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)		
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Report Period	Sep, 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. A meeting with held with the PIs in mid-September to clarify the weights needed. 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.

We are monitoring the expenditures carefully.

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**Special Issues**

<b>Cost as of Oct 16, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	1,521,821.14
	<b>Est Cost at Completion (E\$AC):</b>	1,533,556.61
	<b>Total Budget:</b>	1,537,306.00
	<b>Variance (Total Budget minus- E\$AC):</b>	3,749.39
	<b>Reason for Variance:</b>	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.
<b>Projections as of Oct 16, 2025</b>	<b>Dollars Projected for Month:</b>	10,868.75
	<b>Actual Dollars Used:</b>	10,623.57
	<b>Variance (Projected minus Actual):</b>	245.18
	<b>Reason for Variance:</b>	The variance is insignificant.

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

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**Other Measures**

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Project Name	(Hospitals Sharing Data) Hospitals Sharing Patient Data (On Track)		
Project Mode	Primary: Web	Secondary: Mail	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 122,774.00	Indirect Budget: 68,753.00	Total Budget: 191,527.00
Principal	Kayte Spector-Bagdady (UM Medical School )		
Investigator/Clients			
Funding Agency	NIH		
IRB	HUM#: HUM00251017		Period of Approval: IRB Exempt
Project Team	Project Lead: Erin McSpadden		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager: Lisa J Carn		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>The Hospitals Sharing Patient Data project aims to collect data about how hospitals share their patient data with outside commercial entities in order to shed light on current hospital practices to inform improved policy in the future. The study is funded by the National Institutes of Health through an R01 grant. This project is a survey of hospital chief information officers and data administrators from a sample of around 600 hospitals across the the United States. The goal is to collect surveys from 50% of sampled hospitals. The survey is a 15-minute web survey administered via Qualtrics. Targeted representatives at each hospital will be mailed an invitation letter with a QR code to complete a web survey along with a \$50 token of appreciation. Targeted individuals who do not complete the survey will receive a reminder letter with a paper copy of the survey with the option to complete it and return the paper survey using a self-addressed stamped envelope. the SSL will be completing reminder calls to any targeted representative who still has not completed the survey after the reminder protocol. Interviewers in the SSL will have the ability to complete CATI interviewers with any targeted contact reached by phone, as well as updating and filling in any missing contact information from the sample. SSL sample will be managed using WebSMS. The web survey will launch in February 2025 with the SSL effort launching in March 2025. Data collection will end during the month of June 2025. This research has been classified as exempt by the UM MED IRB.</p>		
SRO Project Period	12/2024 - 09/2025		
Data Col Period	02/2025 - 06/2025		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 02/01/2025   Pretest End:   Staffing Complete:   SS Train Start: 03/06/2025   DC Start: 02/25/2025 </div> <div> Pretest Start:   Recruitment Start: 01/24/2025   GIT Start:   SS Train End: 03/06/2025   DC End: 06/30/2025 </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	Web SMS		
Data Col Tool	Other (Qualtrics)		
Hardware	Desktop; Paper and Pencil; Other (SSL Phones)		
DE Software	Other (Qualtrics)		
QC Recording Tool	N/A		
Incentive	Yes, INF		
Administration	UM Group (Payments handled by PI's research staff )		
Payment Type	Cash, prepaid (\$50)		
Payment Method	Other (Cash payments from HSIP handled by PI's research staff)		
=====			
Report Period	Sep, 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.

<b>Special Issues</b>	The incorrect project budget was shared with the study PI who has agreed to cover the study cost overrun from what was projected using the outdated budget loaded into CRS.		
<b>Cost as of Oct 16, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>		195,399.34
	<b>Est Cost at Completion (E\$AC):</b>		195,399.34
	<b>Total Budget:</b>		191,527.00
	<b>Variance (Total Budget minus- E\$AC):</b>		-3,872.34
	<b>Reason for Variance:</b>	As mentioned in the last report, the wrong budget was loaded into the CRS. The projected overrun has decreased from around 12k to about 3k. Costs for statistical weighting and project archiving came in lower than projected.	

<b>Projections as of Oct 16, 2025</b>	<b>Dollars Projected for Month:</b>	13,020.17
	<b>Actual Dollars Used:</b>	5,441.59
	<b>Variance (Projected minus Actual):</b>	7,578.58
	<b>Reason for Variance:</b>	Costs for statistical weighting and archiving came in lower than expected.

Measures		Units at Complete	RR	HPI
	<b>Current Goal:</b>	200	32%	N/A
	<b>Goal at Completion:</b>	200	32%	N/A
	<b>Current Actual:</b>	207	32%	
	<b>Estimate at Complete:</b>	208	32%	
	<b>Variance:</b>			

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: 15,188,298.00	Indirect Budget: 5,467,789.00	Total Budget: 20,656,087.00
Principal Investigator/Clients	David Weir (ISR-SRC)		
Funding Agency			
IRB	HUM#: HUM000611128		Period of Approval: 6/7/2023-6/6/2024
Project Team	Project Lead: Evanthia Leissou		
	Budget Analyst: David Kellermeyer		
	Production Manager: Andrea Sims		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Derek Dubuque		
	Production Manager 2: Jennifer C Arrieta		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.		
SRO Project Period	05/2023 - 12/2025		
Data Col Period	05/2024 - 08/2025		
Security Plan	NA		
Milestones	<div>Pre Production Start: 05/15/2023Pretest Start: 01/29/2024Pretest End: 02/18/2024Recruitment Start: 12/19/2023Staffing Complete: 03/15/2024GIT Start: 04/22/2024SS Train Start: 04/23/2024SS Train End: 04/29/2024DC Start: 05/13/2024DC End: 08/30/2025</div>		
Other Project Team Members	Alex Warju (Production Manager), Derek Dubuque (Production Manager), Gary Hein (Project Manager), Erin McSpadden (Project Manager), Daniah Buageila (Project Manager), Janet McBride (Project Assistant), Paul Burton (Stats/Sampling), Vanessa Clarke (Project Assistant), Jeannie Baker (Project Manager), Chelsea Graham (Project Manager), Melissa Luker (Project Assistant), Anthony Romanowski (Project Manager), Edwina Yang (Project Assistant), Andria Shimoura Goedert (Project Assistant), Kirsten LoDuca (Project Assistant)  Tech Team: Karl Dinkelmann, Jeff Smith, Jim Rodgers, Laura Yoder, Marsha Skoman, Ashwin Dey, Pam Swanson, David Bolt, Deb Wilson, Jennie Williams, Rose Zybdel, Stephanie Windisch, Holly Ackerman, Shane Empie, Kelly Chatain, Brianna Sabol, Kelly Lieske, Asia Paige		
Other Project Name	HRS 2024 Panel		
Sample Mgmt System	SurveyTrak; MSMS		
Data Col Tool	Blaise 5; SAQ		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Blaise 5 Coding Application); External vendor (DataForce)		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	NA		
Payment Type	Check, prepaid (\$100 (Interview)); Check, post (\$50 (WBD), \$20 (SSA), \$100/\$150 Endgame); Cash, post (\$20 (SAQ), \$100/\$150 Endgame)		
Payment Method	Check through STRak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office		
=====			
Report Period	Sep, 2025 (HRS 2024)		Implementing
Risk Level	On Track		
Monthly Updates	-The last day of HRS 2024 production interviewing was August 30.		

-Project and production management completed QC of final result codes, and reviewed non-final sample in MSMS for any remaining cases that could be coded as accepted partials. Some final codes will be applied by data managers once laptops returned.

-Final Blaise and result codes were delivered to HRS 9/16/2025 and DRI Recordings were delivered 9/26.

-Coding is estimated to be completed as of 9/31 for 10/2 data delivery.

-Ongoing production activities included coding, SAQ and SSA reminder mailings, logging and scanning of SAQs and SSA consent forms, Rx/Lab linkage consent verifications and result mailings, respondent incentive processing, and whole blood draw reminders and result mailings.

Measures in the table are Final per the 9/16/2025 final data delivery (week 69).

<b>Special Issues</b>		The final response rate for the HRS 2024 Panel was 69.3%, which is 0.7% below the budgeted goal. However, HRS Exec noted that this response rate surpasses the 2022 Panel's rate of 67.9%.		
<b>Cost as of Oct 16, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	19,822,777.06		
	<b>Est Cost at Completion (E\$AC):</b>	19,733,389.84		
	<b>Total Budget:</b>	20,656,087.00		
	<b>Variance (Total Budget minus- E\$AC):</b>	922,697.16		
	<b>Reason for Variance:</b>	The underrun has increased since last month due to a credit from voids for respondent incentives and travel actuals being lower than projected.		
<b>Projections as of Oct 16, 2025</b>	<b>Dollars Projected for Month:</b>	621,597.08		
	<b>Actual Dollars Used:</b>	416,147.01		
	<b>Variance (Projected minus Actual):</b>	205,450.07		
	<b>Reason for Variance:</b>	Variance is primarily due to the non-salary category of respondent payments and travel being lower than projected.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>	15769*	70%*	9.3*
	<b>Current Actual:</b>	15,606	69.3%	10.3
	<b>Estimate at Complete:</b>	15,606**	69.3%**	10.3**
	<b>Variance:</b>	163	0.7%	-1.0
<b>Other Measures</b>		*Budgeted goal RR: 70% RR		
		**Based ending data collection on 8/30/2025 (actuals per 9/16/2025 data delivery)		

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	<b>Project Lead:</b> Evanthia Leissou <b>Budget Analyst:</b> David Kellermeyer <b>Production Manager:</b> Andrea Sims <b>Senior Project Advisor:</b> Nicole G Kirgis <b>Production Manager 1:</b> Derek Dubuque <b>Production Manager 2:</b> Jennifer C Arrieta		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.		
SRO Project Period	06/2025 - 12/2027		
Data Col Period	05/2026 - 07/2027		
Security Plan	Yes		
Milestones	<div> <div> <b>Pre Production Start:</b> 06/17/2025  <b>Pretest End:</b> 02/22/2026  <b>Staffing Complete:</b> 04/08/2026  <b>SS Train Start:</b> 04/23/2026  <b>DC Start:</b> 05/06/2026 </div> <div> <b>Pretest Start:</b> 02/06/2026  <b>Recruitment Start:</b> 08/18/2025  <b>GIT Start:</b> 04/23/2026  <b>SS Train End:</b> 04/30/2026  <b>DC End:</b> 07/03/2027 </div> </div>		
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	Sep, 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 Training team finalized dates and locations for the April 2026 Interviewer GIT and Study-Specific Training, and began researching options for the March 2026 Team Leader Training
  - The Tech team progressed with DIM development; HRS delivered an updated Blaise test data model; Updates continued on MSMS, SurveyTrak, RProfile, and test sample specifications.
  - At HRS Exec Team's request, the SRO Tech Team assessed the feasibility of using ArcGIS Survey123 for collecting GPS coordinates during in-home interviews. Based on the findings, CMT approval was requested for use in HRS 2026 data collection. Blaise specifications for survey integration were sent to HRS staff, and the phone application was developed.
  - Data managers compiled 2026 sample estimates from the SRO sample management system to inform staffing and interviewer recruitment planning.

Special Issues

Cost as of Oct 16, 2025	Total Cost to Date (direct + indirect):	129,222.66
	Est Cost at Completion (E\$AC):	20,987,047.97
	Total Budget:	20,986,113.00
	Variance (Total Budget minus- E\$AC):	-934.97
	Reason for Variance:	Minimal variance. Currently projecting to budget.
Projections as of Oct 16, 2025	Dollars Projected for Month:	122,508.68
	Actual Dollars Used:	76,370.49
	Variance (Projected minus Actual):	46,138.19
	Reason for Variance:	Variance was due to initial projections still being in process when September CRS closed.

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

Other Measures

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 Investigator/Clients	David R. Weir (UM-SRC-HRS) 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 End:  Staffing Complete: 07/15/2025  SS Train Start: 08/04/2025  DC Start: 08/11/2025  Pretest Start:  Recruitment Start: 05/12/2025  GIT Start:  SS Train End: 08/04/2025  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		

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

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<b>Report Period</b>	Sep, 2025 (HRS MGX)	Implementing
<b>Risk Level</b>	On Track	
<b>Monthly Updates</b>	<p>Production has been going well. We've been above goals on hours, attempts, and completes. 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. Both of those are currently the week of 2025-12-21.</p> <p>The web endgame is close to being launched. It should be launched prior to the end of October.</p>	

<b>Special Issues</b>		
<b>Cost as of Oct 16, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	660,536.72
	<b>Est Cost at Completion (E\$AC):</b>	2,770,875.00
	<b>Total Budget:</b>	2,793,370.00
	<b>Variance (Total Budget minus- E\$AC):</b>	22,495.00
	<b>Reason for Variance:</b>	Projecting a slight underrun. We will continue to monitor and discuss what, if anything, the Pls might was to use those funds for.
<b>Projections as of Oct 16, 2025</b>	<b>Dollars Projected for Month:</b>	361,645.94
	<b>Actual Dollars Used:</b>	383,082.34
	<b>Variance (Projected minus Actual):</b>	-21,436.40
	<b>Reason for Variance:</b>	The overrun was largely due to interviewing and travel. This was the first month of production of having the full team and adjusting for the data collection period.. The projections have been adjusted accordingly.

