Survey Research Operations

Monthly Project Report

Sponsored Data Collection Projects and Development Initiative

December 2025

Sponsored Data Collection Projects and Development Initiative Projects

(ANES 2024) American National Election Studies - 2024
(BFY) Baby's First Years
(CAMS 2025) HRS 2025 Consumption and Activity Mail Study
(CCS) Community College Survey
(CVFS-SCAN) Chitwan Valley Family Study - Study on Cognition and Aging in Nepal
(FFCWS) Future of Families and Child Wellbeing Study
(FIMS) Faculty Impact 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
(HRS 2026) Health and Retirement Study 2026
(HRS MGX) Health and Retirement Study (HRS) Mid-Generation X (MGenX) pre-ID
(LHMS 2023 Fall) Life History Mail Study Fall 2023
(LHMS 2023 Spring) Life History Mail Study Spring 2023
(LHMS 2025 Fall) Life History Mail Study Fall 2025
(LHMS 2025 Spring) Life History Mail Study Spring 2025
(MI CReSS CS Reboot) Michigan COVID-19 Recovery Surveillance Study Community Survey
(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027
(MTF Early Panel Pilot) Monitoring the Future: A Cohort-Sequential Panel Study of Drug Use, Ages 19-65 - Administrative Supplement #1 (8/10th Grade Panel)
(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027
(MTF Panel Technical Development) Monitoring the Future 2022 -2027 Panel Technical Development
(NDWS) National Dementia Workforce Study
(NYCHVS) New York City Housing and Vacancy Survey
(PR-PSID) Puerto Rico Panel Study of Income Dynamics
(PSID TAS 2025) Transition to Adulthood within its Life Course & Intergenerational Family Context
(PSID25) Panel Study of Income Dynamics Core 2025
(SAFEGUARD) SAFEGUARD
(SCA Web 2025) SCA Web 2025
(SRS 2021) Social Relations 2023
(STARRS-LS 2020-2025) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study
(STARRS-LS 2025-2030) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study
(WaISS) U-M Wallenberg Institute Student Survey
(TSME26 APP SECURITY (425196)) TSME26 APP SECURITY (425196)
(TSME26 AUTO SCHEDULER (483257)) TSME26 AUTO SCHEDULER (483257)
(TSME26 BLAISE FEATURE TESTING (425200)) TSME26 BLAISE FEATURE TESTING (425200)
(TSME26 BLAISE PERFORMANCE (423562)) TSME26 BLAISE PERFORMANCE (423562)
(TSME26 DCO SYSTEMS SUPPORT (483248)) TSME26 DCO SYSTEMS SUPPORT (483248)
(TSME26 GEOLOCATION (425201)) TSME26 GEOLOCATION (425201)
(TSME26 LLM RESUME REVIEW (483424)) TSME26 LLM RESUME REVIEW (483424)
(TSME26 LOGGING (483227)) TSME26 LOGGING (483227)
(TSME26 MSMS PERFORMANCE (425267)) TSME26 MSMS PERFORMANCE (425267)
(TSME26 PASSWORD RESET (425197)) TSME26 PASSWORD RESET (425197)
(TSME26 QC SYSTEMS (483249)) TSME26 QC SYSTEMS (483249)
(TSME26 RCLS (425198)) TSME26 RCLS (425198)
(TSME26 REPLACE RPAY (423463)) TSME26 REPLACE RPAY (423463)
(TSME26 SURVEYTRAK MAINTENANCE (483257)) TSME26 SURVEYTRAK MAINTENANCE (483257)
(TSME26 TEAM LOCATION (424466)) TSME26 TEAM LOCATION (424466)

Sponsored Projects Dashboard

NonArchived Sponsored Projects

Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
ANES 2024	Sponsored	Closing	Andrew L Hupp	🟡	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	☐	🟢
BFY	Sponsored	Implementing	Piotr Dworak	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟡	🟡	🟡	☐	🟡
CAMS 2025	Sponsored	Implementing	Gloria J Baker	☐	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	☐	🟢
CCS	Sponsored	Closing	Jeffrey Albrecht Jr	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	☐	🟢
CVFS-SCAN	Sponsored	Implementing	Maureen Joan O'Brien	🟢	🟢	🟢	🟢	🟢	🟢	🟡	🟢	🟢	🟢	☐	🟢
FFCWS	Sponsored	Implementing	Rebecca Gatward	☐	☐	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	☐	🟢
FIMS	Sponsored	Initiation	Donnalee Ann Grey-Farquharson	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	🟢
HCHD-2025 Locating	Sponsored	Closing	Barbara Lohr Ward	☐	☐	☐	☐	☐	🟢	🟡	🟢	🟢	🟡	☐	🟢
Health and Well Being in SE MI	Sponsored	Closing	Barbara Lohr Ward	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	☐	🟢
Healthy Brain Project	Sponsored	Closing	Barbara Lohr Ward	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	☐	🟡
HRS 2026	Sponsored	Planning	Evanthia Leissou	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢	☐	🟢
HRS MGX	Sponsored	Implementing	Andrew L Hupp	☐	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	☐	🟢
LHMS 2023 Fall	Sponsored	Closing	Gary Hein	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	☐	🟢
LHMS 2023 Spring	Sponsored	Closing	Gary Hein	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	☐	🟢
LHMS 2025 Fall	Sponsored	Implementing	Gary Hein	☐	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	☐	🟢
LHMS 2025 Spring	Sponsored	Implementing	Gary Hein	☐	☐	☐	☐	🟢	🟢	🟢	🟢	🟢	🟢	☐	🟢
MI CReSS CS Reboot	Sponsored	Initiation	Timothy Prand	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	🟢
MTF Base Year 2022_27	Sponsored	Implementing	Rebecca Gatward	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	☐	🟢
MTF Early Panel Pilot	Sponsored	Closing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	☐	🟢
MTF Panel 2022-27	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	☐	🟢
MTF Panel Technical Development	Sponsored	Initiation	Donnalee Ann Grey-Farquharson	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	🟢
NDWS	Sponsored	Implementing	Piotr Dworak	🟢	🟢	🟢	🟢	🟢	🟢	🟡	🟢	🟢	🟢	☐	🟢
NYCHVS	Sponsored	Implementing	Maureen Joan O'Brien	☐	☐	☐	🟢	🟢	🟢	🟢	🟢	🟢	🟢	☐	🟢
PR-PSID	Sponsored	Implementing	Camila Kendall	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	☐	🟡
PSID TAS 2025	Sponsored	Implementing	Elizabeth Ohryn	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢	☐	🟢
PSID25	Sponsored	Implementing	Rachel Anne Orlowski	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	☐	🟢
SAFEGUARD	Sponsored	Planning	Daniel Tomlin	☐	☐	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	☐	🟢
SCA Web 2025	Sponsored	Initiation	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	Closing	Jeffrey Albrecht Jr	☐	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	☐	🟢

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

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

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

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

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

Monthly Updates	The 2024 data collection has ended.
	In-person:
	  -PRE: 1,042 interviews (966 in-person, 68 phone, 8 mixed + 0 partials)
	  -POST: 90% reinterview goal (n=938)
	    -Actual: 925 (89%); 372 In-person, 220 Telephone, 332 Video + 1 partial
	Web - Fresh
	  -PRE: 2,063 interviews (2,022 + 41 partials)
	  -POST: 85% reinterview goal (n=1,754)
	    -Actual: 1,769 (86%) (1,721 + 48 partials)
	Web - Panel
	  -PRE: 2,171 interviews (2,158 + 13 partials)
	  -POST: 90% reinterview goal (n=1,954)
	    -Actual: 2,070 (95%) (2,040 + 30 partials)
	Web - GSS
	  -PRE: 987 interviews (978 + 9 partials)
	  -POST: 85% reinterview goal (n=839)
	    -Actual: 807 (82%) (807 + 26 partials)
	Paper
	  -PRE: 245
	  -POST: 85% reinterview goal (n=208)
	    -Actual: 202 (82%)
	
	SRO finished up the most important problem (MIP) questions coding.
	
	ANES reviewed their deliverables and requested the login data. We have delivered the login data. We also delivered the insufficient partial data for pre-election cases.
	
	The remaining work on the study consists of:
	--GSS weighting/final weights (the initial delivery of information for weights was based on a smaller number of cases than we provided. We've provided them the list of the collaboration IDs again so they can deliver the correct data for Sampling to complete the weights).
	--Vote validation work (Minako has done some work, but this is on hold until the Spring when she has more availability)
	--Technical (methodology) report (there is a draft that is being refined).
	
	We've set-up a new shortcode (and projections) associated with the new NSF grant awarded to CPS for the weighting, vote validation, and manuscript preparation of findings from the study. Andrew provided an SOW to Sabrina for these funds.

Special Issues	

Cost as of Jan 09, 2026	*Total Cost to Date (direct + indirect):*	7,529,205.51
	Est Cost at Completion (E$AC):	7,517,339.76
	Total Budget:	7,526,240.00
	Variance (Total Budget minus- E$AC):	8,900.24
	Reason for Variance:	The reason the estimated cost is currently less than the costs to date is we are expecting credits for uncashed checks over the coming months.
Projections as of Jan 09, 2026	*Dollars Projected for Month:*	-20,599.80
	Actual Dollars Used:	-6,048.20
	Variance (Projected minus Actual):	14,551.60
	Reason for Variance:	The credit for uncashed checks was not as large as anticipated. The difference has been moved forward.

Measures

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

Other Measures

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

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

Description (continued):

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

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

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

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

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

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

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

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

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

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

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

Our main concern at this point is the increasing projected overrun through August 2027 due to increased scope of the Age 6 lab recruitment. To reduce the overrun, we are limiting the number of active cases to reduce iwer workload. Of the 320 cases selected in November, we have 183 left to re-contact and we will await the PIs funding approval before we expand work to other cases. We are recommending that we conserve as much as we can in the budget for the Age 8 lab recruitment starting in July 2026.

We see positive impact of this change on the monthly cost.

We have presented the projected overrun to the PIs and awaiting their decision on whether any funds can be added to ensure effective follow up and lab recruitment through August 2027.

Project Staffing:

In the fall of 2025, We brought in 2 bilingual on-staffers who will help contacting respondents across all four sites. The team required augmenting after one bilingual iwer becoming a production manager, one iwer still working but on the side of a full-time job, and one recently expressing a need to pause work on BFY, we start feeling short-staffed.

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

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

Special Issues	Budget: We are making adjustments to projections to make sure we have enough to cover Lab recruitment for Age 8 scheduled for July 2026 - August 2027. Awaiting PI approval for the new cost model.
Cost as of Jan 18, 2026	*Total Cost to Date (direct + indirect):* 417,111.16
	Est Cost at Completion (E$AC): 955,860.10

	Total Budget:		862,500.00
	Variance (Total Budget minus- E$AC):		-93,360.10
	Reason for Variance:	This variance represents a budgeting scenario which might be needed to complete the work through August 2027. PIs were presented with the re-budget and we are awaiting their approval.	
Projections as of Jan 18, 2026	Dollars Projected for Month:		38,086.21
	Actual Dollars Used:		20,330.06
	Variance (Projected minus Actual):		17,756.15
	Reason for Variance:	In the past few months we implemented austerity plans and limited the scope of contact update to focus only on cases which have not been contacted. This is saving our monthly cost while we await PI approval to increase our budget.	

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

Other Measures

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

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

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

Report Period	Dec, 2025 (CAMS 2025)	Implementing
Risk Level	On Track	
Monthly Updates	In the month of November and December: 1. Reminder postcard mailed 11/13/25; 1st reminder packet mailed 11/26/25; Final reminder packet mailed 12/10/25. 2. Logged received SAQs and undeliverable packets. 3. Shipped 3643 SAQs to MSG in weekly shipments. 4. Thank you cards are mailed monthly.	

Special Issues				
Cost as of Jan 18, 2026	*Total Cost to Date (direct + indirect):*			422,619.28
	Est Cost at Completion (E$AC):			512,986.29
	Total Budget:			534,085.00
	Variance (Total Budget minus- E$AC):			21,098.71
	Reason for Variance:	Variance is based on revised DataForce projections following the decision to send the final mailing via first class instead of priority mail.		
Projections as of Jan 18, 2026	*Dollars Projected for Month:*			85,208.19
	Actual Dollars Used:			19,993.64
	Variance (Projected minus Actual):			65,214.55
	Reason for Variance:	Variance is due to delayed billing by MSG. An invoice was just submitted in January for 26,740.28 and no invoices have been sent for scanning as of now. Additionally, check voids for 3142.45 were not projected. Investigating reason for voids at this time.		

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:		2023 Wk 13 RR=56%	
	Goal at Completion:			
	Current Actual:	3766	51%	N/A
	Estimate at Complete:			
	Variance:			

Other Measures

Project Name	**(CCS) Community College Survey (On Track)**		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 560,774.00	**Indirect Budget:** 84,115.00	**Total Budget:** 781,266.00
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 - 12/2025		
Data Col Period	10/2023 - 11/2024		
Security Plan	NA		

Milestones	*Pre Production Start:* 08/01/2025	*Pretest Start:*
	Pretest End:	*Recruitment Start:*
	Staffing Complete:	*GIT Start:*
	SS Train Start:	*SS Train End:*
	DC Start: 10/13/2025	*DC End:* 12/07/2025

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

Report Period	Dec, 2025 (CCS)	Closing
Risk Level	On Track	
Monthly Updates	-Data collection was very smooth in November and December. -Ruth coordinated reminder calling in the SSL from 11/17-12/5. -Data collection closed on December 7. -Jeff delivered coded survey data and updated contact information to the PIs in December. -Jeff reconciled respondent payments. -The subaward for Waves 1-3 and the fall recontact effort is ready to close out.	

Special Issues	-The project is transitioning to another subaward for Waves 4-5. It is currently with U-M ORSP, so the project is currently operating on a hardship account. We anticipate that the subaward will be processed by the end of February.		
Cost as of Jan 26, 2026	*Total Cost to Date (direct + indirect):*		930,095.38
	Est Cost at Completion (E$AC):		926,852.71
	Total Budget:		781,266.00
	Variance (Total Budget minus- E$AC):		-28,397.71
	Reason for Variance:	The cost share on this project is $25,667. The overrun reported above includes indirect costs, but only direct costs are charged to the project at this point. The direct total actuals in the latest cost report equal $808,778.53 with a $805,958.82 cost at completion. After accounting for the cost share, the underrun would be $974.18 under the met cost share. However, the final cost report will not be available until next month. Nicole and Bill confirmed that FSR shows a final overrun of $106.86 over the met cost share. Thus, we ended the project slightly over budget as instructed by admin.	
Projections as of Jan 26, 2026	*Dollars Projected for Month:*		1,648.29
	Actual Dollars Used:		3,483.68
	Variance (Projected minus Actual):		-1,835.39
	Reason for Variance:	The overrun is due to an overcharge by Jeff that was corrected in late December. This update will be reflected in the final cost report next month.	

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

Other Measures

Project Name	**(CVFS-SCAN) Chitwan Valley Family Study - Study on Cognition and Aging in Nepal (On Track)**		
Project Mode	Primary: Face to Face Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 368,868.00	**Indirect Budget:** 206,571.00	**Total Budget:** 575,439.00
Principal	Dirgha Ghimire (Survey Research Center)		
Investigator/Clients	Carlos Mendes de Leon (Georgetown University School of Medicine)		
	Emily Briceno-ABreu, Co-PI (Michigan Medicine)		
Funding Agency	NIH		
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Maureen Joan O'Brien		
	Budget Analyst: Joseph Zylka		
	Production Manager:		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	SRO is working cooperatively with the PIs and their research team as well as the Institue for Social and Environmental Research – Nepal – ISERN – to provide consultation, programming and support for data collection over 2 waves of interviewing. SRO will provide support in the following areas: instrument programming and testing, sample management system programming and testing, and data delivery.		
SRO Project Period	07/2024 - 05/2027		
Data Col Period			
Security Plan	NA		

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

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

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

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

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

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

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

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

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

Special Issues	NIH Funding Review	
Cost as of Jan 13, 2026	***Total Cost to Date (direct + indirect):***	416,915.74
	Est Cost at Completion (E$AC):	562,258.40
	Total Budget:	575,439.00
	Variance (Total Budget minus- E$AC):	13,180.60
	Reason for Variance:	Wave 2 dates and scope have been discussed and communicated to SRO. We have updated projections and will continue to do so.
Projections as of Jan 13, 2026	***Dollars Projected for Month:***	3,488.38
	Actual Dollars Used:	3,336.27
	Variance (Projected minus Actual):	152.11
	Reason for Variance:	There were issues with WEBTRAK that required SRO effort to resolve, so hours went a bit over.

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

Project Name	(FFCWS) Future of Families and Child Wellbeing Study (On Track)		
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 2,765,404.00	**Indirect Budget:** 1,548,632.00	**Total Budget:** 4,314,036.00
Principal	Kathryn Edin (Princeton University)		
Investigator/Clients	Jane Waldfogel (Columbia University)		
	Anna Haskins (University of Notre Dame)		
Funding Agency	Eunice Kennedy Shriver National Institute of Child Health and Human Development (NICHD)		
IRB	**HUM#:** HUM00255752		**Period of Approval:**
Project Team	**Project Lead:** Rebecca Gatward		
	Budget Analyst: Joseph Zylka		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	The Future of Families and Child Wellbeing Study (FFCWS, formerly The Fragile Families and Child Wellbeing Study) is based on a stratified, multistage sample of 4898 children born in 20 large U.S. cities (with populations over 200,000) between 1998 and 2000, where births to unmarried mothers were oversampled by a ratio of 3 to 1. This sampling strategy resulted in the inclusion of a large number of Black, Hispanic, and low-income families. Mothers were interviewed shortly after birth and fathers were interviewed at the hospital or by phone. Follow-up interviews have been conducted when children were approximately ages 1, 3, 5, 9, 15, and 22. When weighted, the data are representative of births in large US cities. The FFCWS consists of a core survey with mothers, fathers, primary caregivers, and the child (now a young adult). Additionally, collaborative project contribute questions to the surveys and collect new data on a subset of parents and children. Beginning with the baseline interviews in 1998-2000, the core study was originally designed to primarily address four questions of great interest to researchers and policy makers: 1. What are the conditions and capabilities of unmarried parents, especially fathers? 2. What is the nature of the relationships between unmarried parents? 3. How do children born into these families fare? and 4. How do policies and environmental conditions affect families and children? Princeton are the IRB of record for this project and we have established a reliance agreement (HUM00255752).		
SRO Project Period	10/2024 - 06/2029		
Data Col Period	01/2026 - 12/2026		
Security Plan	NA		

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

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

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

Report Period	Dec, 2025 (FFCWS)	Implementing
Risk Level	On Track	
Monthly Updates	December 2025 Locating work is still confined to online searches – any necessary phone calls/emails to confirm calls are pending IRB approval. In total 798 cases will need some locating effort. This includes the addresses with an 'undeliverable' outcome from both newsletter mailings and the cases where the newsletter was not mailed due to insufficient address details. To date, some locating effort has been made on 780 of the 798 (98%) that require locating, of these, a lead has been found for 749 cases. Locators began confirming leads with Contact Persons and Informants at the end of November 2025. To date, some locating effort has been made on 787 of the 798 (99%) that require locating, of those with a lead found, through online searches, 446 now have a confirmed lead. Any cases with a confirmed address by 12/1/25 (~90) are included in the first pre-contact mailing (letter, text and email). This first release includes ~4250 Study Participants. We randomly selected ~100 cases to receive their precontact letter (plus anemail and/or text invite) on 1/21/26. Assuming all goes well, the remaining cases in release 1 will be sent the precontact mailing the following week (1/28/26). We hope that the remaining cases, with a confirmed lead, will be invited to take part in early February. - As of 1/19 all systems (including email and text templates) were signed off. Assuming all goes well with the production data load, we will proceed with the 'soft launch' pre-contact mailing on 1/21 (email and text invite will also be sent on that day). Some MSMS functionality was deprioritised until what is needed for production is signed off. This includes, verification and the letters module (on request letters mailed mailed by the PDMG team).	

Special Issues			
Cost as of Jan 18, 2026	*Total Cost to Date (direct + indirect):*		970,497.64
	Est Cost at Completion (E$AC):		4,322,036.85
	Total Budget:		4,314,036.00
	Variance (Total Budget minus- E$AC):		-8,000.85
	Reason for Variance:	Currently projecting a small overrun.	
Projections as of Jan 18, 2026	*Dollars Projected for Month:*		127,928.58
	Actual Dollars Used:		161,525.15
	Variance (Projected minus Actual):		-33,596.57
	Reason for Variance:	Work/schedule has shifted - resulting in more hours being used in December than originally projected.	

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

Other Measures

Project Name	**(FIMS) Faculty Impact Study (On Track)**
Project Mode	Primary: Web Total of Modes: 1
Project Type	Sponsored Projects
Budget	**Direct Budget**: 24,785.00 **Indirect Budget:** 0.00 **Total Budget:** 24,785.00
Principal Investigator/Clients	Durga Singer (U-M Medical School)
Funding Agency	SRC
IRB	*HUM#:* *Period of Approval:*
Project Team	*Project Lead:* Donnalee Ann Grey-Farquharson
	Budget Analyst: Carl S Remmert
	Production Manager:
	Senior Project Advisor: Lisa S Holland
	Production Manager 1:
	Production Manager 2:
Proposal #	no data
Description	Survey Research Operations (SRO) is providing resources and support for web data collection for a Survey to Assess Faculty Impact. This is being conducted by Dr. Durga Singer, a professor of pediatrics in the U-M Medical School. SRO will help design the survey, carry out data collection and provide limited analytic support.
	The following assumptions were used to create the estimate. Note: Subsequent to the draft of the proposal the client has decided that there is no need for phone number as they do not want us to call or text the participants since it may be counter-productive.
	Management • SRO will provide a single point of contact to act as a liaison between the Principal Investigator and SRO. • SRO will provide project management for sample management, questionnaire development, instrument programming and testing, survey implementation, data management, and analysis.
	Sampling • The client will provide a list sample of potential participants including names, email addresses, and telephone numbers. We assume complete and accurate contact information. Instrument Development and Programming • SRO will review the draft questionnaire and make recommendations regarding wording, format, layout, and potential sources of response error. • SRO will program and test a web-based instrument expected to take no more than 15 minutes to complete.
	Sample Management System Programming • SRO will modify existing systems to manage survey invitations and all non-response follow up including email reminders, text reminders, and reminder calling. • The sample management system will also be used to monitor production and sample performance.
	Data Collection • SRO will implement web-based data collection over a 4-6 week period in the winter of 2026. o Send an email invitation to participate in the web-based survey. o Send up to three email reminders for participation. o Send texts/conduct reminder calling to increase participation [cost presented separately]. o Provide weekly progress updates during the production period. • This estimate includes no materials or effort for hard copy mailing and no respondent incentives.
	Post-Survey Processing • SRO will provide data management and basic analysis of survey data. • This estimate includes effort to code responses to one open-ended question. We assume 1 question, 2 mentions per question for 150 responses. • SRO will create a final report of survey results and data collection methods. • SRO will provide cost monitoring and final cost reports.
SRO Project Period	10/2025 - 05/2026
Data Col Period	01/2026 - 03/2026
Security Plan	NA

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

Other Project Team Members	Lisa Holland (SPA), Donnalee Grey-Farquharson (Project Lead), Hueichun Peng (Technical Support), Carl Remmert (Budget Analyst)
Other Project Name	
Sample Mgmt System	Qualtrics/Illume
Data Col Tool	Qualtrics/Illume
Hardware	NA
DE Software	N/A
QC Recording Tool	N/A
Incentive	Not used
Administration	N/A
Payment Type	N/A
Payment Method	N/A

Report Period	Dec, 2025 (FIMS)		Initiation
Risk Level	On Track		
Monthly Updates	Final testing and signoff by PI was completed.		
Special Issues			
Cost as of Dec 31, 2025	Total Cost to Date (direct + indirect):		5,680.00
	Est Cost at Completion (E$AC):		20,875.88
	Total Budget:		24,785.00
	Variance (Total Budget minus- E$AC):		3,909.12
	Reason for Variance:	25 hours not projected - adjustment will be made	
Projections as of Dec 31, 2025	Dollars Projected for Month:		3,798.97
	Actual Dollars Used:		2,671.60
	Variance (Projected minus Actual):		1,127.37
	Reason for Variance:	Less hours charged than projected.	

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

Project Name	**(HCHD-2025 Locating) Housing & Children's Healthy Development 2025 Locating (On Track)**
Project Mode	Primary: Tracking Total of Modes: 1
Project Type	Sponsored Projects
Budget	**Direct Budget**: 74,484.00 **Indirect Budget:** 41,931.00 **Total Budget:** 116,415.00
Principal	Stephanie Chardoul (Survey Research Operations)
Investigator/Clients	Sandra Newman (Johns Hopkins University)
Funding Agency	
IRB	*HUM#:* HUM00271320 *Period of Approval:*
Project Team	*Project Lead:* Barbara Lohr Ward
	Budget Analyst: Carl S Remmert
	Production Manager: Carolyn Vieira-Martinez
	Senior Project Advisor: Barbara Lohr Ward
	Production Manager 1: Megan Hromco
	Production Manager 2: Ian Woods
Proposal #	no data
Description	SRO will attempt to located 895 eligible Wave 1 Voucher respondents. SRO will conduct batch locating, followed by a mailing to all 895 Wave 1 respondents. SRO will hire & train 3 to 5 SSL locators who will make outgoing phone calls to respondents to update their contact information in advance of a planned (but not yet funded) Wave 3 data collection effort. A locating letter with a $5 token of appreciation will invite respondents to update their contact information by completing a web form (Qualtrics), by calling the RCT, or by emailing the study mailbox. Centralized manual location efforts will include database searches and direct calling to those respondents who have not yet updated their contact information. SRO will provide monthly progress and cost reports to the client.
SRO Project Period	02/2025 - 11/2025
Data Col Period	06/2025 - 10/2025
Security Plan	NA

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

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

Report Period	Dec, 2025 (HCHD-2025 Locating)	Closing
Risk Level	On Track	
Monthly Updates	At the PI's request, locating activities were extended into December with support from SRO overhead. In December 2025, the SRO team concluded SSL locating outreach on December 13. The DMSS team prepared geocodes and Census codes and those were provided to the research team. Census codes were provided in two batches, on Dec 12 and Dec 19. A preliminary final project report was prepared and delivered on Dec 23.	

At the PI's request, locating activities were extended into December with support from SRO overhead. In December 2025, the SRO team concluded SSL locating outreach on December 13. The DMSS team prepared geocodes and Census codes and those were provided to the research team. Census codes were provided in two batches, on Dec 12 and Dec 19. A preliminary final project report was prepared and delivered on Dec 23.

In early January, the SSL team reviewed all call records, resulting in a few changes to outcome codes. The final report was updated and a final deliverable provided to the PI. Final cost and activity reports were delivered in January 2026. SRO also prepared a quarterly report for submission to HUD.

The SSL Locating team achieved a response rate of 49.9% (AAPOR RR#2).

The SSL team

Special Issues

Cost as of Jan 18, 2026	*Total Cost to Date (direct + indirect):*	115,913.74
	Est Cost at Completion (E$AC):	115,913.74
	Total Budget:	116,415.00
	Variance (Total Budget minus- E$AC):	501.26
	Reason for Variance:	This variance is insignificant.
Projections as of Jan 18, 2026	*Dollars Projected for Month:*	3,162.88
	Actual Dollars Used:	4,315.34
	Variance (Projected minus Actual):	-1,152.46
	Reason for Variance:	More hours were charged in December due to additional work requested by the PIs.

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

Other Measures

Project Name	**(Health and Well Being in SE MI) Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan) (On Track)**
Project Mode	Primary: Face to Face Total of Modes: 1
Project Type	Sponsored Projects
Budget	**Direct Budget**: 2,409,055.00 **Indirect Budget:** 1,349,072.00 **Total Budget:** 3,758,127.00
Principal Investigator/Clients	Kristine Ajrouch (Life Course Development Program, SRC)
	Toni Antonucchi (Life Course Development Program, SRC)
	Laura Zahodne (Life Course Development Program, SRC)
Funding Agency	
IRB	**HUM#:** HUM00154638 ***Period of Approval:*** 1/17/2025 -1/16/2026
Project Team	***Project Lead:*** Barbara Lohr Ward
	Budget Analyst: Christine Evanchek
	Production Manager: Veronica Connors-Burge
	Senior Project Advisor: Nicole G Kirgis
	Production Manager 1: Taghreid Lovell
	Production Manager 2: Ian Ogden
Proposal #	no data
Description	Conduct 600 interviews with recently identified Arab Americans aged 65 or older residing in Southeast Michigan and 330 interviews with Social Relations sample members aged 65 or older. The Arab American sample will be selected based on an in-person household screening. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements. Social Relations respondents will only complete the cognitive interview. An informant interview will also be conducted for all sample members. Interviews will be conducted in English or Arabic.
SRO Project Period	05/2019 - 03/2023
Data Col Period	05/2023 - 03/2024
Security Plan	No

Milestones			
Pre Production Start: 12/01/2022		***Pretest Start:***	
Pretest End:		***Recruitment Start:*** 02/01/2023	
Staffing Complete: 04/10/2023		***GIT Start:*** 05/16/2023	
SS Train Start: 05/18/2023		***SS Train End:*** 05/25/2023	
DC Start: 05/30/2023		***DC End:*** 03/15/2025	

Other Project Team Members	Taghreid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall
Other Project Name	Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan)
Sample Mgmt System	SurveyTrak
Data Col Tool	Blaise 4.8
Hardware	Laptop; [UM cell] Phone; Paper and Pencil
DE Software	Other (Weblog)
QC Recording Tool	DRI-CARI; Camtasia
Incentive	Yes, R; Yes, INF
Administration	SRO Group
Payment Type	Check, post ($25 Informant, $100 R, $200 R (end game for panel)); Cash, post ($25 Informant, $100 R, $200 R (end game for panel)); Other ($2 screener incentive)
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office

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Report Period	Dec, 2025 (Health and Well Being in SE MI)	Closing
Risk Level	On Track	
Monthly Updates	The project team continued to work on weights, the sampling report and the final report. The SRO team is continuing to work on the Sampling report and the final report.	
	Deliverables still outstanding include the final sampling report, the weighting report, and the final project report.	

Special Issues	The PIs may ask for some re-work on weights. That is yet to be determined.		
Cost as of Jan 18, 2026	*Total Cost to Date (direct + indirect):*		3,753,498.95
	Est Cost at Completion (E$AC):		3,756,320.02
	Total Budget:		3,758,127.00
	Variance (Total Budget minus- E$AC):		1,806.98
	Reason for Variance:	The variance is insignificant.	
Projections as of Jan 18, 2026	*Dollars Projected for Month:*		6,058.58
	Actual Dollars Used:		4,933.54
	Variance (Projected minus Actual):		1,125.04
	Reason for Variance:	Work on the weighting report and final report had been scheduled but are still outstanding.	

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

Other Measures

Cost as of Jan 18, 2026	*Total Cost to Date (direct + indirect):*		3,753,498.95
	Est Cost at Completion (E$AC):		3,756,320.02

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

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

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

Report Period	Dec, 2025 (Healthy Brain Project)	Closing
Risk Level	Some Concerns	
Monthly Updates	The project team continued to work on weights, the sampling report and the final report. The final set of weights ws delivered at the end of October.	