Measures		Units at Complete	RR	HPI
	<b>Current Goal:</b>	1,734	30%	12
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>	989	18.0%	9.95
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			

<b>Other Measures</b>
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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: 0.00	Indirect Budget: 0.00	Total Budget: 0.00
Principal	David Weir (SRC)		
Investigator/Clients	Jaqui Smith (SRC)		
Funding Agency	NIH		
IRB	HUM#: HUM00106904		Period of Approval: 9/29/2023-9/28/2024
Project Team	<b>Project Lead:</b> Gary Hein <b>Budget Analyst:</b> Cindy Tsao <b>Production Manager:</b> Ruth B Philippou <b>Senior Project Advisor:</b> Evanthia Leissou <b>Production Manager 1:</b> <b>Production Manager 2:</b> Ruth B Philippou		
Proposal #	no data		
Description	<p>The HRS Life History Mail Survey (LHMS) is part of the Health and Retirement Study. The goal of LHMS is to collect retrospective life histories of HRS participants to address multidisciplinary need for information about events, residential location, and education over the entire life course. Information like this allows researchers to understand how individuals' pasts shape their health and economic situations today.</p> <p>A paper questionnaire will be mailed to a sample of approximately 4,601 HRS Respondents. From this sample, approximately 2,485 completed surveys are expected (54% response rate). For the reminder protocol, 272 respondents have been designated to receive a reminder by postcard. The remaining 4,329 respondents will receive reminders by phone to complete the questionnaire. When a respondent is reached by phone, SRO will attempt to complete the 60-minute interview by telephone. Thank you postcards will be mailed to respondents who return a completed questionnaire.</p>		
SRO Project Period	09/2023 - 04/2024		
Data Col Period	10/2023 - 02/2024		
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b> 09/01/2023   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> 10/05/2023 </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> 02/29/2024 </div> </div>		
Other Project Team Members	Gary Hein: Project Lead Cindy Tsao: Budget Analyst Ruth Philippou: Production Manager Vanessa Clarke: Project Assistant Carolyn Viera Martinez: Coding Lead		
Other Project Name	LHMS Fall		
Sample Mgmt System	SMS		
Data Col Tool	SAQ; Other (Blaise SMS)		
Hardware	Desktop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Check, prepaid (\$25)		
Payment Method	Check through STrak RPay System		
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Report Period	Sep, 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 Oct 19, 2025	<b>Total Cost to Date (direct + indirect):</b>			-69,956.37
	<b>Est Cost at Completion (E\$AC):</b>			-69,956.37
	<b>Total Budget:</b>			0.00
	<b>Variance (Total Budget minus- E\$AC):</b>			69,956.37
	<b>Reason for Variance:</b>			Staffing for reminder calling did not meet original projections and lower response rates than anticipated are resulting in lower costs across the project.
Projections as of Oct 19, 2025	<b>Dollars Projected for Month:</b>			0.00
	<b>Actual Dollars Used:</b>			0.00
	<b>Variance (Projected minus Actual):</b>			0.00
	<b>Reason for Variance:</b>			N/a
Measures		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>	2063	54%	N/A
	<b>Goal at Completion:</b>	2063	54%	N/A
	<b>Current Actual:</b>	671	17%	N/A
	<b>Estimate at Complete:</b>	671	17%	N/A
	<b>Variance:</b>	1392	37%	N/A
Other Measures	N/A			

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

<b>Special Issues</b>	Finance wants to bill current/future fall activities to the spring shortcode			
<b>Cost as of Oct 16, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	248,660.54		
	<b>Est Cost at Completion (E\$AC):</b>	258,454.00		
	<b>Total Budget:</b>	457,922.00		
	<b>Variance (Total Budget minus- E\$AC):</b>	199,468.00		
	<b>Reason for Variance:</b>	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.		
<b>Projections as of Oct 16, 2025</b>	<b>Dollars Projected for Month:</b>	2,968.40		
	<b>Actual Dollars Used:</b>	4,573.42		
	<b>Variance (Projected minus Actual):</b>	-1,605.02		
	<b>Reason for Variance:</b>	Expected coding hours did not hit.		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>	1053	54%	N/A
	<b>Goal at Completion:</b>	1053	54%	N/A
	<b>Current Actual:</b>	358	18%	N/A
	<b>Estimate at Complete:</b>	358	18%	N/A
	<b>Variance:</b>	695	36%	N/A
<b>Other Measures</b>	N/A			

Project Name	(LHMS 2025 Spring) Life History Mail Study Spring 2025 (On Track)		
Project Mode	Primary: Mail	Secondary: Web	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 358,193.00	Indirect Budget: 200,588.00	Total Budget: 558,781.00
Principal	David Weir (SRC)		
Investigator/Clients	Jacqui Smith (SRC)		
	Brady West (SRC)		
Funding Agency	NIH		
IRB	HUM#: HUM00246463	Period of Approval: 5/28/2025-5/27/2026	
Project Team	Project Lead: Gary Hein		
	Budget Analyst: Cindy Tsao		
	Production Manager:		
	Senior Project Advisor: Evanthia Leissou		
	Production Manager 1: Chelsea Graham		
	Production Manager 2:		
Proposal #	no data		
Description	<p>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.</p> <p>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.</p>		
SRO Project Period	03/2025 - 12/2025		
Data Col Period	06/2025 - 09/2025		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 03/01/2025  Pretest End:  Staffing Complete:  SS Train Start:  DC Start: 07/10/2025 </div> <div> Pretest Start:  Recruitment Start:  GIT Start:  SS Train End:  DC End: 10/02/2025 </div> </div>		
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		
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Report Period	Sep, 2025 (LHMS 2025 Spring)		Implementing
Risk Level	On Track		

## Monthly Updates

LHMS 2025 Spring Activities for September:

- 1- Technical development (meetings/programming/testing/reporting) for Pen/Paper SAQ (Weblog/Webtrak) and Web (WSMS, Blaise, Web Portal) 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- 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 Oct 16, 2025	Total Cost to Date (direct + indirect):		418,582.81	
	Est Cost at Completion (E\$AC):		496,921.45	
	Total Budget:		558,781.00	
	Variance (Total Budget minus- E\$AC):		61,859.55	
	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 Oct 16, 2025	Dollars Projected for Month:		97,561.65	
	Actual Dollars Used:		109,605.23	
	Variance (Projected minus Actual):		-12,043.58	
	Reason for Variance:	SSA hours from July through August were all added to this month. SSI hours were higher than projected.		
Measures		Units at Complete	RR	HPI
	Current Goal:	1658	44%	N/A
	Goal at Completion:	1658	44%	N/A
	Current Actual:	999	27%	N/A
	Estimate at Complete:	1080	29%	N/A
	Variance:	521	15%	N/A
Other Measures				

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

<b>Report Period</b>	Sep, 2025 (MTF Base Year 2022_27)	Implementing
<b>Risk Level</b>	On Track	
<b>Monthly Updates</b>	<p>September 2025</p> <p>FTF school recruitment</p> <p>Four interviewers have been working through their assigned schools (~5/6 each). they are responsible for gaining the Principals approval to participate in MTF next year (2026 wave). Additional schools that did participate last year have since been assigned. Once again, this year, nvolved in this work are achieving a slighter higher 'approval' rate than the MTF Recruiters (all TEL/email contacts). As of 10/16, we heard that school recruitment, generally, is at the lowest level ever. The MTF team have asked for help to improve this.</p> <p>We have also begun planning for the MTF 2026 wave - training dates are set, reviewed debrief notes and te staffing list is almost final (we will have two new TLs this year and around a third of the interviewers assigned did not work on MTF last wave).</p>	

#### Special Issues

<b>Cost as of Oct 16, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	4,497,789.73
	<b>Est Cost at Completion (E\$AC):</b>	7,073,538.30
	<b>Total Budget:</b>	9,778,060.00
	<b>Variance (Total Budget minus- E\$AC):</b>	2,704,521.70
	<b>Reason for Variance:</b>	<p>Projections for Funding period 2022 – 2027 (latest client report has been uploaded to MPR)</p> <p>Current projections result in an under spend for the five year grant period. The projected costs are based on completion of 325 schools in years 2024 – 2027 (we were projecting costs for 400 schools) and all in-person. Illume charges have been removed from projections from 2024 onwards. A portion of the hours for work involved in transitioning MTF surveys to Qualtrics are being charged to the Illume recharge account.</p> <p>Primary reason for the under spend and plans for SRO funding: Projections for the five year period are based on current scope of work and the adapted protocol (introduced in 2021). The budget prepared for the proposal was based on the pre-pandemic design. The adapted protocol brings savings in the following categories: interviewer hours, travel, shipping and staff time (specifically hours required for loading and preparing tablets for shipping). For the past few years the number of schools recruited and passed to SRO has been lower than the number used for this budget (n=390).</p> <p>In response, MTF (SRC) have reduced our funding for the first two years. We have received (from MTF) \$1,843,080 (Y1) and \$1,143,890 (Y2) a total reduction of \$815,581. Going forward, the current plan is to fund Year 3 and 4 based on the budgeted amount - if there is significant underspending MTF will reduce SRO's Year 5 award. SRO Finance group feels that we should continue to report/monitor using the original budgeted amount because this is not an official reduction in budget. We are keeping the client (via Nick Prieur) informed of actual and projected spend through a monthly cost report.</p>

<b>Projections as of Oct 16, 2025</b>	<b>Dollars Projected for Month:</b>	43,723.89
	<b>Actual Dollars Used:</b>	31,372.96
	<b>Variance (Projected minus Actual):</b>	12,350.93
	<b>Reason for Variance:</b>	Variance was a little higher this month - mainly due to the over projection of interviewer hours for the FTF school recruitment effort.

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

#### Other Measures

<b>Project Name</b>	<b>(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)</b>												
<b>Project Mode</b>	Primary: Web												
<b>Project Type</b>	Sponsored Projects												
<b>Budget</b>	<b>Direct Budget:</b> 184,954.00	<b>Indirect Budget:</b> 103,575.00	<b>Total Budget:</b> 288,529.00										
<b>Principal Investigator/Clients</b>	Megan Patrick (ISR, SRC)												
<b>Funding Agency</b>													
<b>IRB</b>	<b>HUM#:</b> 00244359	<b>Period of Approval:</b>											
<b>Project Team</b>	<b>Project Lead:</b> Donnalee Ann Grey-Farquharson												
	<b>Budget Analyst:</b> Dean E Stevens												
	<b>Production Manager:</b>												
	<b>Senior Project Advisor:</b> Rebecca Gatward												
	<b>Production Manager 1:</b> Hongyu Johnson												
	<b>Production Manager 2:</b>												
<b>Proposal #</b>	no data												
<b>Description</b>	<p>MTF Early Panel study is a study that will survey drug use in 9th and 11th graders who were 8th and 10th graders in 2023 wave baseline recruited samples. SRO will launch the 2024 and 2025 Web survey data collections with an estimated sample size of 600 cases for two wave of data collection. Although originally proposed, no reminder calling will be carried out on the early panel sample.</p> <p>This budget assumes an overall SRO involvement period of 20 months commencing in March 2024 with the data collections taking place during a 4-month period (for each wave), beginning in May 2024 (for Wave 1) and May 2025 (for Wave 2).</p> <p>Consent process</p> <ul style="list-style-type: none"> <li>- Parents were mailed a letter with a link to a consent document in Qualtrics.</li> <li>- After receiving parental consent, students were contacted so,</li> <li>- Students on individual schedule, programmed in WebSMS</li> </ul> <p>Data Collection</p> <ul style="list-style-type: none"> <li>- Invitation email</li> <li>- followed by two reminders, 2 weeks apart if needed. Each student was on his/her own schedule based on when parental permission was received.</li> </ul> <p>Plan for Future</p> <ul style="list-style-type: none"> <li>- Two more years of data collection</li> </ul> <table border="0"> <tr> <td>Year Recruited</td><td>Follow-Up</td></tr> <tr> <td>2023</td><td>2024, 2025</td></tr> <tr> <td>2024</td><td>2025, 2026</td></tr> </table>			Year Recruited	Follow-Up	2023	2024, 2025	2024	2025, 2026				
Year Recruited	Follow-Up												
2023	2024, 2025												
2024	2025, 2026												
<b>SRO Project Period</b>	07/2023 - 12/2025												
<b>Data Col Period</b>	04/2024 - 08/2025												
<b>Security Plan</b>	NA												
<b>Milestones</b>	<table border="0"> <tr> <td><b>Pre Production Start:</b></td><td><b>Pretest Start:</b></td></tr> <tr> <td><b>Pretest End:</b></td><td><b>Recruitment Start:</b></td></tr> <tr> <td><b>Staffing Complete:</b></td><td><b>GIT Start:</b></td></tr> <tr> <td><b>SS Train Start:</b></td><td><b>SS Train End:</b></td></tr> <tr> <td><b>DC Start:</b></td><td><b>DC End:</b></td></tr> </table>			<b>Pre Production Start:</b>	<b>Pretest Start:</b>	<b>Pretest End:</b>	<b>Recruitment Start:</b>	<b>Staffing Complete:</b>	<b>GIT Start:</b>	<b>SS Train Start:</b>	<b>SS Train End:</b>	<b>DC Start:</b>	<b>DC End:</b>
<b>Pre Production Start:</b>	<b>Pretest Start:</b>												
<b>Pretest End:</b>	<b>Recruitment Start:</b>												
<b>Staffing Complete:</b>	<b>GIT Start:</b>												
<b>SS Train Start:</b>	<b>SS Train End:</b>												
<b>DC Start:</b>	<b>DC End:</b>												
<b>Other Project Team Members</b>	Rebecca Gatward (SPA), Donnalee Grey-Farquharson (Lead), Hueichun Peng, Shaowei Sun, Hongyu Johnson, Brad Goodwin, Edward Green												
<b>Other Project Name</b>													
<b>Sample Mgmt System</b>	Web SMS												
<b>Data Col Tool</b>	Other (Qualtrics)												
<b>Hardware</b>	NA												
<b>DE Software</b>	NA												
<b>QC Recording Tool</b>	NA												
<b>Incentive</b>	Yes, R												
<b>Administration</b>	ISR Group (MTF Staff)												

Payment Type	Other (Tango Card)			
Payment Method	Other (Check mailed MTF Staff)			
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Report Period	Sep, 2025 (MTF Early Panel Pilot)		Implementing	
Risk Level	On Track			
Monthly Updates	We are continuing the 2025 data collection period. As of 09/30/2025, 29 students have completed the survey, and 53 parental consents have been received.			
Special Issues				
Cost as of Sep 30, 2025	Total Cost to Date (direct + indirect):		236,441.74	
	Est Cost at Completion (E\$AC):		287,789.20	
	Total Budget:		288,529.00	
	Variance (Total Budget minus- E\$AC):		739.80	
	Reason for Variance:		The underrun has been reduced since August due to close monitoring and adjustments to projected hours.	
Projections as of Sep 30, 2025	Dollars Projected for Month:		13,714.26	
	Actual Dollars Used:		12,429.17	
	Variance (Projected minus Actual):		1,285.09	
	Reason for Variance:		One staff member did not charge full projected hours due to family care time.	
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027 (On Track)		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 2,496,935.00	Indirect Budget: 1,398,282.00	Total Budget: 3,895,217.00
Principal Investigator/Clients	Megan Patrick (UM-SRC)		
Funding Agency			
IRB	HUM#: 00217920		Period of Approval:
Project Team	<b>Project Lead:</b> Donnalee Ann Grey-Farquharson <b>Budget Analyst:</b> Dean E Stevens <b>Production Manager:</b> Lloyd Fate Hemingway <b>Senior Project Advisor:</b> Rebecca Gatward <b>Production Manager 1:</b> <b>Production Manager 2:</b> Hongyu Johnson		
Proposal #	no data		
Description	<p>Since 1975 the MTF survey has measured drug and alcohol use and related attitudes among adolescent students nationwide. A nationally representative sample of survey participants report their drug use behaviors across three time periods: lifetime, past year, and past month. The survey is funded by the NIDA, a component of the National Institutes of Health (NIH), and conducted by the University of Michigan. MTF has two linked projects, MTF Main surveys students in schools, and MTF Panel surveys adults across the lifespan.</p> <p>MTF Panel conducts data collection between April and October each year. In 2024 MTF moved from DatStat.Illume web surveys to Qualtrics. We also use WebSMS, RLM, LabSMS and Blaise for the project. Each year over 20,000 participants are invited to complete a survey with push-to-web followed by paper survey modes. Invitations are mailed in April. Non-response calling begins in May and runs through August. Several hard copy and email reminders are sent throughout the data collection window. Both the separately funded Winter Location calling effort and Non-Response follow-up calling will be integrated with the standard MTF activities.</p> <p>During 2024 data collection wave, we have 10 survey forms that was reduced from 12 from the previous year.</p> <p>Panel participants are sent study newsletters each year in December. Participants whose newsletter is returned undeliverable by the USPS are sent for location calling Mid-January through February. We are planning to use Respondent Website to delivery newsletter electronically with the functionality of collecting respondent's contact information.</p>		
SRO Project Period	01/2022 - 03/2027		
Data Col Period	04/2022 - 10/2026		
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
Other Project Team Members	Rebecca Gatward (SPA), Donnalee Grey-Farquharson, Lloyd Hemingway, Dave Dybicki, Max Malholtra, Hueichun Peng, Shaowei Sun, Peter Sparks, Ashwin Dey, Hongyu Johnson, Brad Goodwin, Edward Green.		
Other Project Name	MTF		
Sample Mgmt System	Web SMS		
Data Col Tool	Other (Qualtrics)		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	ISR Group (MTF Staff)		
Payment Type	Check, prepaid; Check, post		
Payment Method	Other (MTF Staff mails check)		
<div></div>			

<b>Report Period</b>	Sep, 2025 (MTF Panel 2022-27)			Implementing
<b>Risk Level</b>	On Track			
<b>Monthly Updates</b>	We continue to make progress on NR calling and panel data collection. The MTF Regular panel currently includes 18,207 sample cases, which accounts for 120 cases reinstated after several years of non-participation. A total of 8 replicas were released on staggered schedules. As of 9/30/2025, there are 9,317 completed cases (RR: 51.15%), a higher rate than at the same point in previous waves of data collection.			
<b>Special Issues</b>				
<b>Cost as of Sep 30, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>			2,793,977.84
	<b>Est Cost at Completion (E\$AC):</b>			3,959,521.44
	<b>Total Budget:</b>			3,895,217.00
	<b>Variance (Total Budget minus- E\$AC):</b>			-63,304.44
	<b>Reason for Variance:</b>			We are continuing to implement necessary adjustments and minimize overruns during the data collection period.
<b>Projections as of Sep 30, 2025</b>	<b>Dollars Projected for Month:</b>			51,092.48
	<b>Actual Dollars Used:</b>			33,823.21
	<b>Variance (Projected minus Actual):</b>			17,269.27
	<b>Reason for Variance:</b>			In September, Survey Tech II used more hours than estimated on the NRC project.
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
<b>Other Measures</b>				

Project Name	(NDWS) National Dementia Workforce Study (On Track)		
Project Mode	Primary: Not Available		
Project Type	Sponsored Projects		
Budget	Direct Budget: 4,327,548.00	Indirect Budget: 2,423,425.00	Total Budget: 6,750,973.00
Principal	Donovan Maust (Michigan Medicine)		
Investigator/Clients	Joanne Spetz (University of California, San Francisco)		
	James Wagner (University of Michigan - Survey Research Center)		
Funding Agency	NIA		
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Piotr Dworak		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Dedra Campbell		
	Production Manager 2: Lisa S Holland		
Proposal #	no data		
Description	<p>The National Dementia Workforce Study (NDWS) will be launched by a national team of experts in clinical care of persons living with dementia, survey research, and health workforce research. The goal of the NDWS data infrastructure is to allow researchers and policymakers to ask and answer scientific questions to help build the workforce of clinicians and other professional care providers required by the growing population of persons living with dementia in the U.S. The Core of NDWS will be four surveys that reflect key elements of the professional dementia care workforce in the U.S.: Community Clinicians, Nursing Home Staff, Home Care Staff, and Assisted Living Staff. In addition to these surveys, the NDWS team will develop a variety of additional data sources that can be linked with the surveys in order to maximize the scientific potential of the surveys. The project's activities will be conducted through five Cores: 1) Administrative; 2) Screening and Survey Instrument; 3) Administrative Data Transfer, Masking, Access, and Ethics; 4) Data Collection, Linkages, Cleaning, and Sharing; and 5) Research Studies. The overall aims are to: 1) Launch a family of four nationally representative professional dementia workforce surveys covering the key care delivery settings in the U.S.; 2) Through the National Dementia Workforce Study, build a data infrastructure surrounding the dementia workforce surveys that allows researchers to generate critical insights into the professional dementia care workforce and associated outcomes for PLWD; and 3) Develop and expand the community of researchers focused on the professional dementia care workforce overall and that use the National Dementia Workforce Study data infrastructure.</p> <p>SRO's work is associate with Cores 2 and 4.</p>		
SRO Project Period	10/2023 - 09/2028		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Lisa Holland, Raphael Nishimura, Ji Qi, AB Fuqua-Smith, Liliana Grueber, Jackson Collier, Margaret Hudson (until Jan 2025)		
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
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<b>Report Period</b>	Sep, 2025 (NDWS)	Implementing
<b>Risk Level</b>	On Track	
<b>Monthly Updates</b>	<p>September/October activities:</p> <p>* Related to Wave 1 (data collection concluded in April 2025): 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.</p> <p>* Related to Wave 2 (May - December 2025): RTI recruitment is 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 underway and data collection for Direct Home Care Workers Pilot (a new sample type) launched in early September following IRB approval.</p> <p>SRO assistance on Wave 2 is focused on reviewing data collection progress, preparing Wave 2 PI reports, and review of paradata.</p> <p>SRO is also overseeing the Community Clinicians Non-Response Follow Up experiment. On August 12, CCs were randomized into 4 groups to receive shorter (15 min) and longer (25 min) survey and PAPI or no-PAPI. So far the results are not pointing to any significant findings.</p> <p>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 12/02, assuming survey offline 12/19/2025.</p> <p>Below are the latest recruitment details (to date):</p> <p>RTI:</p> <p>Assisted Living: Out of 1000 agencies, 131 completed admin surveys, 77 rosters were delivered, 1930 staff rostered, 1257 were selected and 614 staff surveys completed (48.9% completion rate).</p> <p>Nursing Homes: Out of 1000 agencies, 144 completed admin surveys, 85 rosters were delivered, 5078 staff rostered, 2389 were selected and 1054 staff surveys completed (44.4% completion rate).</p> <p>Community Clinicians: Out of 19,904, 19,523 CCs have been invited with 1875 completions (9.4% completion rate).</p> <p>RTI longitudinal staff follow up (Wave 1 respondents).</p> <p>Assisted Living: Out of 447, 313 surveys have been completed (70.0% completion rate)</p> <p>Nursing Home: Out of 394, 273 surveys have been completed (69.3% completion rate)</p> <p>DLH:</p> <p>Home Care: Out of 300 agencies, 29 completed admin surveys, 134 staff rostered, 74 staff sampled and 27 staff surveys completed (36.5% completion rate). For the Direct Care Worker sample, out of 500 workers, 52 completed the survey (10.4% completion rate).</p> <p>*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, defining a new sample of Community Clinicians who focus more on dementia patients, completing the final report based on 25 cognitive interviews completed to assist with W3 instrument design (Clinicians - 5; Staff Sruveys - 16; Administrators - 4). We are also reviewing and updating respondent materials. Our target is to prepare all W3 materials for the IRB submission in November.</p>	
<b>Special Issues</b>		
<b>Cost as of Oct 20, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	1,711,794.31
	<b>Est Cost at Completion (E\$AC):</b>	6,771,101.59
	<b>Total Budget:</b>	6,750,973.00
	<b>Variance (Total Budget minus- E\$AC):</b>	-20,128.59
	<b>Reason for Variance:</b>	NDWS added staff to accommodate additional work expected through end of Year 2 2025 NIA fiscal year (ending in August) and in Year 3 Sep 2025 - Aug 2026. This extra cost will be covered by the carryover request which has been submitted to the Michigan Medicine NDWS Team and is being approved by the U-M OSRP.
<b>Projections as of Oct 20, 2025</b>	<b>Dollars Projected for Month:</b>	164,630.14
	<b>Actual Dollars Used:</b>	108,656.50
	<b>Variance (Projected minus Actual):</b>	55,973.64
	<b>Reason for Variance:</b>	Our monthly underrun increased a small amount due to vacation time, slower start for cognitive interviews and slight over projection for DMS staff.