Special Issues	The PIs may ask for some re-work on weights. We are waiting for that to be determined.			
Cost as of Jan 18, 2026	*Total Cost to Date (direct + indirect):*			1,531,862.87
	Est Cost at Completion (E$AC):			1,534,683.94
	Total Budget:			1,537,306.00
	Variance (Total Budget minus- E$AC):			2,622.06
	Reason for Variance:	The variance is due to the unexpected efficiency of the convenience sample and the D-AMP CS panel (compared to the historic SRS panel sample). We expect to end the study with a very small underrun.		
Projections as of Jan 18, 2026	*Dollars Projected for Month:*			1,756.51
	Actual Dollars Used:			-14.73
	Variance (Projected minus Actual):			1,771.24
	Reason for Variance:	Work on the project reports was delayed.		

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

Other Measures

Project Name	**(HRS 2026) Health and Retirement Study 2026 (On Track)**		
Project Mode	Primary: Mixed Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 15,430,967.00	**Indirect Budget:** 5,555,146.00	**Total Budget:** 20,986,113.00
Principal	David Weir (ISR-SRC)		
Investigator/Clients	Kenneth Langa (ISR-SRC)		
	Jessica Faul (ISR-SRC)		
Funding Agency			
IRB	*HUM#:* HUM00246459		*Period of Approval:* 4/22/2024
Project Team	*Project Lead:* Evanthia Leissou		
	Budget Analyst: David Kellermeyer		
	Production Manager: Andrea Sims		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Derek Dubuque		
	Production Manager 2: Jennifer C Arrieta		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.		
SRO Project Period	06/2025 - 12/2027		
Data Col Period	05/2026 - 07/2027		
Security Plan	Yes		

Milestones		
Pre Production Start: 06/17/2025		*Pretest Start:* 02/06/2026
Pretest End: 02/22/2026		*Recruitment Start:* 08/18/2025
Staffing Complete: 04/08/2026		*GIT Start:* 04/23/2026
SS Train Start: 04/23/2026		*SS Train End:* 04/30/2026
DC Start: 05/04/2026		*DC End:* 07/03/2027

Other Project Team Members	PDMG/DCO: Andria Shimoura Goedert, Alex Warju, Chelsea Graham, Kristen LoDuca, Daniah Buageila, Erin McSpadden, Gary Hein, Jeannie Baker, Janet McBride, Melissa Luker, Paul Burton, Sharon K Parker, Anthony Romanowski, Vanessa Clarke, Edwina Yang, Training Coordinator: Ashanti Harris Tech Team: Brianna Sabol, David Bolt, Ashwin Dey, Deborah Wilson, Jim Rodgers, Jeffrey L Smith, Karl A Dinkelmann, Kelly A Chatain, Laura Yoder, Kelly Lieske, Marsha Skoman, Pamela I Swanson, Shane Empie, Stephanie L Windisch, Sarah Broumond
Other Project Name	HRS 2026 Panel
Sample Mgmt System	SurveyTrak; MSMS
Data Col Tool	Blaise 5; SAQ
Hardware	Laptop; [UM cell] Phone
DE Software	Other (Blaise 5 Coding Application); External vendor (DataForce)
QC Recording Tool	Camtasia
Incentive	Yes, R; Yes, INF
Administration	SRO Group
Payment Type	Check, prepaid ($100 (Interview)); Check, post ($50 (WBD), $20 (SSA)); Cash, post ($20 (SAQ))
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office

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

Monthly Updates	During the month: -The training and project team prepared for pretest, team leader, and interviewer production trainings. -Programming work continued for SurveyTrak, Blaise, WebTrak, and FPR. -Integrated testing progressed for interviewer-administered interviews in SurveyTrak and for WebTrak; testing of the self-administered web survey in MSMS began. Programmers received minor specification updates for SurveyTrak, WebTrak, and FPRs. -TSG Admin decided to use Big Apple for the HRS 2026 Web Panel, after reviewing the HRS schedule and updated Nautilus architecture estimates.
Special Issues	Development of a DIM for Blaise 5.15 to enable offline functionality for the HRS 2026 Web Panel non-response follow-up was put on hold, as TSG resources shifted to other projects scheduled to launch in early 2026.

Cost as of Jan 18, 2026		
Total Cost to Date (direct + indirect):		602,277.44
Est Cost at Completion (E$AC):		20,936,155.63
Total Budget:		20,986,113.00
Variance (Total Budget minus- E$AC):		49,957.37
Reason for Variance:	Projections since the prior month's rMPR is a result of initial cost projections having been entered into CRS.	

Projections as of Jan 18, 2026		
Dollars Projected for Month:		235,988.58
Actual Dollars Used:		159,526.21
Variance (Projected minus Actual):		76,462.37
Reason for Variance:	The variance is mainly due to respondent pretest payments, fewer staff hours in December than projected—partly because some staff accidentally charged HRS 2024—and recharges. Future projections have been updated accordingly	

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

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

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

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

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

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

Report Period	Dec, 2025 (HRS MGX)	Implementing
Risk Level	On Track	
Monthly Updates	Production has been going well. We've been mostly above goals on hours, attempts, and completes each week. We concluded data collection in the field on 2025-12-20. All non-final cases were reviewed and either finalized, or invited to the web endgame. This last batch of web endgame cases are having their invitations mailed on 2026-01-15. Web will be available for approximately 4 weeks or possibly earlier or later depending on response. The final dataset will be delivered sometime in February.	
Special Issues		

Cost as of Jan 15, 2026	Total Cost to Date (direct + indirect):	2,242,043.83
	Est Cost at Completion (E$AC):	2,602,382.35
	Total Budget:	2,793,370.00
	Variance (Total Budget minus- E$AC):	190,987.65
	Reason for Variance:	Projecting an underrun. We will continue to monitor and discuss what, if anything, the PIs might was to use those funds for.
Projections as of Jan 15, 2026	Dollars Projected for Month:	388,116.82
	Actual Dollars Used:	374,527.76
	Variance (Projected minus Actual):	13,589.06
	Reason for Variance:	

Measures		Units at Complete	RR	HPI
	Current Goal:	1,734	30%	12
	Goal at Completion:			
	Current Actual:	1,639	29.6%	10.93
	Estimate at Complete:			
	Variance:			
Other Measures				

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

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

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

Report Period	Dec, 2025 (LHMS 2023 Fall)	Closing
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 Jan 18, 2026	*Total Cost to Date (direct + indirect):*			262,552.82
	Est Cost at Completion (E$AC):			262,552.82
	Total Budget:			505,359.00
	Variance (Total Budget minus- E$AC):			242,806.18
	Reason for Variance:	Staffing for reminder calling did not meet original projections and lower response rates than anticipated are resulting in lower costs across the project.		
Projections as of Jan 18, 2026	*Dollars Projected for Month:*			0.00
	Actual Dollars Used:			0.00
	Variance (Projected minus Actual):			0.00
	Reason for Variance:			

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

Other Measures	N/A

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

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

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

Report Period	Dec, 2025 (LHMS 2023 Spring)	Closing
Risk Level	On Track	
Monthly Updates	No activities. Project to be archived next month.	

Special Issues	Finance wants to bill current/future fall activities to the spring shortcode	
Cost as of Jan 18, 2026	*Total Cost to Date (direct + indirect):*	259,517.34
	Est Cost at Completion (E$AC):	262,709.69
	Total Budget:	457,922.00
	Variance (Total Budget minus- E$AC):	195,212.31
	Reason for Variance:	Actual sample of 1,950 is lower than budgeted sample of 2,288, resulting in generally lower costs across all resources. Check voids have also been added to the projections. In addition, the budgeted response rate was 54% but actual response rate is much lower as the respondents are non-responders from past waves of LHMS.
Projections as of Jan 18, 2026	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	-280.80
	Variance (Projected minus Actual):	280.80
	Reason for Variance:	

Measures		Units at Complete	RR	HPI
	Current Goal:	1053	54%	N/A
	Goal at Completion:	1053	54%	N/A
	Current Actual:	358	18%	N/A
	Estimate at Complete:	358	18%	N/A
	Variance:	695	36%	N/A

Other Measures	N/A

Project Name	**(LHMS 2025 Fall) Life History Mail Study Fall 2025 (On Track)**		
Project Mode	Primary: Mail　　Secondary: Web　　Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 766,039.00	**Indirect Budget:** 275,774.00	**Total Budget:** 1,041,813.00
Principal	David Weir (SRC)		
Investigator/Clients	Jacqui Smith (SRC)		
	Brady West (SRC)		
Funding Agency	NIH		
IRB	*HUM#:* HUM00246463		*Period of Approval:* 5/28/2025-5/27/2026
Project Team	*Project Lead:* Gary Hein		
	Budget Analyst: Cindy Tsao		
	Production Manager:		
	Senior Project Advisor: Evanthia Leissou		
	Production Manager 1: Chelsea Graham		
	Production Manager 2:		
Proposal #	no data		
Description	LHMS is part of the Health and Retirement Study (HRS). The goal of LHMS is to give participants an opportunity to share significant events that shaped their lives, reflect on their life history and share where they have lived, went to school, and what important events occurred in their lives. Information like this allows researchers to understand how individuals' pasts shape their health and economic situations today. In November 2025, a paper questionnaire and a $25 check as a token of appreciation will be mailed to a sample of approximately 6084 HRS Respondents. From this sample, approximately 2677 completed surveys are expected (44% response rate). For the reminder protocol, all respondents will receive a reminder mailing that includes the paper questionnaire, and a reminder postcard. Approximately 499 respondents will be mailed an invitation to take the survey over the web. The survey will be programmed in Blaise and managed in WSMS. The web reminder protocol consists of a reminder email (when email address is available), packet with paper SAQ, and a postcard.		
SRO Project Period	09/2025 - 08/2026		
Data Col Period	11/2025 - 04/2026		
Security Plan	NA		

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

Other Project Team Members	Gary Hein: Project Lead Cindy Tsao: Budget Analyst Chelsea Graham: Project Assistant Carolyn Viera Martinez: Coding Lead
Other Project Name	LHMS Fall
Sample Mgmt System	Project specific system (WSMS)
Data Col Tool	Blaise 4.8; SAQ
Hardware	Desktop; Paper and Pencil
DE Software	Other (Weblog)
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, prepaid ($25)
Payment Method	Check through STrak RPay System

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

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

Special Issues

Cost as of Jan 18, 2026	*Total Cost to Date (direct + indirect):*			410,050.71
	Est Cost at Completion (E$AC):			527,578.40
	Total Budget:			1,041,813.00
	Variance (Total Budget minus- E$AC):			514,234.60
	Reason for Variance:	Budget includes Spring 2025 costs, while actual costs incurred will only be for Fall 2025.		
Projections as of Jan 18, 2026	*Dollars Projected for Month:*			37,522.71
	Actual Dollars Used:			19,613.30
	Variance (Projected minus Actual):			17,909.41
	Reason for Variance:	~7k dataforce invoice projected for this month did not hit. General lower costs due to lower than expected response rate.		

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

Other Measures

Project Name	**(LHMS 2025 Spring) Life History Mail Study Spring 2025 (On Track)**		
Project Mode	Primary: Mail Secondary: Web Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 358,193.00	**Indirect Budget:** 200,588.00	**Total Budget:** 558,781.00
Principal	David Weir (SRC)		
Investigator/Clients	Jacqui Smith (SRC)		
	Brady West (SRC)		
Funding Agency	NIH		
IRB	*HUM#:* HUM00246463		*Period of Approval:* 5/28/2025-5/27/2026
Project Team	*Project Lead:* Gary Hein		
	Budget Analyst: Cindy Tsao		
	Production Manager:		
	Senior Project Advisor: Evanthia Leissou		
	Production Manager 1: Chelsea Graham		
	Production Manager 2:		
Proposal #	no data		
Description	LHMS is part of the Health and Retirement Study (HRS). The goal of LHMS is to give participants an opportunity to share significant events that shaped their lives, reflect on their life history and share where they have lived, went to school, and what important events occurred in their lives. Information like this allows researchers to understand how individuals' pasts shape their health and economic situations today. In June 2025, a paper questionnaire and a $25 check as a token of appreciation will be mailed to a sample of approximately 3600 HRS Respondents. From this sample, approximately 1509 completed surveys are expected (44% response rate). For the reminder protocol, all respondents will receive a reminder mailing that includes the paper questionnaire, and a reminder postcard. Approximately 400 respondents will be mailed an invitation to take the survey over the web. The survey will be programmed in Blaise and managed in WSMS. The web reminder protocol consists of a reminder email (when email address is available), packet with paper SAQ, and a postcard.		
SRO Project Period	03/2025 - 12/2025		
Data Col Period	06/2025 - 09/2025		
Security Plan	NA		

Milestones	*Pre Production Start:* 03/01/2025		*Pretest Start:*
	Pretest End:		*Recruitment Start:*
	Staffing Complete:		*GIT Start:*
	SS Train Start:		*SS Train End:*
	DC Start: 07/10/2025		*DC End:* 10/02/2025

Other Project Team Members	Gary Hein: Project Lead Cindy Tsao: Budget Analyst Chelsea Graham: Project Assistant Carolyn Viera Martinez: Coding Lead
Other Project Name	LHMS Spring
Sample Mgmt System	Project specific system (WSMS)
Data Col Tool	Blaise 4.8; SAQ
Hardware	Desktop; Paper and Pencil
DE Software	Other (Weblog)
QC Recording Tool	N/A
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, prepaid ($25)
Payment Method	Check through STrak RPay System

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

Monthly Updates	LHMS 2025 Spring Activities for December:
	1- Technical services (meetings/programming/testing/reporting) for Weblog/Webtrak. 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- Created and sent weekly progress reports. 7- Logged incoming SAQs 8- Processed undeliverable mail, replacement check requests and address updates 9- Fielded respondent emails and calls regarding technical issues or general questions about the project. 10- Sent logged SAQs to dataforce for scanning and processing 11- 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 Jan 16, 2026	*Total Cost to Date (direct + indirect):*	451,926.46
	Est Cost at Completion (E$AC):	507,671.41
	Total Budget:	558,781.00
	Variance (Total Budget minus- E$AC):	51,109.59
	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 Jan 16, 2026	*Dollars Projected for Month:*	30,194.68
	Actual Dollars Used:	4,674.35
	Variance (Projected minus Actual):	25,520.33
	Reason for Variance:	Dataforce invoice estimated at ~17k did not hit this month. Will project for February.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	1658	44%	N/A
	Goal at Completion:	1658	44%	N/A
	Current Actual:	1061	28%	N/A
	Estimate at Complete:	1080	29%	N/A
	Variance:	521	15%	N/A

Other Measures	

Project Name	**(MI CReSS CS Reboot) Michigan COVID-19 Recovery Surveillance Study Community Survey (On Track)**		
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 595,353.00	**Indirect Budget:** 154,793.00	**Total Budget:** 750,146.00
Principal Investigator/Clients	Nancy Fleischer (U-M School of Public Health (SPH))		
Funding Agency			
IRB	*HUM#:* HUM00264140		**Period of Approval:** 2/3/2025-7/31/2026
Project Team	*Project Lead:* Timothy Prand		
	Budget Analyst: Joseph Zylka		
	Production Manager: Lisa J Carn		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	The Michigan COVID-19 Recovery Surveillance Study (MI CReSS) is a population-based cohort study that is a collaborative project between the University of Michigan School of Public Health and the Michigan Department of Health and Human Services (MDHHS). The study was launched in June 2020 with the goal of understanding the experience and social impact of a COVID-19 diagnosis on adults living in Michigan and examined a wide range of topics including symptom severity and duration, recovery time, Long COVID, mental health impacts, stressful events, financial impacts, and more. The study includes a baseline and two follow-up data collections. The objective of the MI CReSS Community Survey is to understand the experiences of adults who lived in Michigan during the COVID-19 pandemic from priority populations that were underrepresented in the prior MI CReSS Cohort study. We identified two priority populations to focus on: people of racial and ethnic minoritized identities and people living in rural areas. The study will examine participants' experiences related to COVID-19 disease history, Long COVID, mental health, workplace experiences, ability to meet basic needs, and more. The University of Michigan (U-M) School of Public Health will lead this project and will work with the Survey Research Operations (SRO) team at the U-M Survey Research Center (SRC) within the U-M Institute of Social Research (ISR) to collect the project data. Project activities will occur in partnership with the Michigan Department of Health and Human Services (MDHHS).		
SRO Project Period	12/2025 - 07/2026		
Data Col Period	03/2026 - 05/2026		
Security Plan	NA		