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

Other Measures

Project Name	(NYCHVS) New York City Housing and Vacancy Survey (On Track)		
Project Mode	Primary: Face to Face		
Project Type	Sponsored Projects		
Budget	Direct Budget: 9,926,188.00	Indirect Budget: 3,573,427.00	Total Budget: 13,499,615.00
Principal Investigator/Clients	Elyzabeth Gaumer, PI (NYC Housing Preservation Dept ) 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	<b>Project Lead:</b> Maureen Joan O'Brien <b>Budget Analyst:</b> Cindy Tsao <b>Production Manager:</b> Theresa Camelo <b>Senior Project Advisor:</b> Stephanie A Chardoul <b>Production Manager 1:</b> Saray Gonzalez <b>Production Manager 2:</b>		
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	<div> <div> <b>Pre Production Start:</b> 01/15/2025  <b>Pretest End:</b>  <b>Staffing Complete:</b> 11/20/2025  <b>SS Train Start:</b> 01/19/2026  <b>DC Start:</b> 02/01/2026           </div> <div> <b>Pretest Start:</b>  <b>Recruitment Start:</b> 10/01/2025  <b>GIT Start:</b> 01/18/2026  <b>SS Train End:</b> 01/29/2026  <b>DC End:</b> 08/31/2026           </div> </div>		
Other Project Team Members			
Other Project Name	New York City Housing and Vacancy Survey		
Sample Mgmt System	MSMS		
Data Col Tool	Blaise 5		
Hardware	Laptop; [UM cell] Phone		
DE Software	N/A		
QC Recording Tool	NA		
Incentive	Not used		
Administration	NA		
Payment Type	N/A		
Payment Method	N/A		
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Report Period	Sep, 2025 (NYCHVS)	Planning	
Risk Level	On Track		
Monthly Updates	Sampling: HPD delivered a new PAD file on 15, but some required information was missing. Once that is delivered, DMSS will select sample and send to MSG. We expect a sample file from MSG at the start of November. Then, HPD and SRO will need to do some QC on the file. First, DMSS will review for discrepancies between the PAD file and the sample file. For buildings with drop points (mail carrier drops all mail in central location of the building, no unit numbers are available), SRO staff will possibly perform Accurint searches in order to identify the unit numbering		

schema in each building. We will know the number of units in the building. We are testing this now. SRO staff may also perform internet searches to identify unit numbering schema. HPD has strategies as well, including other administrative data files and going out into the field to determine unit numbering schema in-person. With this QC's file, DMSS could make random selections from the drop-point buildings. There may be additional QC needed on buildings in which the unit numbers in the MSG file and the PAD file do not match.

#### Recruitment & Hiring:

The Iwer posting for NHs was opened on Sept 5. Screening and MBI's are underway. HPD and CUNY have met and have determined a protocol for passing candidates to U-M. HPD has a staff person who will assist in the screening. HPD has not forwarded any candidates from CUNY to date (10/20/2025). This staff person will enter candidates into the Applicant Tracking System (ATS) for SRO. Thus far, 33 candidates have passed the background checks. A total of 80 candidates are in some process of being hired. 7 people are currently pending offers. We continue to work with RSS for bilingual certifications, although the process of managing candidates has not been smooth. This is the first time RSS has certified Iwers. They work with bilingual contractors whose schedules who have limited availability. SRO is exploring other vendors for bilingual certification needs for other projects and possible future waves.

#### Training:

Iwer training will be held in Jan, 2026 in NYC. There will be two trainings, back-to-back at about 4 days each. Iwers will travel to the training daily. Part of GIT and some core training sessions will be held via Zoom 'live' sessions to minimize the number of days in person. We are developing training content. 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. Project clothing will be provided to Iwers at Registration. Clothing and laptop bags will be ordered by HPD and include both the HPD and a U-M logo.

Training materials are and sessions are being finalized. There is a review process between HPD and SRO that is time consuming, as this is the first wave SRO has conducted the NYCHVS training. Systems and protocols are different from previous waves, terminology is different, etc.

#### Blaise:

HPD was due to deliver updated specs based on answers to Q&A from original specs, on 9/8/2025. They were not delivered until 10/10/2025, and included major updates including 97 new items and 67 logic/flow changes. We worked with HPD to compromise on these requests as these changes would have put us well past the freeze date of 12/2/2025. HPD has completed their first round of language testing. They are currently translating the new spec updates and are using the xliiff tool. There is always a risk of Blaise causing timeline issues due to the complexity of the languages, needing to all launch at once, and HPD requested non-English keyboards for Iwers use so they would not have to translate open-ends back to English when typing in responses. The team is exploring this to assess scope, and will likely implement.

#### MSMS:

MSMS development is underway. The initial development of specs are done and were submitted on October 8. Development of the system is close to being done, and config testing should begin within the next couple of days. Integration testing should start the week of 10/27, provided we have a Blaise instrument to use. The instrument does not need to be final, so that should be fine. TSG has confirmed that they will develop a unique MSMS system for NYCHVS use. It will not have all of the updates of MSMS 2.0, but will meet all of the security requirements for the project. This both allows TSG the time to complete 2.0, the NYCHVS timeline to stay on track and meet security requirements. NYCHVS will have its own server so that NYCHVS production does not interrupt other projects, and vice versa. This will be MSMS' first project and will have many users.

#### Other Technical Updates:

The Pls have proposed adding administrative utility use data collection for addresses that are interviewed from a single data source through the state of New York. HPD is considering this as a Pilot for future waves of utility data collection. There would be a short consent at the utility section in Blaise, where the R could select to either answer the utility questions or give permission for the state to provide their utility information. Approximately 500-1,000 will be selected for this pilot. In addition to the consent, there would be a state form that would need to be completed. This would be likely be an edu form. SRO has proposed continuing to work on a plan for implementation, but launch after data collection starts. Reasons include, a. Critical pieces of the plan are still undetermined, b. We are unsure if an edu for a consent form would meet the project security requirements, c. Delaying the start would allow the tech team to prioritize systems and instrument development that is within scope, d. This utility pilot could exclude the project from 'exempt' IRB status. The Pls are in favor of this plan.

QC: We are discussing and 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 U-M resources.

#### Other:

The IRB application was submitted on 9/22, and we have sought exempt status.

**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 interview 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.

<b>Cost as of Oct 08, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	577,000.24
	<b>Est Cost at Completion (E\$AC):</b>	13,233,189.92
	<b>Total Budget:</b>	13,499,615.00
	<b>Variance (Total Budget minus- E\$AC):</b>	266,425.08
	<b>Reason for Variance:</b>	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.

<b>Projections as of Oct 08, 2025</b>	<b>Dollars Projected for Month:</b>	338,953.78
	<b>Actual Dollars Used:</b>	204,911.78
	<b>Variance (Projected minus Actual):</b>	134,042.00
	<b>Reason for Variance:</b>	Non-salary costs did not hit. Moved projections forward.

<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>	10,650	71%	9.0
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>		71%	
	<b>Variance:</b>			

**Other Measures**

Project Name	(PR-PSID) Puerto Rico Panel Study of Income Dynamics (Some Concerns)		
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 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 End: 03/11/2024 Staffing Complete: SS Train Start: 01/31/2024 DC Start:		Pretest Start: 02/05/2024 Recruitment Start: GIT Start: 01/30/2024 SS Train End: 02/02/2024 DC End:
Other Project Team Members	Shonda Kruger-Ndiaye & Camila Kendall -- Co-Project Leads Raphael Nishimura -- Sampling Tech Team: Marsha Skoman (Tech Lead & STrak Programmer), Jude Purillo (Lead Blaise Programmer), Kelly Lieske (Programming Support), Valyn Dall (Data Manager), Jennie Williams (Data Management Support), Emmanuel Ellis (Help Desk), Cheng Zhou (Database setup), Lihshwu Ke (Database set up) Spanish Testing and Project Support: Liliana Grueber		
Other Project Name			
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop		
DE Software	N/A		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	Other (ETI (Puerto Rican Survey Firm))		
Payment Type	Check, post (Varies by study phase); Cash, post (Varies by study phase)		
Payment Method	Other (Via ETI Systems)		
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Report Period	Sep, 2025 (PR-PSID)		Planning
Risk Level	Some Concerns		
Monthly Updates	PI team is working with the program officer to designate Beth Fussel (Brown University) as the PI, and Stephanie Chardoul as the U-M Internal PI. Naravan will still consult with Beth. With this new arrangement, SRO has taken		

over the PSID budgets, which included the ETI budget.

SRO requested that ETI provide a revised budget estimate based on revised assumptions (the impact of the pause in production after training, and data collection extending through March). ETI's new budget increased cost to complete by ~\$146K.

SRO prepared for the remote training that scheduled for 9/30-10/3 -- minor updates were made to the tech systems (corrections of bugs found during training, new email/text templates) and the training materials. SRO coordinated with ETI's tech contractor to add Splunk to the laptops and download the updated training files.

ETI prepared the advance mailing materials. Advance mailing will be sent out in early October. ETI will provide SRO with the sample assignments for replicate one by 10/1. ETI purchased DRI equipment and Blaise licenses.

Special Issues	Projected overrun.			
Cost as of Sep 17, 2025	Total Cost to Date (direct + indirect):			1,165,755.42
	Est Cost at Completion (E\$AC):			3,220,139.93
	Total Budget:			3,023,308.00
	Variance (Total Budget minus- E\$AC):			-196,831.93
	Reason for Variance:			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. Mgt are meeting with the financial analyst and PIs to discuss next steps to lower the projected overrun.
Projections as of Sep 17, 2025	Dollars Projected for Month:			18,146.99
	Actual Dollars Used:			73,937.74
	Variance (Projected minus Actual):			55,790.75
	Reason for Variance:			Costs that were charged to the RSF budget in June and had to be moved back to the PR budget hit in Sept. The total direct costs for September on both accounts is \$12,014 vs. project costs of \$18,147, a variance of \$6,133.
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(PSID CDS23 Phase 2) PSID Childhood Development Supplement 2023 Phase 2 (On Track)		
Project Mode	Primary: Mixed      Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	Direct Budget: 1,618,383.00	Indirect Budget: 906,295.00	Total Budget: 2,524,678.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#: HUM00166316	Period of Approval:	
Project Team	<b>Project Lead:</b> Camila Kendall <b>Budget Analyst:</b> Ivanna Iavorska-Em <b>Production Manager:</b> Sarah Crane <b>Senior Project Advisor:</b> Stephanie A Chardoul <b>Production Manager 1:</b> Barbara Aghababian-Homburg <b>Production Manager 2:</b> Carolyn Vieira-Martinez		
Proposal #	no data		
Description	Primary Caregivers (PCG) with children aged 5+, who completed Phase 1 of CDS (the phone interview) will be invited to provide a saliva sample during phase 2. The SSL will assemble kit mailings that will be shipped to respondents in weekly releases. Field interviewers will follow up via phone, email, and text to encourage participation. Additionally, Field IWERs will make FTF visits to pick up saliva samples, and offer cash payments.		
SRO Project Period	06/2024 - 02/2025		
Data Col Period	09/2024 - 01/2025		
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
Other Project Team Members	Project Lead -- Camila Kendall Field Production Management -- Sarah Crane & Barb Aghababian-Homburg SSL Production Management Lead (Assembly & Logging) -- Carolyn Vierra-Martinez SSL Production Management Support (Assembly & Logging) -- Ian Woods Project Management Support -- Xiomara Lorenzo-Guerra, Nahid Sultana Tech Lead -- Jeff Smith PDMG Tech Lead -- Ian Ogden		
Other Project Name	CDS Saliva Collection		
Sample Mgmt System	SurveyTrak		
Data Col Tool	NA		
Hardware	Laptop; [UM cell] Phone		
DE Software	NA		
QC Recording Tool	N/A		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
=====			
Report Period	Sep, 2025 (PSID CDS23 Phase 2)		Closing
Risk Level	On Track		
Monthly Updates	SRO corrected WebLog data based on BSL validity results per PI request, and updated bug found in reports.  Last week, PIs requested that SRO review invalid consent forms to categorize them for the PI team. Worked with the financial analyst to come up with a cost estimate (~\$1.7K). Confirmed that SSL production manager is available to help with this task in November.		
Special Issues			

<b>Cost as of Oct 16, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	1,447,999.32
	<b>Est Cost at Completion (E\$AC):</b>	1,447,999.32
	<b>Total Budget:</b>	2,524,678.00
	<b>Variance (Total Budget minus- E\$AC):</b>	1,076,678.68
	<b>Reason for Variance:</b>	Expected September to be the final cost report. Will add minimal projections in Oct & Nov if PIs approve cost estimate.

<b>Projections as of Oct 16, 2025</b>	<b>Dollars Projected for Month:</b>	1,042.63
	<b>Actual Dollars Used:</b>	2,174.03
	<b>Variance (Projected minus Actual):</b>	-1,131.40
	<b>Reason for Variance:</b>	Actuals for Mgt to correct Weblog data per PI request were slightly higher than projected.

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

Other Measures

Project Name	(PSID 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	<b>Project Lead:</b> Elizabeth Ohryn <b>Budget Analyst:</b> William Lokers <b>Production Manager:</b> William Keating <b>Senior Project Advisor:</b> Stephanie A Chardoul <b>Production Manager 1:</b> Daric Thorne <b>Production Manager 2:</b> Lisa J Carn		
Proposal #	no data		
Description	<p>TAS 2025 is the 11th Wave of TAS study, part of the PSID Suite of projects.</p> <p>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.</p>		
SRO Project Period	07/2025 - 08/2026		
Data Col Period	11/2024 - 05/2026		
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b> 07/03/2025  <b>Pretest End:</b>  <b>Staffing Complete:</b> 08/13/2025  <b>SS Train Start:</b> 10/27/2025  <b>DC Start:</b> 10/28/2025             </div> <div> <b>Pretest Start:</b>  <b>Recruitment Start:</b> 07/25/2025  <b>GIT Start:</b>  <b>SS Train End:</b> 10/30/2025  <b>DC End:</b> 06/14/2026             </div> </div>		
Other Project Team Members	PSID Suite SRO Lead - Shonda Kruger-Ndiaye; Data Manager - Brad Goodwin; 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)		
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Report Period	Sep, 2025 (PSID TAS 2025)		Planning
Risk Level	On Track		
Monthly Updates	Summary of September 2025 Activities  Staffing: Recruitment of 13 total SSL STs took place, which includes 1 TLC, 5 TLs, 2 Locators and 5 interviewers. Another staffing will occur before the end of the year for a January 2026 training.		

## Management

### 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.

### Data Collection Prep

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.

### RND Results:

Total cases submitted 1981

No (no change to cell number) 1920 (97%)

Yes (changed cell number) 61 (3%)

### Prelocating

Focusing on cases without a cell and email (n = 295).

Received 45 CP replies with updated R contact information via Qualtrics survey.

Locators have begun completing database searches. Obtained 77 cases so far. Will begin calling to confirm leads once production begins.

The Pls 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.

### Staffing

## Special Issues

<b>Cost as of Oct 16, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	163,100.99
	<b>Est Cost at Completion (E\$AC):</b>	1,277,733.64
	<b>Total Budget:</b>	1,277,930.00
	<b>Variance (Total Budget minus- E\$AC):</b>	196.36
	<b>Reason for Variance:</b>	There is currently no expected over or underrun.
<b>Projections as of Oct 16, 2025</b>	<b>Dollars Projected for Month:</b>	91,671.80
	<b>Actual Dollars Used:</b>	79,745.47
	<b>Variance (Projected minus Actual):</b>	11,926.33
	<b>Reason for Variance:</b>	Technical costs were lower than anticipated due to programming delays.

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

## Other Measures

Project Name	(PSID25) Panel Study of Income Dynamics Core 2025 (On Track)		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 5,003,388.00	Indirect Budget: 2,801,897.00	Total Budget: 7,805,285.00
Principal Investigator/Clients	Tom Crossley (UM-SRC-PSID) Esther Friedman (UM-SRC-PSID) Narayan Sastry (UM-SRC-PSID)		
Funding Agency	NSF, NIA, NICHD		
IRB	HUM#: HUM00062417	Period of Approval:	
Project Team	Project Lead: Rachel Anne Orlowski		
	Budget Analyst: 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	<p>The Panel Study of Income Dynamics (PSID--also known to Respondents as the Family Economics Study or FES) is a longitudinal survey of several thousand individuals and their families, carried out since 1968 and conducted every two years. The sample is comprised of respondents from the 4,800 original families as well as new (immigrant) sample added in 1997/1999 and 2017/2019. The total 2025 sample size will be approx. 11,200, with approx. 10,000 completed interviews expected. Most of the information collected is about family composition and changes (marriages, divorces, births, deaths, people moving in and out); income sources and amounts; employment and pensions; and wealth. There are also questions about housing; education; vehicles; health; fertility; COVID-19; and money spent on food, healthcare, and school. The main focus is on how these family composition and financial factors interact with each other and how they change over time. The survey will be administered via web and telephone, with the expectation that more surveys will be completed via web than telephone.</p> <p>Talk about ancillary studies here.</p> <p>The 2023 waves of CDS and the Transition into Adulthood (TAS) will follow PSID Core data collection. CDS and TAS eligibility is dependent upon completion of PSID Core.</p>		
SRO Project Period	03/2024 - 09/2026		
Data Col Period	03/2025 - 12/2025		
Security Plan	NA		
Milestones	<div><div><div>Pre Production Start: 03/01/2024</div><div>Pretest End: 10/06/2024</div><div>Staffing Complete:</div><div>SS Train Start: 02/24/2025</div><div>DC Start: 03/10/2025</div></div><div><div>Pretest Start: 09/16/2024</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End: 06/10/2025</div><div>DC End: 12/31/2025</div></div></div>		
Other Project Team Members	TSG Tech Leads - Jim Rodgers, Jeff Smith, & Karl Dinkelmann; Data Manager - Brad Goodwin & Ed Green; 68ID Site Programmer - Ashwin Dey & Holly Ackerman; Blaise Programmer - Jude Perillo; MSMS Programmers - Pam Swanson, Darnell Christian, & Holly Ackerman; Tech Support - David Bolt & Kyle Goodman; Tech Design/Testing - Sarah Broumand & Jaime Koopman; Production Support: Lorraine Bird; Project Support: Saujanya Acharya, Janet McBride, & Xiomara Lorenzo-Guerra; Reporting, Mapping, & Sample Assignment: Ji Qi, Minako Edgar, Saujanya Acharya, & Wen Chang		
Other Project Name	FES, Family Economic Study, PSID Core 2025		
Sample Mgmt System	MSMS; Project specific system (68ID Site)		
Data Col Tool	Blaise 5		
Hardware	Laptop; [UM cell] Phone		
DE Software	N/A		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, Other (Locator, Proxy)		
Administration	ISR Group (PSID)		
Payment Type	Check, post (Varies); Cash, post (Varies); Other (electronic, post--JP Morgan)		
Payment Method	Check through other system (PSID will handle check & e-payment via RAPS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (PSID will handle check & e-payment via RAPS)		

Report Period	Sep, 2025 (PSID25)	Implementing		
Risk Level	On Track			
Monthly Updates	Summary of September Activities:  Tech: MSMS - As the project continues to run in maintenance mode, the team began to shift into thinking ahead to 2027. We began building a development priority list and explored certain concern areas like sync times. A significant issue (dating back to the 2021 wave) was uncovered around how Web cases interacted with Locator 1 and Locator 2 tokens. In PSID, Interviewers can collect information about individuals who provide us details that help locate the R - we call these Locator 1 and 2. Information is entered into the DCA and then pushed into Blaise. These fields are "not on route" for the Web instrument, which we discovered means that the Web instrument was blanking L1 and L2 fields out entirely. The PSID payment process pulls its data from Blaise, which means locators from completed web interviews were not issued their token. We began an immediate process to look into lost 2025 Locator 1/2 information, which Jim and Andrew were able to build an MSMS query for. This was not fully resolved by the end of the month, but significant progress was made.  Blaise - The L1 and L2 issues affected not just MSMS but Blaise. The Blaise setup programmer began to explore ways to correct this issue. This was not resolved fully by the end of the month, but significant progress was made.  Sample Release / Interventions: The Endgame period for English Web Release 2 concluded on 9/3. We achieved a 93.3% Response Rate (Goal was 91%) not including expected partial interviews. The Endgame period for English Web Rel 4 began on 9/2 and will end on 10/15. Eng Web Rel 5 began the Endgame period on 9/24, and it will end on 11/5.  An IRB Amendment containing 1) new Endgame materials for CATI and Splitoff cases, 2) new locator incentive materials, 3) new e-payment materials, 4) updated Medicare consent language, and 5) study team changes was submitted on 9/22.  Staffing: Worked on an IWER consolidation plan. Approximately 50% of the interviewers will be consolidated in late-October.  Other Activities: Occupation and Industry coding began in the SSL in September, with the training on 9/2.			
Special Issues				
Cost as of Oct 14, 2025	Total Cost to Date (direct + indirect):	5,370,811.76		
	Est Cost at Completion (E\$AC):	7,534,018.90		
	Total Budget:	7,805,285.00		
	Variance (Total Budget minus- E\$AC):	271,266.10		
	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. Pls desire to keep the underrun (~\$245K direct). Underrun decreased this month due to reassessment of budgeting/projecting assumptions: 1) Current Iwer II Main Data Collection hours are more than what was previously projected but still less than what was budgeted. 2) Post Collection Processing hours were shifted from contingent SSL staff to permanent SSL staff.		
Projections as of Oct 14, 2025	Dollars Projected for Month:	634,661.89		
	Actual Dollars Used:	602,078.60		
	Variance (Projected minus Actual):	32,583.29		
	Reason for Variance:	\$6K due to CATI recharge that was not billed this month -- projection moved forward to October. Management and Programming actuals were less than projected. Non-sal actuals were lower than projected (printing & postage) -- projections were lowered in future months.		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:	9994	89%	4.73
	Current Actual:	7783	75.67	4.6
	Estimate at Complete:	9146	87%	4.91
	Variance:	848	2%	-0.18
Other Measures	Note: Current actual metrics based on the Dashboard with the week ending on 10/4/25. 'Current goals' will be populated as production goals are finalized. 'Estimated' goals at completion will be updated as production is underway. Currently monitoring 2025 production against the 2023 production curves for comparable sample releases.			



Project Name	(SAFEGUARD) SAFEGUARD (On Track)		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 2,200,868.00	Indirect Budget: 1,232,492.00	Total Budget: 3,433,360.00
Principal	Vincent Capaldi (Uniformed Services University)		
Investigator/Clients	Sarah Maggio (Uniformed Services University)		
Funding Agency	Department of Defense, Office of the Assistant Secretary of Defense for Health Affairs (within DHA), through the Uniformed Services University of the Health Sciences (USUHS)		
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Daniel Tomlin		
	Budget Analyst: William Lokers		
	Production Manager:		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>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:</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p>		
SRO Project Period	01/2025 - 01/2029		
Data Col Period	07/2025 - 11/2028		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 01/06/2025</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start: 10/27/2025</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End:</div></div>		
Other Project Team Members	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

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Report Period	Sep, 2025 (SAFEGUARD)	Planning
Risk Level	On Track	
Monthly Updates	In September, all work was focused on testing and finalizing Blaise instruments. MSMS specifications continued to prepare for testing in October. Specifications were created for follow-ups surveys and programming began. In addition, data testing work ramped up in preparation for Baseline launches in October and November.	

Special Issues		
Cost as of Sep 30, 2025	<b>Total Cost to Date (direct + indirect):</b>	476,342.86
	<b>Est Cost at Completion (E\$AC):</b>	3,297,064.71
	<b>Total Budget:</b>	3,433,360.00
	<b>Variance (Total Budget minus- E\$AC):</b>	136,295.29
	<b>Reason for Variance:</b>	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. MSMS programming hours and project management has been added which has lowered the variance since last month. With SSL resources and added this will decline further.

Projections as of Sep 30, 2025	<b>Dollars Projected for Month:</b>	130,405.89
	<b>Actual Dollars Used:</b>	81,426.00
	<b>Variance (Projected minus Actual):</b>	48,979.89
	<b>Reason for Variance:</b>	Variance is due to programming hours being lower than expected and projected hours for the SSL PM were reduced to a change in the launch date.

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

Other Measures
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Project Name	(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	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Karl Dinklemann (Programmer/Analyst) Kelly Chatain (Archivist) Andrew Piskorowski (BI Analyst) Cheng Zhou (Database Analyst/Programmer) Jennie Williams (General Programmer/Analyst) Deb Seale (SSL Operations Manager) iAn Woods (Coder) Ann Munster (Coder) Nancy Walker (Coder) Lisa Carn (Coder) Peter Sparks (Programmer) Carolyn Vieira-Martinez (Survey Specialist)		
Other Project Name	SCA Web 2025		
Sample Mgmt System	Web SMS		
Data Col Tool	Blaise 5		
Hardware	NA		
DE Software	N/A		
QC Recording Tool	N/A		
Incentive	Not used		
Administration	N/A		
Payment Type	N/A		
Payment Method	N/A		
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Report Period	Sep, 2025 (SCA Web 2025)		Implementing
Risk Level	On Track		
Monthly Updates	During the September 2025 calendar month, SCA coding processed 1,357 cases with an additional 152 cases for IRR (total of 1,124 cases, 10.1% of cases selected for check coding). The number of cases this month is the		

highest total number of cases in the 2025 calendar year.

Overall, coder efficiency in August was 5.2 minutes per case. This represents a slight decrease in efficiency for coding activities, a 0.7 increase from the July calendar month.

#### Special Issues

Cost as of Oct 16, 2025	<b>Total Cost to Date (direct + indirect):</b>	83,731.66
	<b>Est Cost at Completion (E\$AC):</b>	113,911.32
	<b>Total Budget:</b>	136,554.00
	<b>Variance (Total Budget minus- E\$AC):</b>	22,642.68
	<b>Reason for Variance:</b>	Overall the reasons for the project underrun remains the same; less than projected costs for programming/technical support.
Projections as of Oct 16, 2025	<b>Dollars Projected for Month:</b>	10,588.77
	<b>Actual Dollars Used:</b>	10,467.74
	<b>Variance (Projected minus Actual):</b>	121.03
	<b>Reason for Variance:</b>	Costs for September 2025 came in \$121.03 under projections. During the September 2025 month, coding costs came in slightly over projected costs, and programming/technical support came in slightly under projected costs.