Milestones	*Pre Production Start:* 12/01/2025		*Pretest Start:*
	Pretest End:		*Recruitment Start:* 12/08/2025
	Staffing Complete: 01/19/2026		*GIT Start:* 02/26/2026
	SS Train Start: 03/05/2026		*SS Train End:* 03/05/2026
	DC Start: 03/01/2026		*DC End:* 05/31/2026

Other Project Team Members	Helen Johnson / James Koopman - SSI Hueichum Peng - Technical Lead Peter Sparks/Ashwin Dey - Blaise Programmer Asia Paige - Data Manager Megan Hromco - SSA
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	Dec, 2025 (MI CReSS CS Reboot)		Initiation
Risk Level	On Track		
Monthly Updates	Everything to Start in January. Training scheduled for March 5th Rural Field start - 3/2/2026 Race/Ethnicity start - 3/16/2026		
Special Issues			
Cost as of Feb 12, 2026	***Total Cost to Date (direct + indirect):***		6,736.13
	Est Cost at Completion (E$AC):		743,999.41
	Total Budget:		750,146.00
	Variance (Total Budget minus- E$AC):		6,146.59
	Reason for Variance:	Should net out close to 0.	
Projections as of Feb 12, 2026	***Dollars Projected for Month:***		6,736.00
	Actual Dollars Used:		6,736.00
	Variance (Projected minus Actual):		0.00
	Reason for Variance:	Projections to start in January 2026	

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

Project Name	(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027 (On Track)		
Project Mode	Primary: Class SAQ Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 6,267,988.00	**Indirect Budget:** 3,510,072.00	**Total Budget:** 9,778,060.00
Principal Investigator/Clients	Richard Miech (SRC)		
Funding Agency	National Institute on Drug Abuse, one of the National Institutes of Health.		
IRB	**HUM#:** 00217920		**Period of Approval:** from 7/20/22 No CR
Project Team	**Project Lead:** Rebecca Gatward		
	Budget Analyst: Dean E Stevens		
	Production Manager: Margaret Lavanger		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	Since 1975 the MTF survey has measured drug and alcohol use and related attitudes among adolescent students nationwide. A nationally representative sample of survey participants report their drug use behaviors across three time periods: lifetime, past year, and past month. The survey is funded by the NIDA, a component of the National Institutes of Health (NIH), and conducted by the University of Michigan. It is based on two interconnected series of surveys using nationally representative samples: (a) self-administered annual in-school surveys of 8th, 10th, and 12th graders (~45,000) in 400 schools. Proctors (SRO interviewers) coordinate and administer the data collection in schools (the majority are conducted FTF however, the option is available for the survey to be conducted without the proctor visiting the school). (b) panels of high school graduates aged 19-30, 35, 40,45, 50, 55, and 60 (now primarily surveyed by web). Panel members aged 19-30 are invited to participate every other year/asked to complete a web survey and the older sample members are sent questionnaires (mail and web) at five-year interval. The MTF panel study has three parts - early in the year a newsletter is mailed to panel members. If the newsletter is returned (undelivered) locating effort targets these panel members and others who have not participated for X years. The web panel launches (web) in spring and in around June a telephone non-response effort begins for those invited to participate. The panel members are recruited from the 12th graders who participate in the base year study. Press releases and published results can be found here.. http://www.monitoringthefuture.org/		
SRO Project Period	04/2022 - 03/2027		
Data Col Period	04/2022 - 03/2027		
Security Plan	Yes		

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

Other Project Team Members	Hueichun Peng Technical Lead (WebSMS and Qualtrics programmer) Ed Green (+Brad Goodwin) Data Management Ashwin Dey SurveyTrak, WebTrak and MTF specific Apps. Programmer Brendon Carroll Help Desk/Tablet support
Other Project Name	
Sample Mgmt System	SurveyTrak; Web SMS
Data Col Tool	Other (Qualtrics)
Hardware	Laptop; Tablet; [UM cell] Phone
DE Software	Other (Qualtrics)
QC Recording Tool	N/A
Incentive	Yes, Other (Honorarium paid to school by MTF Research staff)
Administration	ISR Group
Payment Type	NA
Payment Method	Check through other system

Report Period	Dec, 2025 (MTF Base Year 2022_27)	Implementing
Risk Level	On Track	

Monthly Updates	December 2025
	TL training took place on 12/11. This year we have two new TLs who are new to MTF.
	Other pre-production tasks included; preparing training materials, updating systems for 2026 (minimal updates), assigning schools to Study Proctors and preparing Home Study and Training Presentations for the January trainings.

Special Issues

Cost as of Jan 18, 2026	*Total Cost to Date (direct + indirect):*		4,727,476.33
	Est Cost at Completion (E$AC):		7,056,333.31
	Total Budget:		9,778,060.00
	Variance (Total Budget minus- E$AC):		2,721,726.69
	Reason for Variance:	Projections for Funding period 2022 – 2027 (latest client report has been uploaded to MPR)	
		Current projections result in an under spend for the five year grant period. The projected costs are based on completion of 325 schools in years 2024 – 2027 (we were projecting costs for 400 schools) and all in-person. Illume charges have been removed from projections from 2024 onwards. A portion of the hours for work involved in transitioning MTF surveys to Qualtrics are being charged to the Illume recharge account.	
		Primary reason for the under spend and plans for SRO funding: Projections for the five year period are based on current scope of work and the adapted protocol (introduced in 2021). The budget prepared for the proposal was based on the pre-pandemic design. The adapted protocol brings savings in the following categories: interviewer hours, travel, shipping and staff time (specifically hours required for loading and preparing tablets for shipping). For the past few years the number of schools recruited and passed to SRO has been lower than the number used for this budget (n=390).	
		In response, MTF (SRC) have reduced our funding for the first two years. We have received (from MTF) $1,843,080 (Y1) and $1,143,890 (Y2) a total reduction of $815,581. Going forward, the current plan is to fund Year 3 and 4 based on the budgeted amount - if there is significant underspending MTF will reduce SRO's Year 5 award. SRO Finance group feels that we should continue to report/monitor using the original budgeted amount because this is not an official reduction in budget. We are keeping the client (via Nick Prieur) informed of actual and projected spend through a monthly cost report.	

Projections as of Jan 18, 2026	*Dollars Projected for Month:*		98,164.37
	Actual Dollars Used:		80,467.12
	Variance (Projected minus Actual):		17,697.25
	Reason for Variance:	Variance was a little higher this month - mainly due to over projection of interviewer hours for FTF recruitment.	

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

Other Measures

Project Name	(MTF Early Panel Pilot) Monitoring the Future: A Cohort-Sequential Panel Study of Drug Use, Ages 19-65 - Administrative Supplement #1 (8/10th Grade Panel) (On Track)		
Project Mode	Primary: Web		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 184,954.00	**Indirect Budget:** 103,575.00	**Total Budget:** 288,529.00
Principal Investigator/Clients	Megan Patrick (ISR, SRC)		
Funding Agency			
IRB	**HUM#:** 00244359		**Period of Approval:**
Project Team	**Project Lead:** Donnalee Ann Grey-Farquharson		
	Budget Analyst: Dean E Stevens		
	Production Manager:		
	Senior Project Advisor: Rebecca Gatward		
	Production Manager 1: Hongyu Johnson		
	Production Manager 2:		
Proposal #	no data		

Description	MTF Early Panel study is a study that will survey drug use in 9th and 11th graders who were 8th and 10th graders in 2023 wave baseline recruited samples. SRO will launch the 2024 and 2025 Web survey data collections with an estimated sample size of 600 cases for two wave of data collection. Although originally proposed, no reminder calling will be carried out on the early panel sample.
	
	This budget assumes an overall SRO involvement period of 20 months commencing in March 2024 with the data collections taking place during a 4-month period (for each wave), beginning in May 2024 (for Wave 1) and May 2025 (for Wave 2).
	
	Consent process
	 - Parents were mailed a letter with a link to a consent document in Qualtrics.
	 - After receiving parental consent, students were contacted so,
	 - Students on individual schedule, programmed in WebSMS
	
	Data Collection
	 - Invitation email
	 - followed by two reminders, 2 weeks apart if needed. Each student was on his/her own schedule based on when parental permission was received.
	
	Plan for Future
	 - Two more years of data collection
	   Year Recruited Follow-Up
	   2023 2024, 2025
	   2024 2025, 2026		

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

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

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

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

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Report Period	Dec, 2025 (MTF Early Panel Pilot)	Closing
Risk Level	On Track	
Monthly Updates	The project concluded at the end of December; no extension is planned. We are currently conducting project closing activities.	

Special Issues

Cost as of Dec 31, 2025	*Total Cost to Date (direct + indirect):*		278,640.01
	Est Cost at Completion (E$AC):		278,640.01
	Total Budget:		288,529.00
	Variance (Total Budget minus- E$AC):		9,888.99
	Reason for Variance:	The project concluded at the end of December and will not be extended. The budget underrun is $9888.99.	
Projections as of Dec 31, 2025	*Dollars Projected for Month:*		10,144.29
	Actual Dollars Used:		7,046.88
	Variance (Projected minus Actual):		3,097.41
	Reason for Variance:	A few staff are working on some project closing activities.	

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

Other Measures

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

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

Other Project Team Members	Rebecca Gatward (SPA), Donnalee Grey-Farquharson, Lloyd Hemingway, Dave Dybicki, Max Malholtra, Hueichun Peng, Shaowei Sun, Peter Sparks, Ashwin Dey, Hongyu Johnson, Brad Goodwin, Edward Green.
Other Project Name	MTF
Sample Mgmt System	Web SMS
Data Col Tool	Other (Qualtrics)
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	Yes, R
Administration	ISR Group (MTF Staff)
Payment Type	Check, prepaid; Check, post
Payment Method	Other (MTF Staff mails check)

Report Period	Dec, 2025 (MTF Panel 2022-27)		Implementing
Risk Level	On Track		
Monthly Updates	In December, the main activities involved preparing for the 2026 Data Collection and migrating the Winter Location project from the RLM system to WebSMS.		
Special Issues			
Cost as of Dec 31, 2025	***Total Cost to Date (direct + indirect):***		2,915,879.98
	Est Cost at Completion (E$AC):		3,951,703.01
	Total Budget:		3,895,217.00
	Variance (Total Budget minus- E$AC):		-56,486.01
	Reason for Variance:	We are working to further adjust operations to reduce overruns as we complete the final month of the 2026 wave data collection.	
Projections as of Dec 31, 2025	***Dollars Projected for Month:***		32,041.60
	Actual Dollars Used:		32,997.29
	Variance (Projected minus Actual):		-955.69
	Reason for Variance:	In December, costs for the MTF Panel Technology project are still being charged here due to a delay in setting up the project short codes. These will be reversed once short codes for the new project are available.	

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

Project Name	**(MTF Panel Technical Development) Monitoring the Future 2022 -2027 Panel Technical Development (On Track)**
Project Mode	Primary: Not Available
Project Type	Sponsored Projects
Budget	**Direct Budget**: 103,961.00　　**Indirect Budget:** 58,218.00　　**Total Budget:** 162,179.00
Principal Investigator/Clients	Megan Patrick (ISR/SRC)
Funding Agency	
IRB	*HUM#:*　　　　　　　　　　　　　　　　　　　　*Period of Approval:*
Project Team	*Project Lead:* Donnalee Ann Grey-Farquharson
	Budget Analyst: Dean E Stevens
	Production Manager:
	Senior Project Advisor:
	Production Manager 1:
	Production Manager 2:
Proposal #	no data
Description	This project is a technical innovation to complete programming and testing work to incorporate the functionalities associated with the current Respondent Locating Module (RLM) used for the Non-response and Winter Location calling projects into the current Sample Management System used by MTF (WebSMS), along with the automated delivery cases currently done by Blaise 4.8 CATI SMS. Both applications are old and no longer meet current security requirements. The upgraded system will manage case delivery and allow the interviewer to update contact information, initiate an automated email and/or text with the survey link when requested by the respondent, and enter a call record. The call record system will be programmed to inform the scheduling for the next call attempt, if necessary. The system will also be programmed to update completed survey status immediately to remove those cases from calling. For both Winter location and Non-response calling the new system will have the ability to load new cases during the course of the calling period. The system will be programmed and ready to be used for 2026 NR calling (5/2026) and then for 2027 WL (1/2027) and then onward for both.
SRO Project Period	11/2025 - 07/2026
Data Col Period	
Security Plan	NA

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

Other Project Team Members	Donnalee Grey-Farquharson, Hueichun Peng, Peter Sparks, Helen Johnson, Lloyd Hemingway, Edward Green, Ashwin Dey, Max Malhotra, Holly Ackerman, Dean Stevens
Other Project Name	
Sample Mgmt System	Web SMS
Data Col Tool	NA
Hardware	NA
DE Software	N/A
QC Recording Tool	N/A
Incentive	Not used
Administration	N/A
Payment Type	N/A
Payment Method	N/A

Report Period	Dec, 2025 (MTF Panel Technical Development)　　　　　　　　　Initiation
Risk Level	On Track
Monthly Updates	Key staff began preliminary programming in November. Implementation of system changes will continue before the NR Calling begins in May 2026. Starting in January 2026, staff will charge the Technical Development project short codes for this work and will reverse charges that were billed to Main MTF Panel before the shortcodes for this

project were ready.

Special Issues

Cost as of Dec 31, 2025	Total Cost to Date (direct + indirect):	0.00
	Est Cost at Completion (E$AC):	146,453.00
	Total Budget:	162,179.00
	Variance (Total Budget minus- E$AC):	15,725.00
	Reason for Variance:	The project was established in November. Shortcodes were not ready so charges were billed to Main MTF Panel and will be reversed.
Projections as of Dec 31, 2025	Dollars Projected for Month:	0.00
	Actual Dollars Used:	0.00
	Variance (Projected minus Actual):	0.00
	Reason for Variance:	

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

Other Measures

Project Name	**(NDWS) National Dementia Workforce Study (On Track)**
Project Mode	Primary: Not Available
Project Type	Sponsored Projects
Budget	**Direct Budget**: 4,327,548.00 **Indirect Budget:** 2,423,425.00 **Total Budget:** 6,750,973.00
Principal	Donovan Maust (Michigan Medicine)
Investigator/Clients	Joanne Spetz (University of California, San Francisco)
	James Wagner (University of Michigan - Survey Research Center)
Funding Agency	NIA
IRB	*HUM#:* *Period of Approval:*
Project Team	*Project Lead:* Piotr Dworak
	Budget Analyst: Nicole Danielle Doher
	Production Manager:
	Senior Project Advisor: Stephanie A Chardoul
	Production Manager 1: Dedra Campbell
	Production Manager 2: Lisa S Holland
Proposal #	no data
Description	The National Dementia Workforce Study (NDWS) will be launched by a national team of experts in clinical care of persons living with dementia, survey research, and health workforce research. The goal of the NDWS data infrastructure is to allow researchers and policymakers to ask and answer scientific questions to help build the workforce of clinicians and other professional care providers required by the growing population of persons living with dementia in the U.S. The Core of NDWS will be four surveys that reflect key elements of the professional dementia care workforce in the U.S.: Community Clinicians, Nursing Home Staff, Home Care Staff, and Assisted Living Staff. In addition to these surveys, the NDWS team will develop a variety of additional data sources that can be linked with the surveys in order to maximize the scientific potential of the surveys. The project's activities will be conducted through five Cores: 1) Administrative; 2) Screening and Survey Instrument; 3) Administrative Data Transfer, Masking, Access, and Ethics; 4) Data Collection, Linkages, Cleaning, and Sharing; and 5) Research Studies. The overall aims are to: 1) Launch a family of four nationally representative professional dementia workforce surveys covering the key care delivery settings in the U.S.; 2) Through the National Dementia Workforce Study, build a data infrastructure surrounding the dementia workforce surveys that allows researchers to generate critical insights into the professional dementia care workforce and associated outcomes for PLWD; and 3) Develop and expand the community of researchers focused on the professional dementia care workforce overall and that use the National Dementia Workforce Study data infrastructure. SRO's work is associate with Cores 2 and 4.
SRO Project Period	10/2023 - 09/2028
Data Col Period	
Security Plan	NA

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

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

Report Period	Dec, 2025 (NDWS)	Implementing
Risk Level	On Track	

Monthly Updates	December/January activities:

*Related to Wave 2 (May - December 2025): The following were Wave 2 end dates for data collection: W2 Facility recruitment: 11/30/2025, W2 Staff interviews:12/31/2025, W1 Staff Follow Up interviews:12/31/2025 and CC NRFU: 12/1/2025.