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

#### 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 Investigator/Clients	Toni Antonucci (ISR) Kristine Ajrouch (ISR) Laura Zahodne (ISR)		
Funding Agency	NIH		
IRB	HUM#: HUM00187453		Period of Approval: 8/7/2024 - 8/6/2025
Project Team	Project Lead: Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Taghreid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 3400 interviews with respondents aged 35 years or older residing in the tri-county area of Southeast Michigan (Wayne, Oakland and Macomb counties) and 244 interviews with original Social Relations panel sample members aged younger than 65 years of age. The project involves screening up to 6900 new sample lines., with one selected respondent per household. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements (height, weight, blood pressure, grip strength) and saliva collection. The SRS 2023 project will use the same instrument programmed for the D-Amp project, with the only new programming being that for a screener. The screener will be translated into Arabic. No informant or proxy interview is included in the project scope. Interviews will be conducted in English or Arabic.		
SRO Project Period	09/2021 - 05/2023		
Data Col Period	05/2023 - 01/2025		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 09/01/2022</div><div>Pretest End:</div><div>Staffing Complete: 04/10/2023</div><div>SS Train Start: 05/18/2023</div><div>DC Start: 05/30/2023</div></div> <div><div>Pretest Start:</div><div>Recruitment Start: 02/01/2023</div><div>GIT Start: 05/16/2023</div><div>SS Train End: 05/25/2023</div><div>DC End: 12/31/2024</div></div>		
Other Project Team Members	Taghreid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall		
Other Project Name	Social Relations 2022, DAWN, Social Relations 2023		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	DRI-CARI		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Check, post (\$25 Informant, \$100 R, \$200 R (end game for panel)); Cash, post (\$75 respondent, \$25 informant); Other (\$2 screener incentive)		
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox)		
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Report Period	Sep, 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. A meeting with held with the PIs in mid-September to clarify the weights needed. The PI's clarification resulted in more work being projected for the DMSS team, which will take the remainder of the study funds, and push delivery of weights until late October.		

We are monitoring the expenditures carefully.

<b>Special Issues</b>				
<b>Cost as of Oct 16, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>			6,138,023.76
	<b>Est Cost at Completion (E\$AC):</b>			6,141,119.95
	<b>Total Budget:</b>			6,141,810.11
	<b>Variance (Total Budget minus- E\$AC):</b>			690.16
	<b>Reason for Variance:</b>			The variance is insignificant. We do expect the use most of the project budget.
<b>Projections as of Oct 16, 2025</b>	<b>Dollars Projected for Month:</b>			1,123.32
	<b>Actual Dollars Used:</b>			1,013.80
	<b>Variance (Projected minus Actual):</b>			109.52
	<b>Reason for Variance:</b>			The variance is insignificant.
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
<b>Other Measures</b>				

<b>Project Name</b>	<b>(STARRS-LS 2020-2025) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study (On Track)</b>		
<b>Project Mode</b>	Primary: Web	Secondary: Telephone	Total of Modes: 2
<b>Project Type</b>	Sponsored Projects		
<b>Budget</b>	<b>Direct Budget:</b> 8,809,515.00	<b>Indirect Budget:</b> 4,920,601.00	<b>Total Budget:</b> 13,730,116.00
<b>Principal Investigator/Clients</b>	James Wagner (University of Michigan) Robert Ursano (Uniformed Services University of the Health Scienc) Murray Stein / Ron Kessler (University of California San Diego / Harvard)		
<b>Funding Agency</b>	Department of Defense		
<b>IRB</b>	<b>HUM#:</b> HUM00180765	<b>Period of Approval:</b> 3/21/24 - 3/20/25	
<b>Project Team</b>	<b>Project Lead:</b> Meredith A House <b>Budget Analyst:</b> William Lokers <b>Production Manager:</b> Ruth B Philippou <b>Senior Project Advisor:</b> Lisa S Holland <b>Production Manager 1:</b> Jeffrey Albrecht Jr <b>Production Manager 2:</b> Lisa M Lewandowski-Romps		
<b>Proposal #</b>	no data		
<b>Description</b>	<p>This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.</p> <p>For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data.</p> <p>To date, we have completed 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.</p> <p>In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys).</p>		
<b>SRO Project Period</b>	05/2020 - 02/2025		
<b>Data Col Period</b>	11/2022 - 04/2024		
<b>Security Plan</b>	Yes		
<b>Milestones</b>	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
<b>Other Project Team Members</b>	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		
<b>Other Project Name</b>	STARRS-LS Continuation STARRS-LS Waves 3, 4, 5 (Yr1)		
<b>Sample Mgmt System</b>	MSMS		
<b>Data Col Tool</b>	Blaise 5		
<b>Hardware</b>	Laptop; Desktop; [UM cell] Phone		

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

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<b>Report Period</b>	Sep, 2025 (STARRS-LS 2020-2025)	Closing
<b>Risk Level</b>	On Track	
<b>Monthly Updates</b>	See STARRS-LS 2025-2030	
<b>Special Issues</b>	See STARRS-LS 2025-2030	
<b>Cost as of Aug 31, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	13,771,748.45
	<b>Est Cost at Completion (E\$AC):</b>	13,771,748.45
	<b>Total Budget:</b>	13,730,116.00
	<b>Variance (Total Budget minus- E\$AC):</b>	-41,632.45
	<b>Reason for Variance:</b>	-\$41,632.45 remains to be transferred to Year 6 account/ first year of the new 2025-30 award period.
<b>Projections as of Aug 31, 2025</b>	<b>Dollars Projected for Month:</b>	0.00
	<b>Actual Dollars Used:</b>	417.77
	<b>Variance (Projected minus Actual):</b>	-417.77
	<b>Reason for Variance:</b>	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
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			

<b>Other Measures</b>	
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Project Name	(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 Investigator/Clients	James Wagner (University of Michigan) 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	<b>Project Lead:</b> Meredith A House <b>Budget Analyst:</b> William Lokers <b>Production Manager:</b> Ruth B Philippou <b>Senior Project Advisor:</b> Lisa S Holland <b>Production Manager 1:</b> Jeffrey Albrecht Jr <b>Production Manager 2:</b> Lisa M Lewandowski-Romps		
Proposal #	no data		
Description	<p>This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.</p> <p>For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data.</p> <p>To date, we have completed 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.</p> <p>In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys).</p>		
SRO Project Period	03/2025 - 02/2030		
Data Col Period	11/2024 - 04/2026		
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b> 04/01/2024  <b>Pretest End:</b>  <b>Staffing Complete:</b> 10/29/2024  <b>SS Train Start:</b> 11/21/2024  <b>DC Start:</b> 11/11/2024 </div> <div> <b>Pretest Start:</b>  <b>Recruitment Start:</b> 08/19/2024  <b>GIT Start:</b> 11/12/2024  <b>SS Train End:</b> 11/26/2024  <b>DC End:</b> 05/03/2026 </div> </div>		
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)	
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Report Period	Sep, 2025 (STARRS-LS 2025-2030)	Implementing
Risk Level	On Track	
Monthly Updates	<p>Project Management and Planning:</p> <ul style="list-style-type: none"><li>• We continued participation in discussions with the PIs/RT about establishing a “STARRS Collaboration Guidance Document,” which aims to establish clear guidance for all team members regarding collaboration and data access.</li><li>• We participated in discussions and shared information with the research team related to an updated biosample inventory received from Sampled at Rutgers.</li><li>• Budget/Funding:<ul style="list-style-type: none"><li>o We continued to move hours and costs from March, April and/or May 2025 to the new Year 6 account (currently established as a hardship). 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.</li><li>o U-M ORSP received the corrected subaward agreement (to indicate human subjects research) from HJF on September 17. The hold was released, but in the U-M system, it moved to another hold state for Security and Risk Review and stayed there through the end of the month. See also Areas of Risk, Mitigation Strategies section.</li><li>o We learned that Year 7 budgets are due to USUHS by November 6, 2025. The Year 7 POP will cover 12 months, January 2026-December 2026.</li></ul></li><li>• IRB:<ul style="list-style-type: none"><li>o Amendments to add Dr. Benedek as USUHS PI and Dr. Naifeh as Co-PI:</li><li>? Wave 5 IRB protocol – continued under review at USUHS.</li><li>? HADS IRB protocol – continued under review at USUHS.</li><li>? LS Continuation (W3, W4) – USUHS IRB concurrence letter was received on September 30.</li></ul></li><li>• We sent weekly production updates to the PIs, and reported on progress on the call with the Army/M&amp;RA.</li><li>• Meredith created the agenda/notes and facilitated the weekly meeting with the STARRS project managers.</li></ul> <p>Enclave and User Support:</p> <ul style="list-style-type: none"><li>• Annual IA security review: Scott sent a fourth reminder to AAG on September 23. The AAG contact responded with her availability and U-M suggested meeting October 3. On Oct. 3, the AAG contact emailed saying we will need to schedule a date after the furlough has ended.</li><li>• On September 12, enclave analysts were notified that the metadata had been loaded and codebook was available for the LSW4 data tables.</li><li>• On September 29, enclave analysts were notified of updates made to the LSW4 consent data table.</li><li>• Annual NDI Data Request (2025 request for data through 2023):<ul style="list-style-type: none"><li>o We learned that the CDC NDI office was unable to accept our newly e-signed NDI confidentiality agreements because the trust certificates for the digital signatures are not recognized by the NDI office computers, even those that were signed with a CAC or PIV card. The certificates would need to be installed to the computers in accordance with CDC guidelines, a process which could take some time due to cuts made to their programs.</li><li>o The CDC suggested that all agreements be re-signed with "wet ink" signatures. In addition, we learned there were newer versions of the confidentiality agreements than those that had been available in the online application system.</li><li>o U-M sent new agreement templates and instructions to all parties on September 8. By the end of the month, four of the six parties had re-signed with wet ink.</li><li>o We also awaited USUHS approval of the LSW5 and HADS IRB amendments for the USU PI change.</li></ul></li><li>• Collaboration with ORISE fellow, Dr. Dias, working with Dr. Jarvis of Army G-9/DPRR:<ul style="list-style-type: none"><li>o Processing of the DUA between USUHS and Dr. Dias (Oak Ridge Institute for Science and Education) continued.</li><li>o U-M assisted Harvard with questions about the restrictions on administrative variables that can/cannot be exported from the enclave for an external user like Dr. Dias.</li></ul></li><li>• The team continued work on address geocoding steps for Wave 3 and 4 respondent addresses, where their addresses have changed from previous survey administrations.</li><li>• Work to update the Wave 3 and 4 numbers in the blood/survey count tables for USUHS continued on hold due to work on other high priority items.</li><li>• Standard enclave activities continued. These include maintaining security requirements; processing background checks and Great Lakes Cluster (GLC) user access requests, drop box requests, ID swap and data transfer requests; managing software acquisition and updates; and providing user support as needed. Of particular note this month:<ul style="list-style-type: none"><li>o The enclave team completed the transfer and ID swaps for a population level "geospatial" variable file from Harvard (AAG) to the enclave.</li><li>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.</li><li>o We coordinated with USUHS on tracking updates to DUA extensions with external collaborators.</li></ul></li><li>• Biomarker group request for assistance:<ul style="list-style-type: none"><li>o STARRS genomic, diagnostic and sociodemographic data sharing with DHA (Dr. Evatt):</li><li>? James and Meredith continued participation in discussions with the PIs/RT about considerations related to collaboration and data sharing with Dr. Evatt, including costs/benefits, the scope of the request, and options for accessing the data.</li><li>? We worked toward preparing cost estimates for 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.</li></ul></li></ul> <p>Public Use Data:</p> <ul style="list-style-type: none"><li>• The correction to fix a merge error in LSW1 dataset was completed and released on the study page on October 1. (The merge error had occurred when we requested that 5 variables be updated at the time of releasing LSW2. Records with the new values for the 5 variables were appended instead of merged with the original dataset. The</li></ul>	

data was not incorrect but it was represented in 2 rows for each respondent.)

- 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 Pls/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 2, 2025, are as follows:
  - o Replicates released: 10 of 14 released with 10,531 sample lines.
  - o Completed interviews: 6,816 (6,586 web; 230 phone)
  - o Replicate 8 ended production on October 1, with a final response rate of 73.8%, which is slightly below the average rate but not the lowest rate so far in Wave 5. The overall response rate for completed replicates is now 75.2% (down slightly from 75.3%).
  - o Replicate 9 moved into Phase 3 by October 2; the response rate was 53.0% and tracking with the average rate.
  - o Replicate 10 was released on September 29 and had one completed survey by October 2.
  - o The response rate for completed replicates (Reps 1-8) is 75.2%.

#### Safety Plan Results:

- The Wave 5 combined Safety Plan rate was 12.5% as of Oct 2:
  - o Army Chaplains:
    - ? 2,025 (# started IW), 1,947 (# completed IW), 154 (safety plan checks), 7.6% activation rate
  - o U-M CCP:
    - ? 5,052 (# started IW), 4,868 (# completed IW), 730 (safety plan checks), 14.5% activation rate

#### Special Issues

Language in the following area of risk/mitigation strategy in the report to the Pls/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 U-M ORSP received the corrected subaward agreement (to indicate human subjects research) from HJF on September 17. The hold was released, but in the U-M system, it moved to another hold state for Security and Risk Review and stayed there through the end of the month. As of the date of this report, all holds had been lifted and the award is going through final processing steps before activation.
  - o SRC's approval of a hardship was limited to an initial three months. The start letter was dated April 1 so the actual Year 6 subaward should have been in place by no later than July 1, 2025. As of July, we had overrun our hardship time period and budget. This situation exposed SRO/SRC to significant risk and the possibility of having to stop work. However, given the agreement is now final and going through internal U-M steps before activation, we do not anticipate further problems.
  - o With process delays on both sides, the annual awarding process is tenuous at best. We are anticipating a smoother process under the new FY25 award. 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.