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

Below are final recruitment details (as of 01/08/26):

RTI:
Assisted Living: Out of 1000 agencies, 183 completed admin surveys, 126 rosters were delivered, 3200 staff rostered, 2303 were selected and 1613 staff surveys completed (70% completion rate). Nursing Homes: Out of 1000 agencies, 200 completed admin surveys, 144 rosters were delivered, 9033 staff rostered, 4240 were selected and 2413 staff surveys completed (56.9% completion rate). Community Clinicians: Out of 19,904, 19,849 CCs have been invited with 2686 completions (13.5% completion rate). RTI longitudinal staff follow up (Wave 1 respondents): Assisted Living: Out of 447, 358 surveys have been completed (80% completion rate) Nursing Home: Out of 394, 311 surveys have been completed (78.9% completion rate).

DLH:
Home Care: Out of 300 agencies, 41 completed admin surveys, 712 staff rostered, 259 staff sampled and 49 staff surveys completed (18.9% completion rate). For the Direct Care Worker sample, out of 500 workers, 131 completed the survey (26.2% completion rate).

*Related to Wave 3 (September - August 2026): We are currently preparing for W3 (data collection starting in late Spring 2026). Preparations include updating the AL and HC sample frame and defining a new sample of Community Clinicians who focus more on dementia patients. Wave 3 survey specifications have been completed for Assisted Living/Nursing Home/Home Care admin and staff survey instruments as well as Community Clinician survey and PAPI instruments. Currently completing specifications for Assisted Living and Nursing Home Reinterview Admin and Staff surveys. PDMG has also worked closely with UM SpanTran to get any new questions/instructions translated into Spanish and are working with the data collection partners in the preparation, development and review of survey instruments, respondent materials and data collection protocols for the NDWS IRB Sub#9 Submission (01.23.26).

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

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

Project Name	**(NYCHVS) New York City Housing and Vacancy Survey (On Track)**
Project Mode	Primary: Face to Face
Project Type	Sponsored Projects
Budget	**Direct Budget**: 9,926,188.00 **Indirect Budget:** 3,573,427.00 **Total Budget:** 13,499,615.00
Principal	Elyzabeth Gaumer, PI (NYC Housing Preservation Dept)
Investigator/Clients	Daniel Goldstein, Co-PI (NYC Housing Preservation Dept)
	Caitlin Waickman, Co-PI (NYC Housing Preservation Dept)
Funding Agency	
IRB	*HUM#:* *Period of Approval:*
Project Team	*Project Lead:* Maureen Joan O'Brien
	Budget Analyst: Cindy Tsao
	Production Manager: Theresa Camelo
	Senior Project Advisor: Stephanie A Chardoul
	Production Manager 1: Saray Gonzalez
	Production Manager 2:
Proposal #	no data
Description	The New York City Housing and Vacancy Survey (NYCHVS) is a citywide survey designed to be representative of the NYC housing stock and community-dwelling population. The NYCHVS has been conducted by the City of New York since 1965 and is the longest running housing survey in the country. The survey is mandated by New York State and New York City laws to measure the net rental vacancy rate and describe the supply, condition, and continued need for rent control and rent stabilization which covers half of the city's rental housing or about 1 million apartments and 2.5 million tenants. The 2026 NYCHVS will be the 20th survey cycle. Microdata are publicly available and facilitate a variety of analyses on the housing supply, demographic change, economic conditions, and the context for various public policies and programs.
SRO Project Period	01/2025 - 06/2028
Data Col Period	02/2026 - 08/2026
Security Plan	NA

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

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

Report Period	Dec, 2025 (NYCHVS)	Implementing
Risk Level	On Track	
Monthly Updates	Sampling: We continue to QC sample addresses in which the PAD file (NYCHVS Admin file) does not match the MSG file. 2 TLs are QC'ing the file attempting to identify unit numbers via an Accurint search, then an internet search. There are 1,001 sample addresses to start. Recruitment & Hiring: As of now 33 of 210 Iwers have dropped and 177 remain. This includes 3 on-staffers and 5 travelers. We are unsure if and how often travelers will be called in to travel. Iwers completed Registration on Jan 8 and were	

provided with laptops to complete their virtual training sessions.
Training:
Iwer Training is scheduled for Jan 20 in NYC. There will be two trainings, back-to-back, 4 days each. Iwers will travel to the training daily. Iwers have completed GIT Home Study, Study Specific Home Study including watching interactive videos, attending live Zoom sessions, and reviewing the Iwer Training Manual. Iwers will be select NYCHVS clothing at Training. Clothing and NYCHVS backpacks were ordered by HPD and include the HPD, NYC, and U-M logo.
Training materials are and sessions have been finalized.
Blaise:
The Blaise instrument has been finalized and frozen for production, in all seven languages.
MSMS/Nautilus:
The MSMS Training project is ready for training. Nautilus development is significantly behind schedule, as Config testing was set to start in September, 2025. Tech teams are working hard to finish development of the system so it will be ready for production launch on 1/28. Iwers will sync each night while at training so that they can pick up updates, and sample on 1/28.
Other Technical Updates:
We are working on the Utility data collection plan. It has been specced in Blaise, but will not be implemented until the protocol is final and approved by IRB. We are working with IRB on a plan for implementation as too many participants could put exempt IRB status at risk.
QC: We are finalizing plans for English and non-English language Verification and Evaluation. Verification: Verification will not be done with vacant units since they will be verified 100% for vacancy status. For occupied units, we will attempt to verify all languages via a web survey sent via text. We will likely select another case for non-responders. Evaluation: English and SPN evaluations will be completed as usual. For the other 5 languages, we are considering an LLM to check for verbatim. If any cases are flagged for not being read verbatim, we will reach out to graduate students or other Language Line at U-M.

Other:
We have received IRB exempt status approval as well as an NIH CoC.

Special Issues	The iw will be formally conducted in 7 languages. QC and RCT follow-up protocols will be determined. In addition to the 7 lang, we will need to be prepared to interveiw in any language the R speaks. The PI team has stated that an interview has never been conducted in a language that was not listed on their laminated Language Card (n=60 languages), and most times an Iwer has been staffed who spoke the language.

Cost as of Jan 13, 2026		
	Total Cost to Date (direct + indirect):	1,965,371.31
	Est Cost at Completion (E$AC):	13,154,161.26
	Total Budget:	13,499,615.00
	Variance (Total Budget minus- E$AC):	345,453.74
	Reason for Variance:	We continue to assess needs for training staffing in January 2026. This underrun will likely be used for that as well as possible additional costs related to language QC.

Projections as of Jan 13, 2026		
	Dollars Projected for Month:	560,219.16
	Actual Dollars Used:	336,631.25
	Variance (Projected minus Actual):	223,587.91
	Reason for Variance:	Non-salary costs did not hit. Moved projections forward.

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

Other Measures

Project Name	(PR-PSID) Puerto Rico Panel Study of Income Dynamics (Some Concerns)		
Project Mode	Primary: Face to Face Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 1,938,020.00	**Indirect Budget:** 1,085,288.00	**Total Budget:** 3,023,308.00
Principal	Narayan Sastry (University of Michigan)		
Investigator/Clients	Elizabeth Fussel (Brown University)		
Funding Agency	NICHD, with supplemental funding being sought from NIA		
IRB	*HUM#:* HUM00197300		*Period of Approval:* 4/5/2022-3/22/24
Project Team	*Project Lead:* Camila Kendall		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Camila Kendall		
	Production Manager 2:		
Proposal #	no data		
Description	SRO will work with the PIs and a local survey firm in Puerto Rico, Estudios Técnicos (ETI), to develop a sample frame, sample design, questionnaire and data collection protocols for both pilot data collection (in 2022) and baseline data collection (in 2023). DMSS will provide assistance with sample design and implementation, responsive design, panel maintenance issues, and creation of sample weights. SRO will update the PSID-21 Spanish instrument for use specifically in PR. SRO will assist with the preparation of training materials for Listing training, Pretest and Main Data collection and will travel to PR to be on-site for these trainings. SRO will define reports for production and quality control monitoring that will be programmed through the SurveyTrak system, and train the research team on using these reports. All data will be collected by ETI's interviewers in PR and will be encrypted and transmitted daily via SurveyTrak to a secure SRC server. SRO will also assist with data processing.		
SRO Project Period	01/2022 - 12/2023		
Data Col Period			
Security Plan	NA		

Milestones	*Pre Production Start:* 10/01/2021	*Pretest Start:* 02/05/2024
	Pretest End: 03/11/2024	*Recruitment Start:*
	Staffing Complete:	*GIT Start:* 01/30/2024
	SS Train Start: 01/31/2024	*SS Train End:* 02/02/2024
	DC Start:	*DC End:*

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

Report Period	Dec, 2025 (PR-PSID)	Implementing
Risk Level	Some Concerns	
Monthly Updates	Remotely trained 9 new interviewers on recruitment and completing suspended interviews (after the Family Listing) in November. Current staffing: 10 Recruitment IWERs, 8 fully trained IWERs.	

IWER hours have been significantly lower than expected -- Only 58% of hours projected were actually worked in Oct - Nov.

SRO prepared a budget estimate for a third in-person training in early 2026. Additional funding would need to be secured for both ETI and SRO in order to hold this training.

SRO is planning a remote training in early February, to train the 10 recruitment interviewers on the Family Listing protocols.

Special Issues	Projected overrun. Iwer hours are significantly lower than projected.	
Cost as of Jan 16, 2026	*Total Cost to Date (direct + indirect):*	1,318,356.15
	Est Cost at Completion (E$AC):	3,405,491.49
	Total Budget:	3,023,308.00
	Variance (Total Budget minus- E$AC):	-382,183.49
	Reason for Variance:	Working with the PIs to address the overrun. In September, SRO took over the two PSID PGs, totaling $1.7M, which increased the project budget to $3.2M. Budget now includes additional projections for U-M PI, Financial Analyst, and the most recent ETI budget request.
Projections as of Jan 16, 2026	*Dollars Projected for Month:*	125,782.90
	Actual Dollars Used:	63,376.34
	Variance (Projected minus Actual):	62,406.56
	Reason for Variance:	November ETI Invoice had not been processed yet -- projections were moved forward.

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

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

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

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

Report Period	Dec, 2025 (PSID TAS 2025)	Implementing
Risk Level	On Track	
Monthly Updates	December Update Data Collection: - Data collection officially launches on November 10. Through the end of Deember the project's RR is at 66% with Standard release cases having 1015 total iws (67% RR) and Limited release cases having 508 total iws (64% RR).	

- Web Special offer started on 12/09. This increased the TOA by $20 for a total of $100. This offer ends on 1/4/2026. Text, email, and a New Year's postcard will be sent to remind respondents of the offer.

Staffing:
-Recruitment of 11 total SSL STs, which includes 4 TLs, 2 Locators, and 5 interviewers. The project plans to bring on 2 additional TLs and 6 iwers during a January training.

Technical:
- During text message delivery (pooled task), MSMS assigned duplicate Text Message tasks to multiple interviewers who, around the same time, selected "Get Next Case." Because each interviewer received the same task, the SID histories showed no prior text had been sent, prompting each to send a message. As a result, 117 SIDs received more than one text message. An MSMS update is planned to address the problem in early 2026, before NR calling begins. Planning to watch the start of NR calling with pooled delivery closely, since this issue is difficult to reproduce.
- Added cell phone masking for specific phone fields, allowing proper AmCon conventions for copying phone numbers directly from DCA (+1 w/ no additional characters).
- RND continues to save IWER effort for sending text messages. Currently, 7% (n=47) of cases not in the RND protocol receive weekly system text messages.

Management
- The IRB acknowledged two project ORIOs this wave. One for technical issues encountered when adding locating leads to the Web interview for TAS 2021 and TAS 2023. CP will be paid their locator TOA ($10-$20) in November 2025. The second was submitted due to the pooled delivery of text messages, sending duplicate text messages to Rs.

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

Special Issues		
Cost as of	**Total Cost to Date (direct + indirect):**	269,916.19
	Est Cost at Completion (E$AC):	1,264,767.40
	Total Budget:	1,277,930.00
	Variance (Total Budget minus- E$AC):	13,162.60
	Reason for Variance:	Technical costs are less than projected.
Projections as of	**Dollars Projected for Month:**	126,289.14
	Actual Dollars Used:	106,815.20
	Variance (Projected minus Actual):	19,473.94
	Reason for Variance:	The projected direct cost at completion decreased by ($14.4k) between the Nov. and Dec. reports. This was largely due to data collection ($6.3k) and technical ($6.3k) hours being less than projected.