<b>Cost as of Aug 31, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	1,514,870.56
	<b>Est Cost at Completion (E\$AC):</b>	14,739,985.71
	<b>Total Budget:</b>	14,776,161.00
	<b>Variance (Total Budget minus- E\$AC):</b>	36,175.29
	<b>Reason for Variance:</b>	All but ~\$41K has been transferred from Year 5 of 2020-25 to Year 6 (first year of 2025-30) so this amount was added into the projections. Other updates for the month included minor hours adjustments for a few staff and removing the IDC charge from equipment

<b>Projections as of Aug 31, 2025</b>	<b>Dollars Projected for Month:</b>	322,051.44
	<b>Actual Dollars Used:</b>	304,020.42
	<b>Variance (Projected minus Actual):</b>	18,031.02
	<b>Reason for Variance:</b>	There was nothing too noteworthy in terms of variances. Respondent payment actuals were about \$5K less than projected.

Measures		Units at Complete	RR	HPI
	<b>Current Goal:</b>	10,763	74%	18.0
	<b>Goal at Completion:</b>	10,763	74%	18.0
	<b>Current Actual:</b>	6,816	75.2% (Reps 1-8)	18.3
	<b>Estimate at Complete:</b>	10,763	74%	18.0
	<b>Variance:</b>	0	0	0

#### Other Measures

Stats as of 10/2/25

Project Name	(WalSS) U-M Wallenberg Institute Student Survey (On Track)		
Project Mode	Primary: Web      Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 1,002,656.00	Indirect Budget: 0.00	Total Budget: 1,002,656.00
Principal 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	<div><div>Pre Production Start: 02/01/2025</div><div>Pretest End: 06/30/2025</div><div>Staffing Complete:</div><div>SS Train Start: 10/03/2025</div><div>DC Start: 09/25/2025</div></div> <div><div>Pretest Start: 06/18/2025</div><div>Recruitment Start: 08/01/2025</div><div>GIT Start:</div><div>SS Train End: 10/03/2025</div><div>DC End: 11/25/2025</div></div>		
Other Project Team Members			
Other Project Name	Wallenberg Institute Student Survey		
Sample Mgmt System	Web SMS		
Data Col Tool	Qualtrics/Illume		
Hardware	NA		
DE Software	NA		
QC Recording Tool	Live monitoring		
Incentive	Yes, R		
Administration	NA		
Payment Type	Other (Electronic gift card, post)		
Payment Method	Other (Tango Card from ISR Business Office)		
-----			
Report Period	Sep, 2025 (WalSS)		Implementing
Risk Level	On Track		
Monthly Updates	<div>-Marsha set up the survey in Qualtrics. Jeffrey coordinated testing with Bill and Nahid as testers.</div> <div>-Jennie set up the data download to separate the main and NAPE survey data.</div> <div>-Hueichun and Holly set up Web SMS. Jeffrey conducted integration testing with Tango API and Qualtrics.</div> <div>-Jeffrey, Jennie, and Hueichun conducted a prod data test to ensure data were populating as expected.</div> <div>-Nahid and Jeffrey coordinated the creation of a student-facing study logo, which was added to communications and the survey interface.</div> <div>-Bill and Jennie set up RCLS.</div> <div>-Wen and Makenna worked on setting up an R Shiny production report.</div> <div>-Nahid and Jeffrey added funds to the Tango account for production.</div> <div>-Jeffrey, Bill, and Nahid prepared for and conducted training for 7 STs and 3 TLs.</div> <div>-Jeffrey spec'd a data quality report, which Grace started setting up in September.</div>		

<b>Special Issues</b>	None to report at this time.	
<b>Cost as of Oct 09, 2025</b>	<b>Total Cost to Date (direct + indirect):</b>	151,116.59
	<b>Est Cost at Completion (E\$AC):</b>	312,470.68
	<b>Total Budget:</b>	1,002,656.00
	<b>Variance (Total Budget minus- E\$AC):</b>	9,578.32
	<b>Reason for Variance:</b>	Nicole realized that she needed to to manually adjust the admin fee to accommodate the overcharge that hit respondent payments in September, which resulted in \$4,573.21 additional underrun, which was previously \$5,101.33. Jeffrey is adding effort for most of the team, which is helpful.

<b>Projections as of Oct 09, 2025</b>	<b>Dollars Projected for Month:</b>	49,525.30
	<b>Actual Dollars Used:</b>	71,423.97
	<b>Variance (Projected minus Actual):</b>	-21,898.67
	<b>Reason for Variance:</b>	The overrun this month was due to the distribution of respondent payments. They were mostly projected for October, but we had a higher response than projected.

Measures		Units at Complete	RR	HPI
	<b>Current Goal:</b>	3957	39.6%	
	<b>Goal at Completion:</b>	3957	39.6%	
	<b>Current Actual:</b>	2869	28.7%	
	<b>Estimate at Complete:</b>	3957	39.6%	
	<b>Variance:</b>	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
TSME26 APP SECURITY (425196)	Initiatives	Implementing	Carol Lively	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TSME26 AUTO SCHEDULER (483257)	Initiatives	Planning	Debbie Seale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TSME26 BLAISE FEATURE TESTING (425200)	Initiatives	Initiation	Karl A Dinkelman	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TSME26 BLAISE PERFORMANCE (423562)	Initiatives	Initiation	Karl A Dinkelman	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TSME26 DCO SYSTEMS SUPPORT (483248)	Initiatives	Implementing	Vivienne Y Outlaw	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TSME26 GEOLOCATION (425201)	Initiatives	Implementing	Sarah Crane	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TSME26 LLM RESUME REVIEW (483424)	Initiatives	Final	Grant D Benson	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TSME26 LOGGING (483227)	Initiatives	Initiation	Hueichun Peng	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TSME26 MSMS PERFORMANCE (425267)	Initiatives	Implementing	Jim Rodgers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TSME26 PASSWORD RESET (425197)	Initiatives	Initiation	David Bolt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TSME26 QC SYSTEMS (483249)	Initiatives	Implementing	Sarah Elisa Broumand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TSME26 RCLS (425198)	Initiatives	Initiation	Hueichun Peng	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TSME26 REPLACE RPAY (423463)	Initiatives	Initiation	Hueichun Peng	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TSME26 SURVEYTRAK MAINTENANCE (483257)	Initiatives	Implementing	Jeffrey L Smith	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TSME26 TEAM LOCATION (424466)	Initiatives	Planning	Mark Simonson	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Project Name	(TSME26 APP SECURITY (425196)) TSME26 APP SECURITY (425196) (Some Concerns)		
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	<b>Project Lead:</b> Carol Lively <b>Budget Analyst:</b> Nicole Danielle Doherty <b>Production Manager:</b> <b>Senior Project Advisor:</b> Carol Lively <b>Production Manager 1:</b> <b>Production Manager 2:</b>		
Proposal #	no data		
Description	TSME26 Project		
SRO Project Period	06/2025 - 06/2026		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
=====			
Report Period	Sep, 2025 (TSME26 APP SECURITY)		Implementing
Risk Level	Some Concerns		
Monthly Updates	October charges should be coming in with upcoming NYH Deadlines for our security changes. TSG is slower on making these security changes than expected.		
Special Issues			
Cost as of	<b>Total Cost to Date (direct + indirect):</b>		0.00
	<b>Est Cost at Completion (E\$AC):</b>		0.00
	<b>Total Budget:</b>		18,000.00
	<b>Variance (Total Budget minus- E\$AC):</b>		0.00
	<b>Reason for Variance:</b>		
Projections as of	<b>Dollars Projected for Month:</b>		0.00
	<b>Actual Dollars Used:</b>		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 AUTO SCHEDULER (483257)) TSME26 AUTO SCHEDULER (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: Debbie Seale		
	Budget Analyst: Nicole Danielle Doherty		
	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	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
=====			
Report Period	Sep, 2025 (TSME26 AUTO SCHEDULER)		Planning
Risk Level	On Track		
Monthly Updates	The project team continues to meet regularly to address specification questions, with Max focused on the data input system and Minako developing the interface system. We remain on track to complete the full scope of work before the end of the fiscal year.		
Special Issues			
Cost as of Oct 16, 2025	Total Cost to Date (direct + indirect):		2,681.07
	Est Cost at Completion (E\$AC):		19,092.02
	Total Budget:		10,000.00
	Variance (Total Budget minus- E\$AC):		-9,092.02
	Reason for Variance:	Additional funds were added to the budget to meet the scope of work needed.	
Projections as of Oct 16, 2025	Dollars Projected for Month:		5,590.07

**Actual Dollars Used:** 2,681.07

**Variance (Projected minus Actual):** 2,909.00

**Reason for Variance:** We have requested a reallocation of hours to different months that have not been adjusted in RFT as of today.

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

**Other Measures**

Project Name	(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	<b>Project Lead:</b> Karl A Dinkelmann <b>Budget Analyst:</b> Nicole Danielle Doher <b>Production Manager:</b> <b>Senior Project Advisor:</b> Carol Lively <b>Production Manager 1:</b> <b>Production Manager 2:</b>		
Proposal #	no data		
Description	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	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
Other Project Team Members	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	Sep, 2025 (TSME26 BLAISE FEATURE TESTING (425200))		Initiation
Risk Level	On Track		
Monthly Updates	Nothing new last month to report.		
Special Issues			
Cost as of Oct 08, 2025	<b>Total Cost to Date (direct + indirect):</b>		0.00
	<b>Est Cost at Completion (E\$AC):</b>		0.00
	<b>Total Budget:</b>		10,000.00
	<b>Variance (Total Budget minus- E\$AC):</b>		10,000.00

Reason for Variance:		na		
Projections as of Oct 08, 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	<div> <div> Pre Production Start:   Pretest End:   Staffing Complete:   SS Train Start:   DC Start: </div> <div> Pretest Start:   Recruitment Start:   GIT Start:   SS Train End:   DC End: </div> </div>		
Other Project Team Members	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	Sep, 2025 (TSME26 BLAISE)		Initiation
Risk Level	On Track		
Monthly Updates	Nothing new last month to report.		
Special Issues			
Cost as of Oct 08, 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 Oct 08, 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 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	<b>Project Lead:</b> Vivienne Y Outlaw <b>Budget Analyst:</b> Nicole Danielle Doher <b>Production Manager:</b> <b>Senior Project Advisor:</b> Carol Lively <b>Production Manager 1:</b> <b>Production Manager 2:</b>		
Proposal #	no data		
Description	DCO Systems Support		
SRO Project Period	07/2025 - 06/2026		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
-----			
Report Period	Sep, 2025 (TSME26 DCO SYSTEMS		Implementing
Risk Level	On Track		
Monthly Updates	- Monitored the TeamTailor geocoding process - Communicated with CMT and TeamTailor to fix the database connection issues due to TeamTailor's change of security policy. - Designed new business rules to populate the TL/PC dropdown for the EMS module		
Special Issues	na		
Cost as of Oct 16, 2025	<b>Total Cost to Date (direct + indirect):</b>		9,810.56
	<b>Est Cost at Completion (E\$AC):</b>		17,139.74
	<b>Total Budget:</b>		42,000.00
	<b>Variance (Total Budget minus- E\$AC):</b>		24,860.26
	<b>Reason for Variance:</b>		Not all projects and coverage has been planned for the FY

Projections as of Oct 16, 2025		<i>Dollars Projected for Month:</i>		2,383.49
		<i>Actual Dollars Used:</i>		5,537.39
		<i>Variance (Projected minus Actual):</i>		-3,153.90
		<i>Reason for Variance:</i> Changes needed in the applicant tracking mapping systems was needed to address changes.		
Measures		Units at Complete	RR	HPI
	<i>Current Goal:</i>			
	<i>Goal at Completion:</i>			
	<i>Current Actual:</i>			
	<i>Estimate at Complete:</i>			
	<i>Variance:</i>			
Other Measures	X			

Project Name	(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	<b>Project Lead:</b> Sarah Crane <b>Budget Analyst:</b> Nicole Danielle Doherty <b>Production Manager:</b> <b>Senior Project Advisor:</b> Carol Lively <b>Production Manager 1:</b> Elizabeth Ohryn <b>Production Manager 2:</b>		
Proposal #	no data		
Description	Geolocation for Screener Projects		
SRO Project Period	07/2025 - 06/2026		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
Other Project Team Members	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	Sep, 2025 (TSME26 GEOLOCATION)		Implementing
Risk Level	On Track		
Monthly Updates	9/10 Review of modifications 9/19 Project Review  Tool still in development, including mods for NYCHVS.		
Special Issues			
Cost as of Oct 08, 2025	<b>Total Cost to Date (direct + indirect):</b>		2,241.43
	<b>Est Cost at Completion (E\$AC):</b>		14,206.27
	<b>Total Budget:</b>		15,000.00
	<b>Variance (Total Budget minus- E\$AC):</b>		793.73
	<b>Reason for Variance:</b>		Low-level maintenance estimate once tool launches for NYCHVS
Projections as of Oct 08, 2025	<b>Dollars Projected for Month:</b>		2,253.47