Measures		Units at Complete	RR	HPI
	Current Goal:	1854	65%	
	Goal at Completion:			
	Current Actual:	1523	64%	
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	**(PSID25) Panel Study of Income Dynamics Core 2025 (On Track)**		
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 5,003,388.00	**Indirect Budget:** 2,801,897.00	**Total Budget:** 7,805,285.00
Principal	Tom Crossley (UM-SRC-PSID)		
Investigator/Clients	Noura Insolera (UM-SRC-PSID)		
	Esther Friedman (UM-SRC-PSID)		
Funding Agency	NSF, NIA, NICHD		
IRB	*HUM#:* HUM00062417		*Period of Approval:*
Project Team	*Project Lead:* Rachel Anne Orlowski		
	Budget Analyst: William Lokers		
	Production Manager: Stacy Quisenberry		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Camila Kendall		
	Production Manager 2: Daric Thorne		
Proposal #	no data		
Description	The Panel Study of Income Dynamics (PSID--also known to Respondents as the Family Economics Study or FES) is a longitudinal survey of several thousand individuals and their families, carried out since 1968 and conducted every two years. The sample is comprised of respondents from the 4,800 original families as well as new (immigrant) sample added in 1997/1999 and 2017/2019. The total 2025 sample size will be approx. 11,200, with approx. 10,000 completed interviews expected. Most of the information collected is about family composition and changes (marriages, divorces, births, deaths, people moving in and out); income sources and amounts; employment and pensions; and wealth. There are also questions about housing; education; vehicles; health; fertility; COVID-19; and money spent on food, healthcare, and school. The main focus is on how these family composition and financial factors interact with each other and how they change over time. The survey will be administered via web and telephone, with the expectation that more surveys will be completed via web than telephone. Talk about ancillary studies here. The 2023 waves of CDS and the Transition into Adulthood (TAS) will follow PSID Core data collection. CDS and TAS eligibility is dependent upon completion of PSID Core.		
SRO Project Period	03/2024 - 09/2026		
Data Col Period	03/2025 - 12/2025		
Security Plan	NA		
Milestones	*Pre Production Start:* 03/01/2024		*Pretest Start:* 09/16/2024
	Pretest End: 10/06/2024		*Recruitment Start:* 10/18/2024
	Staffing Complete: 11/25/2024		*GIT Start:*
	SS Train Start: 02/24/2025		*SS Train End:* 06/10/2025
	DC Start: 03/10/2025		*DC End:* 12/31/2025
Other Project Team Members	TSG Tech Leads - Jim Rodgers, Jeff Smith, & Karl Dinkelmann; Data Manager - Brad Goodwin & Ed Green; 68ID Site Programmer - Ashwin Dey & Holly Ackerman; Blaise Programmer - Jude Perillo; MSMS Programmers - Pam Swanson, Darnell Christian, & Holly Ackerman; Tech Support - David Bolt & Kyle Goodman; Tech Design/Testing - Sarah Broumand & Jaime Koopman; Production Support: Lorraine Bird; Project Support: Saujanya Acharya, Janet McBride, & Xiomara Lorenzo-Guerra; Reporting, Mapping, & Sample Assignment: Ji Qi, Minako Edgar, Saujanya Acharya, & Wen Chang		
Other Project Name	FES, Family Economic Study, PSID Core 2025		
Sample Mgmt System	MSMS; Project specific system (68ID Site)		
Data Col Tool	Blaise 5		
Hardware	Laptop; [UM cell] Phone		
DE Software	N/A		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, Other (Locator, Proxy)		
Administration	ISR Group (PSID)		
Payment Type	Check, post (Varies); Cash, post (Varies); Other (electronic, post--JP Morgan)		
Payment Method	Check through other system (PSID will handle check & e-payment via RAPS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (PSID will handle check & e-payment via RAPS)		

Report Period	Dec, 2025 (PSID25)	Implementing

Risk Level	On Track

Monthly Updates	Summary of Nov & Dec Activities:

Tech:
MSMS - Work on L1/L2 cases continued, but most issues relating to the locator payments for 2025 were largely resolved. Towards the end of November, we began processing L1/L2 payments for the PSID Study Staff to process. We began updating MSMS to prepare for the final End of Data Collection periods which began 11/17. Some issues relating to emails sent by Locators to Iwers through MSMS not working were identified, but further investigation were not able to reproduce the reported problem. During the Thanksgiving holiday break, a replication issue which resulted in PQT being significantly behind in reporting was identified but corrected. ODS update occurred in the middle of December without significant incident. Tech team began preparing for the close out of the project on the 2nd of January - planning the portal being closed, review/code out processes, final payment needs, and trainings for TLs who would be working the partial/code out process after the project closed. Some minor, edge cases technical issues occurred on cases that were resolved - a case have two web survey tasks, a line needing the CS done by CATI, a Flag for Staff Review scenario that needed to be reset - but these were handled and cases returned to active.

Blaise - Found an issue where Iwers were entering dashes in Blaise, causing a downstream issue for RPay entries by the PSID Study staff. An issue with how splitoffs are treated resulted in a Respondent refusing to participate, leading to some useful discussion about how splitoffs should be handled in the instrument - how and when they should be available for Web. Continued to review 1001 Review Wrong Age Name cases, and worked through possible bug fixes that could be implemented ahead of 2027 without implementing them now - just to be ready should funding and programmer availability align.

68-ID Site - Some mild edge case scenarios relating to MSMS duplicate WebSurvey tasks on a line caused some temporary confusion which was resolved.

Sample Release / Interventions:
Eng Web Rel 5 began the End game period on 9/24, and ended on 11/5. We achieved a 93% RR (Goal was 91%). Eng CATI Rels 1 and 2 Endgame period began on 10/8 ended on 11/20. We achieved a 57% RR for Eng CATI Rel 1 (Goal was 57%), and a 58% RR for Eng CATI Rel 2 (Goal was 58%). All other CATI releases, Spanish Releases, Eng Web Rel 3 (cases related to Spanish releases), and Splitoffs began Endgame on 11/17 and ended on 12/31. All of these final releases exceeded their goals.

The project concluded production with an 88% response rate (not including expected partial interviews), which exceeds what was achieved in 2021 and 2023.

TLs/PCs will close out partials and finalize all interim lines in January.

Other Activities:
Submitted budget for 2027 wave of Core PSID to PIs.
AI focus group report was delivered to PIs.
Occupation and Industry coding continued in the SSL. Completed second editing priority batch in mid-November. Additional Occupation and Industry coding sample was delivered in December.

Special Issues		
Cost as of Jan 21, 2026	*Total Cost to Date (direct + indirect):*	7,005,889.21
	Est Cost at Completion (E$AC):	7,477,991.41
	Total Budget:	7,805,285.00
	Variance (Total Budget minus- E$AC):	327,293.59
	Reason for Variance:	Less sample than budgeted. Higher percentage of web completes than budgeted. Removed costs associated with new hires and in-person training. Interviewers' and survey specialists/directors' rate was higher than budgeted. Designed data collection and training differently than budgeted. PIs desire to keep the underrun (~$245K direct).
Projections as of Jan 21, 2026	*Dollars Projected for Month:*	421,919.78
	Actual Dollars Used:	358,992.04
	Variance (Projected minus Actual):	62,927.74
	Reason for Variance:	With the holidays and fewer issues than anticipated, Ann Arbor staff worked less than projected. Almost half of the variance is due to some recharges not hitting as projected.

Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:	9994	89%	4.73
	Current Actual:	9081	88.0	5.2
	Estimate at Complete:	9080	88%	5.2
	Variance:	914	1%	-0.47

Other Measures

Note: Current actual metrics based on the Dashboard with the week ending on 1/3/26 (Eligible sample as of 1/3/26: 10,318). Goal at Completion is taken from the budget, which assumes 11,229 interviews will be attempted. Monitored 2025 production against the 2023 production curves for comparable sample releases.

		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:	9994	89%	4.73

Project Name	**(SAFEGUARD) SAFEGUARD (On Track)**		
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 2,200,871.00	**Indirect Budget:** 1,232,489.00	**Total Budget:** 3,433,360.00
Principal	Vincent Capaldi (Uniformed Services University)		
Investigator/Clients	Sarah Maggio (Uniformed Services University)		
Funding Agency	Department of Defense, Office of the Assistant Secretary of Defense for Health Affairs (within DHA), through the Uniformed Services University of the Health Sciences (USUHS)		
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Daniel Tomlin		
	Budget Analyst: William Lokers		
	Production Manager:		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	SAFEGUARD is a study designed to test targeted interventions for preventing harmful behaviors and reducing suicide among service members. SAFEGUARD is composed of 3 components: Life Skills Training, Life Force, and Pathfinding. Each component will have a Baseline survey followed by a follow-up survey:		
	Life Force Baselines will begin in July, continue for 1 year and will be followed by a 3 month and 6 month follow-up survey.		
	Pathfinding Baselines will begin in mid-August, continue for 2 years and will be followed by a 6 month and 12 month follow-up survey.		
	Life Skills Training Baselines will begin in October, continue for 1 year and will be followed by a 1 month, 3 month, and 6 month follow-up survey.		
	SRO will program technical systems and instruments for all 3 components at the Baseline phase. Life Force and Life Skills Training surveys will be completed via web and WSMS. Pathfinding surveys will be completed via phone and WSMS. SRO will use MSMS and Blaise to collect data for the follow-up surveys for all 3 components. Follow-up surveys will start via web and then non-responders will be contacted by the SRO SSL to complete their surveys by phone. Baseline production will start in July of 2025 and Follow-up production will begin in October of 2025.		
SRO Project Period	01/2025 - 01/2029		
Data Col Period	07/2025 - 11/2028		
Security Plan	NA		

Milestones			
	Pre Production Start: 01/06/2025	*Pretest Start:*	
	Pretest End:	*Recruitment Start:*	
	Staffing Complete:	*GIT Start:*	
	SS Train Start: 02/17/2026	*SS Train End:* 02/19/2026	
	DC Start: 12/08/2025	*DC End:*	

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

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

Report Period	Dec, 2025 (SAFEGUARD)	Planning
Risk Level	On Track	
Monthly Updates	November and December were heavily focused on MSMS work in preparation for follow-up launches in January. LST was able to launch on a small scale in early December, while Life Force launched in early January. Pathfinding has still been under development and a launch date has not been defined.	
Special Issues		

Cost as of Jan 18, 2026	*Total Cost to Date (direct + indirect):*	821,889.59
	Est Cost at Completion (E$AC):	3,204,004.48
	Total Budget:	3,433,360.00
	Variance (Total Budget minus- E$AC):	229,355.52
	Reason for Variance:	The projected underrun is due to the removal of the PDMG resource which was originally budgeted before scope changes. Since last spring, many pieces have changed including a reduction in sample size compared to what was original budgeted in the proposal.
Projections as of Jan 18, 2026	*Dollars Projected for Month:*	135,732.36
	Actual Dollars Used:	119,496.47
	Variance (Projected minus Actual):	16,235.89
	Reason for Variance:	We needed to push SSL hours forward again due to a delay in the launch. This cut some hours from our budget. I expect an uptick in hours for the coming months with the MSMS work for the follow-up surveys.

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

Project Name	**(SCA Web 2025) SCA Web 2025 (On Track)**
Project Mode	Primary: Web Total of Modes: 1
Project Type	Sponsored Projects
Budget	**Direct Budget**: 136,554.00 **Indirect Budget:** 0.00 **Total Budget:** 136,554.00
Principal	Joanne Hsu (Survey of Consumers - ISR)
Investigator/Clients	Tuba Suzer Gurtekin (Survey of Consumers - ISR)
Funding Agency	
IRB	*HUM#:* Exempt *Period of Approval:*
Project Team	*Project Lead:* William Keating
	Budget Analyst: Dean E Stevens
	Production Manager:
	Senior Project Advisor: Nicole G Kirgis
	Production Manager 1:
	Production Manager 2:
Proposal #	no data
Description	SCA Web is the latest iteration of data collection for the Survey of Consumers. All data collection is done through an online survey. SRO responsibilities include setup/support of technical systems, coding answers to open ended questions, and general project management support. SCA Web maintains an Exempt IRB status.
SRO Project Period	01/2025 - 12/2025
Data Col Period	
Security Plan	NA

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

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

Report Period	Dec, 2025 (SCA Web 2025)	Initiation
Risk Level	On Track	
Monthly Updates	During the December 2025 calendar month, SCA coding processed 1,058 cases with an additional 127 cases for IRR (total of 1,185 cases, 10.7% of cases selected for check coding).	

Overall, coder efficiency in December was 4.7 minutes per case.

Coding in December included fewer days due to a holiday break. After the break, 3 coders are scheduled to accommodate a build up of cases.

Special Issues	Kelly Lieske began attending meetings as part of the onboarding process to take over for Peter.	
Cost as of Jan 18, 2026	*Total Cost to Date (direct + indirect):*	115,102.77
	Est Cost at Completion (E$AC):	115,102.77
	Total Budget:	136,554.00
	Variance (Total Budget minus- E$AC):	21,451.23
	Reason for Variance:	The project closes the 2025 calendar year with an overall underrun due to fewer charges associated with programming/technical support.
Projections as of Jan 18, 2026	*Dollars Projected for Month:*	10,054.88
	Actual Dollars Used:	8,194.20
	Variance (Projected minus Actual):	1,860.68
	Reason for Variance:	Programming/technical support costs came in lower than projected, and coding costs came in slightly under projections.

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

Project Name	**(SRS 2021) Social Relations 2023 (On Track)**		
Project Mode	Primary: Face to Face Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	**Direct Budget**: 3,937,057.11	**Indirect Budget:** 2,204,753.00	**Total Budget:** 6,141,810.11
Principal	Toni Antonucci (ISR)		
Investigator/Clients	Kristine Ajrouch (ISR)		
	Laura Zahodne (ISR)		
Funding Agency	NIH		
IRB	*HUM#:* HUM00187453		**Period of Approval:** 8/7/2024 - 8/6/2025
Project Team	*Project Lead:* Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Taghreid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 3400 interviews with respondents aged 35 years or older residing in the tri-county area of Southeast Michigan (Wayne, Oakland and Macomb counties) and 244 interviews with original Social Relations panel sample members aged younger than 65 years of age. The project involves screening up to 6900 new sample lines., with one selected respondent per household. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements (height, weight, blood pressure, grip strength) and saliva collection. The SRS 2023 project will use the same instrument programmed for the D-Amp project, with the only new programming being that for a screener. The screener will be translated into Arabic. No informant or proxy interview is included in the project scope. Interviews will be conducted in English or Arabic.		
SRO Project Period	09/2021 - 05/2023		
Data Col Period	05/2023 - 01/2025		
Security Plan	NA		

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

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

Report Period	Dec, 2025 (SRS 2021)	Closing
Risk Level	On Track	
Monthly Updates	The project team continued to work on weights, the sampling report and the final report. The final set of weights ws delivered at the end of October. The SRO team is continuing to work on the Sampling report and the final report.	
	The final project report and weighting report is still outstanding.	

Special Issues

Cost as of Jan 18, 2026	Total Cost to Date (direct + indirect):		6,139,319.99
	Est Cost at Completion (E$AC):		6,141,092.08
	Total Budget:		6,141,810.11
	Variance (Total Budget minus- E$AC):		718.03
	Reason for Variance:	The variance is insignificant. We do expect the use most of the project budget.	
Projections as of Jan 18, 2026	Dollars Projected for Month:		1,382.81
	Actual Dollars Used:		1,142.73
	Variance (Projected minus Actual):		240.08
	Reason for Variance:	Work on the project reports was delayed.	

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

Other Measures

Project Name	(STARRS-LS 2020-2025) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study (On Track)
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects
Budget	**Direct Budget**: 8,809,515.00 **Indirect Budget:** 4,920,601.00 **Total Budget:** 13,730,116.00
Principal	James Wagner (University of Michigan)
Investigator/Clients	Robert Ursano (Uniformed Services University of the Health Scienc)
	Murray Stein / Ron Kessler (University of California San Diego / Harvard)
Funding Agency	Department of Defense
IRB	*HUM#:* HUM00180765 **Period of Approval:** 3/21/24 - 3/20/25
Project Team	*Project Lead:* Meredith A House
	Budget Analyst: William Lokers
	Production Manager: Ruth B Philippou
	Senior Project Advisor: Lisa S Holland
	Production Manager 1: Jeffrey Albrecht Jr
	Production Manager 2: Lisa M Lewandowski-Romps
Proposal #	no data
Description	This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.

For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data.

To date, we have completed 4 waves of STARRS-LS interviewing. During Wave 1, we attempted to contact 50,000 individuals and completed approximately 14,500 full interviews. All Wave 1 participants that completed a full Wave 1 interview were asked to participate in Waves 2, 3 and 4.

In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys). |
SRO Project Period	05/2020 - 02/2025
Data Col Period	11/2022 - 04/2024
Security Plan	Yes

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

Other Project Team Members	Ryan Yoder, Keith Liebetreu, Becky Loomis, Steven Sonoras, iAn Woods, Andrew Piskorowski, Asia Paige, Ji Qi, Makenna Harrison, Lamont Manley, Lisa Van Havermaet, Stephanie Windisch, Karl Dinkelmann, Peter Sparks. Shane Empie, Pam Swanson, Jim Rodgers, Marcus Blough, Ricardo Rodriguez, Pete Westhead

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

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

Report Period	Dec, 2025 (STARRS-LS 2020-2025)	Closing
Risk Level	On Track	
Monthly Updates	See STARRS-LS 2025-2030	
Special Issues	See STARRS-LS 2025-2030	
Cost as of Dec 31, 2025	*Total Cost to Date (direct + indirect):*	13,735,919.60
	Est Cost at Completion (E$AC):	13,735,919.60
	Total Budget:	13,730,116.00
	Variance (Total Budget minus- E$AC):	-5,803.60
	Reason for Variance:	-$5,803.60 remains to be transferred to Year 6 account/ first year of the new 2025-30 award period.
Projections as of Dec 31, 2025	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	524.35
	Variance (Projected minus Actual):	-524.36
	Reason for Variance:	There are a few charges (mostly non-salary) still hitting the 2020-2025 accounts. All remaining charges need to be transferred to the new 2025-30 award period.

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

Project Name	**(STARRS-LS 2025-2030) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study (On Track)**
Project Mode	Primary: Web Secondary: Telephone Total of Modes: 2
Project Type	Sponsored Projects
Budget	**Direct Budget**: 9,496,682.00 **Indirect Budget:** 5,279,479.00 **Total Budget:** 14,776,161.00
Principal 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	**Project Lead:** Meredith A House
	Budget Analyst: William Lokers
	Production Manager: Ruth B Philippou
	Senior Project Advisor: Lisa S Holland
	Production Manager 1: Jeffrey Albrecht Jr
	Production Manager 2: Lisa M Lewandowski-Romps
Proposal #	no data
Description	This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.

For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data.

To date, we have completed 4 waves of STARRS-LS interviewing. During Wave 1, we attempted to contact 50,000 individuals and completed approximately 14,500 full interviews. All Wave 1 participants that completed a full Wave 1 interview were asked to participate in Waves 2, 3 and 4. We will attempt to reinterview that same sample in Waves 5 and 6, which are covered in this project listing.

In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys). |
SRO Project Period	03/2025 - 02/2030
Data Col Period	11/2024 - 04/2026
Security Plan	NA

Milestones			
	Pre Production Start: 04/01/2024	**Pretest Start:**	
	Pretest End:	**Recruitment Start:** 08/19/2024	
	Staffing Complete: 10/29/2024	**GIT Start:** 11/12/2024	
	SS Train Start: 11/21/2024	**SS Train End:** 11/26/2024	
	DC Start: 11/11/2024	**DC End:** 05/03/2026	

Other Project Team Members	Ryan Yoder, Keith Liebetreu, Becky Loomis, Steven Sonoras, iAn Woods, Andrew Piskorowski, Asia Paige, Ji Qi, Makenna Harrison, Lamont Manley, Lisa Van Havermaet, Stephanie Windisch, Karl Dinkelmann, Peter Sparks. Shane Empie, Pam Swanson, Jim Rodgers, Marcus Blough, Ricardo Rodriguez, Pete Westhead
Other Project Name	STARRS-LS Waves 5, 6
Sample Mgmt System	MSMS
Data Col Tool	Blaise 5
Hardware	Laptop; Desktop
DE Software	N/A
QC Recording Tool	DRI-CARI
Incentive	Yes, R

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

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

Monthly Updates (continued)

Project Management and Planning:
• Budget/Funding:
o We continued to move hours and costs from the Year 5 to Year 6 accounts. After all of the costs are moved appropriately, it will bring the Year 5 (and 2020-2025 5-year budget period) to a zero balance and we will be able to close it out.
o We awaited news on funding for Year 7. The Year 7 POP will cover 12 months, January 2026-December 2026.
• IRB:
o Amendments to add Dr. Benedek as USUHS PI and Dr. Naifeh as Co-PI:
? Wave 5 IRB protocol – USUHS concurrence letter was received on December 22.
? HADS IRB protocol – USUHS concurrence letter was received on December 17.
? LS IRB protocol (W1, W2) – continued under review at USUHS.
• We continued participation in discussions and information sharing related to the biosample inventory at Sampled (Rutgers).
• We sent weekly production updates to the PIs, and reported on progress on the call with the Army/M&RA.
• Meredith created the agenda/notes and facilitated the weekly meeting with the STARRS project managers.

Enclave and User Support:
• Annual Enclave security training: U-M distributed 2026 training renewal materials to enclave users on December 5. Completed trainings are due by the end of January.
• Annual IA security review: December 17, Ms. Mayfield at AAG emailed Scott and the group suggesting we plan for a meeting in January.
• Annual NDI Data Request (2025 request for data through 2023):
o Confidentiality agreements (re-signed with wet ink):
? OASD-HA: Dr. Issa sent their completed wet-ink signature form to U-M on December 11.
? UCSD: UCSD's IT security group requested that Dr. Stein complete a NIH Dataset NIST 800-171 Compliance Intake Form for the U-M systems (Enclave). UCSD is navigating newly required NIST 800-171 standards for NIH datasets and, although UCSD will not receive NDI on their servers, the CDC has guided us to answer "Yes" to receiving identifiable data because potentially identifying data will be accessed on the U-M Enclave by STARRS analysts. U-M will complete this form in the New Year. Meredith informed Dr. Stein of the timing.
o We received USUHS concurrence letters for the LSW5 and HADS IRB amendments for the USU PI change.
• Collaboration with ORISE fellow, Dr. Dias, working with Dr. Jarvis of Army G-9/DPRR:
o Dataset export:
? U-M vetted and packaged the PI-approved export. Files were made available to Dr. Dias. U-M provided Dr. Dias with the password needed to retrieve the export from DODSAFE on December 18.
o U-M Enclave onboarding:
? The U-M data security team confirmed that direct connections to the enclave are not permitted using personally-owned equipment. Equipment issued and maintained by an organization is a security requirement for connecting to the enclave. This STARRS security protocol is informed by both best practices and the project's work with the Army Analytics Group (AAG). Dr. Dias conferred with her supervisor to see if a different organizationally-managed computer could be secured for her use in order to meet this requirement.
• Standard enclave activities continued. These include maintaining security requirements; processing background checks and Great Lakes Cluster (GLC) user access requests, drop box requests, ID swap and data transfer requests; managing software acquisition and updates; and providing user support as needed. Of particular note this month:
o The team made plans for the upgrade of one of our SQL servers and for one of the enclave's Windows terminal servers.
o In addition to Dr. Dias's onboarding, we monitored the onboarding process for a Harvard analyst and two U-M IT staff members.
o We monitored offboarding for one U-M staff member.
o The DUA was completed for an enclave user who changed institutions; U-M reactivated his enclave account.
o We continued coordination with USUHS on tracking updates to DUA extensions with external collaborators.
• Biomarker group request for assistance:
o Diagnostic and sociodemographic data sharing with DHA (Dr. Evatt):
? We awaited DUAs for two of Dr. Evatt's analysts ahead of onboarding them to the enclave.

Public Use Data:
• We assisted a researcher from University of Texas, El Paso with questions about the application process for gaining access to data at ICPSR.
• We monitored progress of the research team at University of Alabama, who have requested biosamples from Sampled (Rutgers).
o December 18, the Alabama team sent Sampled the list of 60 RUIDs for which they would like to receive blood samples. Alabama and Sampled exchanged emails about the signed proposal and PO.
• We awaited information from ICPSR about what gradual phase out of the Virtual Data Enclave (VDE) option would involve. James and Meredith will bring this information to the PIs/RT for discussion/consideration.
• We awaited decisions from the Army/GSC on producing the genetic and bioassay files for public use and placing data in the NIH National Data Archive and Public use release for GWAS.

Wave 5 Production Updates:
• Wave 5 production statistics, as of January 1, 2026, are as follows:

o Replicates released: 12 of 14 released with 12,719 sample lines.
o Completed interviews: 8,934 (8,637 web; 297 phone)
o Replicate 10 ended production on December 11 with a final response rate of 73.6%, which was slightly below the average rate.
o By January 1, Replicate 11 had transitioned to Phase 4. The response rate was 60.6% and tracking about 7 percentage points below the average rate.
o By January 1, Replicate 12 was in Phase 2 The response rate was 36.6% and tracking about 4 percentage points below the average rate.
o The response rate for completed replicates (Reps 1-10) is 74.9%.

Safety Plan Results:
• The Wave 5 combined Safety Plan rate was 13.0% as of Jan 1:
o Army Chaplains:
? 2,611 (# started IW), 2,508 (# completed IW), 210 (safety plan checks), 8.0% activation rate
o U-M CCP:
? 6,670 (# started IW), 6,426 (# completed IW), 993 (safety plan checks), 14.9% activation rate

Special Issues	Language in the following area of risk/mitigation strategy in the report to the PIs/research team has been updated since last month: • Year 6 to Year 7 POP transition: o The Year 6 subaward provides 10 months of funding covering March – December 2025. We are currently projected to spend ~$2.8M of the ~3.4M Yr6 funding amount by the end of December. That leaves about $600K to spend, which should take us through most of February. We will need the Year 7 funds will be in place by that time. o We are anticipating a smoother process during the current 5-year award period. As we understand it, USUHS issued the agreement to HJF as a five-year award, so for the next four funding cycles, there will be modifications to the new agreement rather than separate subawards issued each time.

Cost as of Nov 30, 2025		
	Total Cost to Date (direct + indirect):	2,508,570.42
	Est Cost at Completion (E$AC):	14,768,282.22
	Total Budget:	14,776,161.00
	Variance (Total Budget minus- E$AC):	7,878.78
	Reason for Variance:	The projected underrun decreased as we refined projections for staff. Updates to projections for the month included adjustments to staff hours for leave time (reductions) and to smooth out the transition between Waves 5 and 6 (increases). We also removed projected hours for Survey Techs for an attrition training in early 2025 no attrition training will be held).

Projections as of Nov 30, 2025		
	Dollars Projected for Month:	295,561.74
	Actual Dollars Used:	283,326.48
	Variance (Projected minus Actual):	12,235.26
	Reason for Variance:	Savings were largely in the area of Enclave and Management staff hours.

Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:	10,763	74%	18.0
	Goal at Completion:	10,763	74%	18.0
	Current Actual:	8,934	74.9% (Reps 1-10)	18.6
	Estimate at Complete:	10,763	74%	18.0
	Variance:	0	0	0

Other Measures	Stats as of 1/1/26

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**: 1,041,068.00	**Indirect Budget:** 0.00	**Total Budget:** 1,041,068.00
Principal Investigator/Clients	Mark Tessler (University of Michigan)		
Funding Agency			
IRB	*HUM#:* HUM00269204		*Period of Approval:*
Project Team	*Project Lead:* Jeffrey Albrecht Jr		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager: William Keating		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1: Nahid Sultana		
	Production Manager 2:		
Proposal #	no data		
Description	The U-M Wallenberg Institute Student Survey is a longitudinal, web-based survey study of U-M students that investigates experiences with and perceptions of diverse religious and ethnic groups. The broad purpose of the study is to observe how those experiences and perceptions change over the course of students' time at U-M. The study will include a pre-study phase followed by five annual waves of web survey data collection each fall from 2025-2029. The research is being conducted by the Survey Research Operations (SRO) unit at the Institute for Social Research's Survey Research Center on behalf of Mark Tessler and the Wallenberg Institute.		
SRO Project Period	02/2025 - 12/2029		
Data Col Period			
Security Plan	NA		

Milestones	*Pre Production Start:* 02/01/2025	*Pretest Start:* 06/18/2025
	Pretest End: 06/30/2025	*Recruitment Start:* 08/01/2025
	Staffing Complete:	*GIT Start:*
	SS Train Start: 10/03/2025	*SS Train End:* 10/03/2025
	DC Start: 09/25/2025	*DC End:* 11/23/2025

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

Report Period	Dec, 2025 (WalSS)	Closing
Risk Level	On Track	
Monthly Updates	PRODUCTION -Reminder calling concluded on November 21. The SSL made 9,332 calls in total at 17.9 DPH overall. -Data collection closed on November 23 with a 38.9% response rate. RESPONDENT PAYMENTS -Jeffrey and Nahid reconciled the remaining Tango funds. The final token costs were $60,690. This would have been $77,820, if we would have stuck with the original $20 token and not done the token experiment. The tokens ended up costing $15.50, on average. POST-PRODUCTION -Jeffrey, Wen, and Makenna gave a presentation with initial factor analysis results to the Wallenberg Institute.	

-Jeffrey wrote the Wave 1 field methods report and religious identities report.
-Wen and Makenna worked on the frequencies and cross tab reports.

Special Issues	The PIs are considering a ballpark for expanding data collection in Waves 2 -5 to include the Flint and Dearborn campuses in the sample. While they really want to go with the expansion, they currently cannot afford the costs, so they are now reaching out to sponsors to see if they can get additional fundings.
Cost as of Jan 21, 2026	*Total Cost to Date (direct + indirect):* 273,721.69
	Est Cost at Completion (E$AC): 980,368.15
	Total Budget: 1,041,068.00
	Variance (Total Budget minus- E$AC): 60,699.85
	Reason for Variance: The WAISS project budget has been updated in CRS to reflect the full 5-year project, whereas previously we only reported to the Year 1 budget. The Year 1 underrun was $19,899.93 through May 2026. Once we updated to use the full budget and projected to match the proposal budget, the full project underrun is $60,699.85. These funds will be needed to cover the number of tokens paid in subsequent waves, which is larger than proposed due to the success of Wave 1.
Projections as of Jan 21, 2026	*Dollars Projected for Month:* 53,952.02
	Actual Dollars Used: 45,524.76
	Variance (Projected minus Actual): 8,427.26
	Reason for Variance: In November and December, we projected $53,952.02 but only spent $45,524.76. This underrun is due to lower hours charged by the DMSS team than projected, lower fringe benefit charges, and no vacation accrual charges. As noted above, the additional underrun is helpful, as we will need it in subsequent waves. The analysis work that was planned with those funds has been reassigned to create an interactive RShiny report that DMSS is building for the PIs. That report cost $10,000-$12,000 and took a while to get approval from the PIs.

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

Other Measures

Developmental/Initiative Projects Dashboard

NonArchived Development Initiative and No-DataCol Projects

Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
TSME26 APP SECURITY (425196)	Initiatives	Implementing	Carol Lively	☐	☐	☐	☐	☐	☐	🟢	🟢	🟡	🟢	☐	🟢
TSME26 AUTO SCHEDULER (483257)	Initiatives	Planning	Debbie Seale	☐	☐	☐	☐	☐	☐	🟢	🔴	🟢	🟢	🟢	🟢
TSME26 BLAISE FEATURE TESTING (425200)	Initiatives	Initiation	Karl A Dinkelmann	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢	☐	🟢
TSME26 BLAISE PERFORMANCE (423562)	Initiatives	Initiation	Karl A Dinkelmann	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢	☐	🟢
TSME26 DCO SYSTEMS SUPPORT (483248)	Initiatives	Implementing	Vivienne Y Outlaw	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢	🟢	🟢
TSME26 GEOLOCATION (425201)	Initiatives	Initiation	Sarah Crane	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢	☐	🟢
TSME26 LLM RESUME REVIEW (483424)	Initiatives	Initiation	Grant D Benson	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢	☐	🟢
TSME26 LOGGING (483227)	Initiatives	Initiation	Hueichun Peng	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢	☐	🟢
TSME26 MSMS PERFORMANCE (425267)	Initiatives	Implementing	Jim Rodgers	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢	☐	🟢
TSME26 PASSWORD RESET (425197)	Initiatives	Initiation	David Bolt	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢	☐	🟢
TSME26 QC SYSTEMS (483249)	Initiatives	Implementing	Sarah Elisa Broumand	☐	☐	☐	☐	☐	☐	🟢	🟢	🟡	🟢	🟢	🟢
TSME26 RCLS (425198)	Initiatives	Initiation	Hueichun Peng	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢	☐	🟢
TSME26 REPLACE RPAY (423463)	Initiatives	Initiation	Hueichun Peng	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢	☐	🟢
TSME26 SURVEYTRAK MAINTENANCE (483257)	Initiatives	Implementing	Jeffrey L Smith	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢	☐	🟢
TSME26 TEAM LOCATION (424466)	Initiatives	Planning	Mark Simonson	☐	☐	☐	☐	☐	☐	🟢	🟢	🟢	🟢	🟢	🟢

Project Name	**(TSME26 APP SECURITY (425196)) TSME26 APP SECURITY (425196) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 23,000.00	**Indirect Budget:** 0.00	**Total Budget:** 23,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Carol Lively		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Carol Lively		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	TSME26 Project		
SRO Project Period	06/2025 - 06/2026		
Data Col Period			
Security Plan	NA		