**Actual Dollars Used:** 2,241.43

**Variance (Projected minus Actual):** 12.04

**Reason for Variance:** Minor variance in hours

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

**Other Measures**

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	<b>Project Lead:</b> Grant D Benson <b>Budget Analyst:</b> Nicole Danielle Doher <b>Production Manager:</b> <b>Senior Project Advisor:</b> Shonda R Kruger-Ndiaye <b>Production Manager 1:</b> <b>Production Manager 2:</b>		
Proposal #	no data		
Description	The purpose of this project was to explore potential tools that field interviewers could use when interacting with HH members who might not speak a language that the interviewer speaks. We would want to be able to (a) identify the language, (b) engage in brief, non-standardized communication to convey our purpose and (c) potentially set an appointment for an interviewer to return who speaks the appropriate language. One specific tool we had in mind for consideration was Google Translate installed on an SRO phone.		
SRO Project Period	07/2025 - 06/2026		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
Other Project Team Members	TBD		
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	[UM cell] Phone		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
-----			
Report Period	Sep, 2025 (TSME26 LLM RESUME REVIEW (483424))		Final
Risk Level	On Track		
Monthly Updates	Due to a rapidly changing scene in translation tools -- including the LanguageLine offering from U-M & AI speech to text apps -- as well as needing to have programmers focus on other activities rather than developing a wrap for something like Google Translate, we are closing out this initiative. Funding will be transferred to the Autoscheduler developmental effort. The shortcode will be reassigned to the development initiative aimed at comparing Qualtrics programming with specifications.		
Special Issues			
Cost as of	<b>Total Cost to Date (direct + indirect):</b>		0.00
	<b>Est Cost at Completion (E\$AC):</b>		0.00
	<b>Total Budget:</b>		1.00

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

Project Name	(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	<b>Project Lead:</b> Hueichun Peng <b>Budget Analyst:</b> Nicole Danielle Doherty <b>Production Manager:</b> <b>Senior Project Advisor:</b> Carol Lively <b>Production Manager 1:</b> <b>Production Manager 2:</b>		
Proposal #	no data		
Description	Mail/PAPI/Bio Logging		
SRO Project Period	07/2025 - 06/2026		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
=====			
Report Period	Sep, 2025 (TSME26 LOGGING (483227))		Initiation
Risk Level	On Track		
Monthly Updates	Major programming work is on hold due to waiting for msms 2.0 API.		
Special Issues	Major programming on hold due to waiting for msms 2.0 API.		
Cost as of Oct 16, 2025	<b>Total Cost to Date (direct + indirect):</b>		2,052.61
	<b>Est Cost at Completion (E\$AC):</b>		17,906.44
	<b>Total Budget:</b>		30,000.00
	<b>Variance (Total Budget minus- E\$AC):</b>		12,093.56
	<b>Reason for Variance:</b> programming on hold due to waiting for msms 2.0 API.		
Projections as of Oct 16, 2025	<b>Dollars Projected for Month:</b>		4,857.83
	<b>Actual Dollars Used:</b>		1,889.32
	<b>Variance (Projected minus Actual):</b>		2,968.51

**Reason for Variance:**

programming on hold due to waiting for msms 2.0 API.

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

**Other Measures**

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	<b>Project Lead:</b> Jim Rodgers <b>Budget Analyst:</b> Nicole Danielle Doherty <b>Production Manager:</b> <b>Senior Project Advisor:</b> Carol Lively <b>Production Manager 1:</b> <b>Production Manager 2:</b>		
Proposal #	no data		
Description	TSME26 project		
SRO Project Period	07/2025 - 06/2026		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
=====			
Report Period	Sep, 2025 (TSME26 MSMS)		Implementing
Risk Level	On Track		
Monthly Updates	Ongoing		
Special Issues			
Cost as of Oct 08, 2025	<b>Total Cost to Date (direct + indirect):</b>		27,462.70
	<b>Est Cost at Completion (E\$AC):</b>		112,697.66
	<b>Total Budget:</b>		100,000.00
	<b>Variance (Total Budget minus- E\$AC):</b>		-12,697.66
	<b>Reason for Variance:</b>		Variance
Projections as of Oct 08, 2025	<b>Dollars Projected for Month:</b>		9,623.30
	<b>Actual Dollars Used:</b>		10,505.95
	<b>Variance (Projected minus Actual):</b>		-882.65

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

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	<b>Project Lead:</b> David Bolt <b>Budget Analyst:</b> Nicole Danielle Doherty <b>Production Manager:</b> <b>Senior Project Advisor:</b> Carol Lively <b>Production Manager 1:</b> <b>Production Manager 2:</b>		
Proposal #	no data		
Description	TSME26 Project		
SRO Project Period	07/2025 - 06/2026		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
=====			
Report Period	Sep, 2025 (TSME26 PASSWORD RESET)		Initiation
Risk Level	On Track		
Monthly Updates	No update as work will not start until 3rd quarter.		
Special Issues			
Cost as of	<b>Total Cost to Date (direct + indirect):</b>		0.00
	<b>Est Cost at Completion (E\$AC):</b>		0.00
	<b>Total Budget:</b>		5,000.00
	<b>Variance (Total Budget minus- E\$AC):</b>		0.00
	<b>Reason for Variance:</b>		
Projections as of	<b>Dollars Projected for Month:</b>		0.00
	<b>Actual Dollars Used:</b>		0.00
	<b>Variance (Projected minus Actual):</b>		0.00

*Reason for Variance:*

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

Other Measures

Project Name	(TSME26 QC SYSTEMS (483249)) TSME26 QC SYSTEMS (483249) (Some Concerns)		
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	<b>Project Lead:</b> Sarah Elisa Broumand <b>Budget Analyst:</b> Nicole Danielle Doher <b>Production Manager:</b> Sarah Elisa Broumand <b>Senior Project Advisor:</b> Carol Lively <b>Production Manager 1:</b> <b>Production Manager 2:</b>		
Proposal #	no data		
Description	QC Systems		
SRO Project Period	07/2025 - 06/2026		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
=====			
Report Period	Sep, 2025 (TSME26 QC SYSTEMS)		Implementing
Risk Level	Some Concerns		
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.		
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 Oct 16, 2025	<b>Total Cost to Date (direct + indirect):</b>		12,385.67
	<b>Est Cost at Completion (E\$AC):</b>		29,852.20
	<b>Total Budget:</b>		30,000.00

Variance (Total Budget minus- E\$AC):		147.80		
Reason for Variance:		negligible		
Projections as of Oct 16, 2025	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.		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

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	<b>Project Lead:</b> Hueichun Peng <b>Budget Analyst:</b> Nicole Danielle Doher <b>Production Manager:</b> <b>Senior Project Advisor:</b> Andrew L Hupp <b>Production Manager 1:</b> <b>Production Manager 2:</b>		
Proposal #	no data		
Description	TSME26 Project		
SRO Project Period	07/2025 - 06/2026		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
=====			
Report Period	Sep, 2025 (TSME26 RCLS (425198))		Initiation
Risk Level	On Track		
Monthly Updates	1. RCLS team has met with DCO OCT team to understand the requirements. 2. RCLS team has met with TSG MSMS team to understand the limitations of API library against the requirements. 3. ODC team has worked on the NAPE datawarehouse for the search function.		
Special Issues	1. Due to limitation of MSMS 1.0 libraries, the data display part cannot be implemented and wait for MSMS 2.0. However, the plan-b solution is to query ODS for data display and save call records to MSMS using ResultArtifact API.		
Cost as of Oct 16, 2025	<b>Total Cost to Date (direct + indirect):</b>		6,044.80
	<b>Est Cost at Completion (E\$AC):</b>		24,299.87
	<b>Total Budget:</b>		35,000.00
	<b>Variance (Total Budget minus- E\$AC):</b>		10,700.13
	<b>Reason for Variance:</b>		na

Projections as of Oct 16, 2025		<i>Dollars Projected for Month:</i>		6,087.54
		<i>Actual Dollars Used:</i>		6,258.69
		<i>Variance (Projected minus Actual):</i>		-171.15
		<i>Reason for Variance:</i>		
		na		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

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	<b>Project Lead:</b> Hueichun Peng <b>Budget Analyst:</b> Nicole Danielle Doher <b>Production Manager:</b> <b>Senior Project Advisor:</b> Carol Lively <b>Production Manager 1:</b> <b>Production Manager 2:</b>		
Proposal #	no data		
Description	TSME26 Project		
SRO Project Period	06/2025 - 07/2026		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
-----			
Report Period	Sep, 2025 (TSME26 REPLACE RPAY)		Initiation
Risk Level	On Track		
Monthly Updates	R-Pay team met with users to confirm the requirements. Programming work is on hold in this month due to focus on RCLS.		
Special Issues			
Cost as of Oct 16, 2025	<b>Total Cost to Date (direct + indirect):</b>		0.00
	<b>Est Cost at Completion (E\$AC):</b>		0.00
	<b>Total Budget:</b>		35,000.00
	<b>Variance (Total Budget minus- E\$AC):</b>		35,000.00
	<b>Reason for Variance:</b>		na
Projections as of Oct 16, 2025	<b>Dollars Projected for Month:</b>		0.00
	<b>Actual Dollars Used:</b>		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 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	<b>Project Lead:</b> Jeffrey L Smith <b>Budget Analyst:</b> Nicole Danielle Doher <b>Production Manager:</b> <b>Senior Project Advisor:</b> Carol Lively <b>Production Manager 1:</b> <b>Production Manager 2:</b>		
Proposal #	no data		
Description	SurveyTrak Maintenance		
SRO Project Period	07/2025 - 06/2026		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
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Report Period	Sep, 2025 (TSME26 SURVEYTRAK)		Implementing
Risk Level	On Track		
Monthly Updates	Encrypted SurveyTrak password for Employee Data Merge Encrypted SurveyTrak password for Database Extractor Encrypted SurveyTrak password for ST Admin 25 Final testing and release for PRER Archiving PowerBuilder builds SRSM for Team Dynamix SurveyTrak/PowerBuilder Build Team meeting SurveyTrak 25 and Windows 11 updates Moving WebTrak25 code to Git		
Special Issues			
Cost as of Oct 16, 2025	<b>Total Cost to Date (direct + indirect):</b>		2,503.70
	<b>Est Cost at Completion (E\$AC):</b>		9,121.84

<b>Total Budget:</b>		10,000.00		
<b>Variance (Total Budget minus- E\$AC):</b>		878.16		
<b>Reason for Variance:</b>		See below		
<b>Projections as of Oct 16, 2025</b>	<b>Dollars Projected for Month:</b>	920.33		
	<b>Actual Dollars Used:</b>	2,443.72		
	<b>Variance (Projected minus Actual):</b>	-1,523.39		
	<b>Reason for Variance:</b>	See notes		
<b>Measures</b>		<b>Units at Complete</b>	<b>RR</b>	<b>HPI</b>
	<b>Current Goal:</b>			
	<b>Goal at Completion:</b>			
	<b>Current Actual:</b>			
	<b>Estimate at Complete:</b>			
	<b>Variance:</b>			
<b>Other Measures</b>				

Project Name	(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	<b>Project Lead:</b> Mark Simonson <b>Budget Analyst:</b> Nicole Danielle Doherty <b>Production Manager:</b> <b>Senior Project Advisor:</b> Carol Lively <b>Production Manager 1:</b> <b>Production Manager 2:</b>		
Proposal #	no data		
Description	TSME26 Project		
SRO Project Period	07/2025 - 06/2026		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> <b>Pre Production Start:</b>   <b>Pretest End:</b>   <b>Staffing Complete:</b>   <b>SS Train Start:</b>   <b>DC Start:</b> </div> <div> <b>Pretest Start:</b>   <b>Recruitment Start:</b>   <b>GIT Start:</b>   <b>SS Train End:</b>   <b>DC End:</b> </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		
=====			
Report Period	Sep, 2025 (TSME26 TEAM LOCATION)	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 Oct 16, 2025	<b>Total Cost to Date (direct + indirect):</b>		0.00
	<b>Est Cost at Completion (E\$AC):</b>		9,003.42
	<b>Total Budget:</b>		9,000.00
	<b>Variance (Total Budget minus- E\$AC):</b>		-3.42
	<b>Reason for Variance:</b>		negilgible
Projections as of Oct 16, 2025	<b>Dollars Projected for Month:</b>		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
	<i>Current Goal:</i>			
	<i>Goal at Completion:</i>			
	<i>Current Actual:</i>			
	<i>Estimate at Complete:</i>			
	<i>Variance:</i>			

Other Measures