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

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

Report Period	Dec, 2025 (TSME26 APP SECURITY	Implementing
Risk Level	On Track	
Monthly Updates	NYCHVS security work is being charged on this account as needed. There has been quite a bit of work done this month securing our solutions and databases that will house NYCHVS data. Expect this to continue another month.	
Special Issues		
Cost as of Jan 18, 2026	*Total Cost to Date (direct + indirect):*	15,402.34
	Est Cost at Completion (E$AC):	23,477.70
	Total Budget:	23,000.00
	Variance (Total Budget minus- E$AC):	-477.70
	Reason for Variance:	na
Projections as of Jan 18, 2026	*Dollars Projected for Month:*	2,668.99
	Actual Dollars Used:	2,760.57

	Variance (Projected minus Actual):			-91.58
	Reason for Variance:	na		

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

Other Measures

	Variance (Projected minus Actual):			-91.58
	Reason for Variance:	na		

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

Project Name	**(TSME26 AUTO SCHEDULER (483257)) TSME26 AUTO SCHEDULER (483257) (On Track)**
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives
Budget	**Direct Budget**: 15,000.00 **Indirect Budget:** 0.00 **Total Budget:** 15,000.00
Principal Investigator/Clients	
Funding Agency	
IRB	*HUM#:* *Period of Approval:*
Project Team	*Project Lead:* Debbie Seale
	Budget Analyst: Nicole Danielle Doher
	Production Manager:
	Senior Project Advisor:
	Production Manager 1:
	Production Manager 2:
Proposal #	no data
Description	SSL Auto Scheduler
SRO Project Period	01/1996 - 01/1996
Data Col Period	
Security Plan	NA
Milestones	*Pre Production Start:* *Pretest Start:*
	Pretest End: *Recruitment Start:*
	Staffing Complete: *GIT Start:*
	SS Train Start: *SS Train End:*
	DC Start: *DC End:*
Other Project Team Members	
Other Project Name	
Sample Mgmt System	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Dec, 2025 (TSME26 AUTO SCHEDULER (483257)) Planning
Risk Level	On Track
Monthly Updates	Due to resource allocation to NYCHVS, we had a delay in completing the Auto Scheduler interface deadline for the next step. Due to the timeline of the schedules, each delay can have up to a month impact to align with the next scheduling period. We still anticipate having the project done by the end of the fiscal year (June 2026) although no longer at our original April 2026 timeline.
Special Issues	
Cost as of Jan 13, 2026	*Total Cost to Date (direct + indirect):* 15,321.56
	Est Cost at Completion (E$AC): 22,443.73
	Total Budget: 15,000.00
	Variance (Total Budget minus- E$AC): -7,443.73
	Reason for Variance: The difference is between the original budget and revised budget after the project started.
Projections as of Jan 13, 2026	*Dollars Projected for Month:* 1,109.90

	Actual Dollars Used:			2,850.33
	Variance (Projected minus Actual):			-1,740.43
	Reason for Variance:	The difference is between the original budget and revised budget after the project started.		

Measures

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

Other Measures

	Actual Dollars Used:			2,850.33
	Variance (Projected minus Actual):			-1,740.43
	Reason for Variance:			

	Current Goal:			
	Goal at Completion:			

Project Name	**(TSME26 BLAISE FEATURE TESTING (425200)) TSME26 BLAISE FEATURE TESTING (425200) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 10,000.00	**Indirect Budget:** 0.00	**Total Budget:** 10,000.00
Principal			
Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Karl A Dinkelmann		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Carol Lively		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	This TSME FY26 initiative allocates some base funds to review the new and recent features added to the Blaise survey platform. One of the key features we have been anticipating for several versions is the initial release of Video Interviewing, which does not seem to have been included in version 5.16. We expect to learn more in September about whether it will be available in the upcoming version 5.17 later this year. Additionally, we plan to evaluate other forthcoming features, including support for Entra (Azure Active Directory), improvements to the Blaise TestSuite, and enhanced logging. The latter two features are also expected to be included in version 5.17.		
SRO Project Period	07/2025 - 06/2026		
Data Col Period			
Security Plan	NA		

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

Other Project Team Members	The Blaise team.
Other Project Name	
Sample Mgmt System	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Dec, 2025 (TSME26 BLAISE FEATURE TESTING (425200))	Initiation
Risk Level	On Track	
Monthly Updates	No new activity in December.	
Special Issues		
Cost as of Jan 18, 2026	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	10,000.00
	Variance (Total Budget minus- E$AC):	10,000.00

	Reason for Variance:	na	
Projections as of Jan 18, 2026	*Dollars Projected for Month:*		0.00
	Actual Dollars Used:		0.00
	Variance (Projected minus Actual):		0.00
	Reason for Variance:	na	

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

Other Measures

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

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

Other Project Team Members	The Blaise Admin team.
Other Project Name	
Sample Mgmt System	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Dec, 2025 (TSME26 BLAISE	Initiation
Risk Level	On Track	
Monthly Updates	No new activity in December.	
Special Issues		

Cost as of Jan 18, 2026	*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 Jan 18, 2026	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	*Project Lead:* Vivienne Y Outlaw		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Carol Lively		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	DCO Systems Support		
SRO Project Period	07/2025 - 06/2026		
Data Col Period			
Security Plan	NA		

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

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

Report Period	Dec, 2025 (TSME26 DCO SYSTEMS ~~SUPPORT (483248))~~	Implementing
Risk Level	On Track	
Monthly Updates	- Worked on FOTY 2026 preparation - Captured the submission of the Remote Equipment Attestation & Request Form (Google Form) in Fred - Modified Laptop Removal Form for SSL	
Special Issues		
Cost as of Jan 13, 2026	*Total Cost to Date (direct + indirect):*	14,989.45
	Est Cost at Completion (E$AC):	21,647.31
	Total Budget:	42,000.00
	Variance (Total Budget minus- E$AC):	20,352.69
	Reason for Variance:	
Projections as of Jan 13, 2026	*Dollars Projected for Month:*	3,225.15

Actual Dollars Used:				1,217.74
Variance (Projected minus Actual):				2,007.41
Reason for Variance:	NA			

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

Actual Dollars Used:				1,217.74
Variance (Projected minus Actual):				2,007.41
Reason for Variance:	NA			

		Units at Complete	RR	HPI
	Current Goal:			

Project Name	**(TSME26 GEOLOCATION (425201)) TSME26 GEOLOCATION (425201) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 15,000.00	**Indirect Budget:** 0.00	**Total Budget:** 15,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Sarah Crane		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Carol Lively		
	Production Manager 1: Elizabeth Ohryn		
	Production Manager 2:		
Proposal #	no data		
Description	Geolocation for Screener Projects		
SRO Project Period	07/2025 - 06/2026		
Data Col Period			
Security Plan	NA		

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

Other Project Team Members	Programmer: Minako Edgar
Other Project Name	
Sample Mgmt System	NA
Data Col Tool	NA
Hardware	NA
DE Software	NA
QC Recording Tool	NA
Incentive	NA
Administration	NA
Payment Type	NA
Payment Method	NA

Report Period	Dec, 2025 (TSME26 GEOLOCATION (425201))	Initiation
Risk Level	On Track	
Monthly Updates	Team continues to meet 2xmonth to refine interface and plan for NYCHVS. MGenX PM provided feedback which will be incorporated, as appropriate.	
Special Issues		

Cost as of Jan 18, 2026	*Total Cost to Date (direct + indirect):*	8,561.16
	Est Cost at Completion (E$AC):	13,661.79
	Total Budget:	15,000.00
	Variance (Total Budget minus- E$AC):	1,338.21
	Reason for Variance: fewer management hours spent so far	
Projections as of Jan 18, 2026	*Dollars Projected for Month:*	2,278.65
	Actual Dollars Used:	1,469.24

| *Variance (Projected minus Actual):* | | | | 809.41 |
| *Reason for Variance:* | | fewer management hours spent so far | | |

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

Other Measures

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

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

Report Period	Dec, 2025 (TSME26 LLM RESUME REVIEW (483424))	Initiation
Risk Level	On Track	
Monthly Updates	No updates as we were unable to get the new Linux NVIDIA box set up to complete additional analysis. We are unlikely to be able to make much progress on this until March due to resource constraints.	
Special Issues		
Cost as of	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	0.00
	Total Budget:	1.00
	Variance (Total Budget minus- E$AC):	0.00
	Reason for Variance:	

Projections as of	Dollars Projected for Month:			0.00
	Actual Dollars Used:			0.00
	Variance (Projected minus Actual):			0.00
	Reason for Variance:			

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

Other Measures

Projections as of	Dollars Projected for Month:			0.00
	Actual Dollars Used:			0.00
	Variance (Projected minus Actual):			0.00

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

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

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

Report Period	Dec, 2025 (TSME26 LOGGING (483227))	Initiation
Risk Level	On Track	
Monthly Updates	On Hold to wait for API librry of Nautilus	
Special Issues		
Cost as of Jan 18, 2026	*Total Cost to Date (direct + indirect):*	2,652.35
	Est Cost at Completion (E$AC):	2,652.35
	Total Budget:	30,000.00
	Variance (Total Budget minus- E$AC):	27,347.65
	Reason for Variance:	NA
Projections as of Jan 18, 2026	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	0.00
	Variance (Projected minus Actual):	0.00

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

Other Measures

Measures		Units at Complete	RR	HPI
	Current Goal:			

	Goal at Completion:			
	Current Actual:			

Project Name	**(TSME26 MSMS PERFORMANCE (425267)) TSME26 MSMS PERFORMANCE (425267) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 100,000.00	**Indirect Budget:** 0.00	**Total Budget:** 100,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Jim Rodgers		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Carol Lively		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	TSME26 project		
SRO Project Period	07/2025 - 06/2026		
Data Col Period			
Security Plan	NA		
Milestones	*Pre Production Start:*		*Pretest Start:*
	Pretest End:		*Recruitment Start:*
	Staffing Complete:		*GIT Start:*
	SS Train Start:		*SS Train End:*
	DC Start:		*DC End:*
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Dec, 2025 (TSME26 MSMS PERFORMANCE (425267))	Implementing
Risk Level	On Track	
Monthly Updates	Ongoing	
Special Issues		
Cost as of Jan 13, 2026	*Total Cost to Date (direct + indirect):*	53,940.80
	Est Cost at Completion (E$AC):	112,932.55
	Total Budget:	100,000.00
	Variance (Total Budget minus- E$AC):	-12,932.55
	Reason for Variance: Variance	
Projections as of Jan 13, 2026	*Dollars Projected for Month:*	8,361.04
	Actual Dollars Used:	8,671.19
	Variance (Projected minus Actual):	-310.15

Measures

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

Other Measures

	Reason for Variance:	Variance		
		Units at Complete	**RR**	**HPI**
	Current Goal:			
	Goal at Completion:			
	Current Actual:			

Project Name	**(TSME26 PASSWORD RESET (425197)) TSME26 PASSWORD RESET (425197) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 5,000.00	**Indirect Budget:** 0.00	**Total Budget:** 5,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* David Bolt		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Carol Lively		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	TSME26 Project		
SRO Project Period	07/2025 - 06/2026		
Data Col Period			
Security Plan	NA		

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

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

Report Period	Dec, 2025 (TSME26 PASSWORD RESET (425197))		Initiation
Risk Level	On Track		
Monthly Updates	Work not starting yet as planned.		
Special Issues			
Cost as of	*Total Cost to Date (direct + indirect):*		0.00
	Est Cost at Completion (E$AC):		0.00
	Total Budget:		5,000.00
	Variance (Total Budget minus- E$AC):		0.00
	Reason for Variance:		
Projections as of	*Dollars Projected for Month:*		0.00
	Actual Dollars Used:		0.00
	Variance (Projected minus Actual):		0.00

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

Other Measures

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

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

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

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

Report Period	Dec, 2025 (TSME26 QC SYSTEMS	Implementing
Risk Level	On Track	
Monthly Updates	Prod03 that houses OLIVE4 is now Encrypted and all OLIVE code was updated to meet security requirements. We are now focusing on additional olive changes such as restricting case veiw by language and some email updates.	
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 100 hours left of programming time to do any modifications.	
Cost as of Jan 18, 2026	*Total Cost to Date (direct + indirect):*	15,321.61
	Est Cost at Completion (E$AC):	29,820.06
	Total Budget:	30,000.00
	Variance (Total Budget minus- E$AC):	179.94

	Reason for Variance:	negligible		
Projections as of Jan 18, 2026	**Dollars Projected for Month:**			1,151.15
	Actual Dollars Used:			1,346.46
	Variance (Projected minus Actual):			-195.31
	Reason for Variance:	took more hours to apply all the security updates needed to comply with NY Housing Project. Only 50% of hours displayed here, hours are being shared with a securty budget.		

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

Other Measures

Project Name	**(TSME26 RCLS (425198)) TSME26 RCLS (425198) (On Track)**
Project Mode	Primary: Not Available
Project Type	Developmental Initiatives
Budget	**Direct Budget**: 35,000.00 **Indirect Budget:** 0.00 **Total Budget:** 35,000.00
Principal Investigator/Clients	
Funding Agency	
IRB	*HUM#:* *Period of Approval:*
Project Team	*Project Lead:* Hueichun Peng
	Budget Analyst: Nicole Danielle Doher
	Production Manager:
	Senior Project Advisor: Andrew L Hupp
	Production Manager 1:
	Production Manager 2:
Proposal #	no data
Description	TSME26 Project
SRO Project Period	07/2025 - 06/2026
Data Col Period	
Security Plan	NA

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

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

Report Period	Dec, 2025 (TSME26 RCLS (425198))	Initiation
Risk Level	On Track	
Monthly Updates	Finish Nape Navigator and Nape consolidated data warehouse	
Special Issues		
Cost as of Jan 18, 2026	*Total Cost to Date (direct + indirect):*	17,407.21
	Est Cost at Completion (E$AC):	21,552.86
	Total Budget:	35,000.00
	Variance (Total Budget minus- E$AC):	13,447.14
	Reason for Variance: Only work on 1st phase	
Projections as of Jan 18, 2026	*Dollars Projected for Month:*	829.13
	Actual Dollars Used:	3,879.74
	Variance (Projected minus Actual):	-3,050.61

		Reason for Variance:	Only work on 1st phase	
Measures		**Units at Complete**	**RR**	**HPI**
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

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

Project Name	**(TSME26 REPLACE RPAY (423463)) TSME26 REPLACE RPAY (423463) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 35,000.00	**Indirect Budget:** 0.00	**Total Budget:** 35,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Hueichun Peng		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Carol Lively		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	TSME26 Project		
SRO Project Period	06/2025 - 07/2026		
Data Col Period			
Security Plan	NA		
Milestones	*Pre Production Start:*		*Pretest Start:*
	Pretest End:		*Recruitment Start:*
	Staffing Complete:		*GIT Start:*
	SS Train Start:		*SS Train End:*
	DC Start:		*DC End:*
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Dec, 2025 (TSME26 REPLACE RPAY (423463))		Initiation
Risk Level	On Track		
Monthly Updates	On Hold		
Special Issues			
Cost as of Jan 18, 2026	*Total Cost to Date (direct + indirect):*		0.00
	Est Cost at Completion (E$AC):		0.00
	Total Budget:		35,000.00
	Variance (Total Budget minus- E$AC):		35,000.00
	Reason for Variance:	NA	
Projections as of Jan 18, 2026	*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

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

Project Name	**(TSME26 SURVEYTRAK MAINTENANCE (483257)) TSME26 SURVEYTRAK MAINTENANCE (483257) (On Track)**		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	**Direct Budget**: 10,000.00	**Indirect Budget:** 0.00	**Total Budget:** 10,000.00
Principal			
Investigator/Clients			
Funding Agency			
IRB	*HUM#:*		*Period of Approval:*
Project Team	*Project Lead:* Jeffrey L Smith		
	Budget Analyst: Nicole Danielle Doher		
	Production Manager:		
	Senior Project Advisor: Carol Lively		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	SurveyTrak Maintenance		
SRO Project Period	07/2025 - 06/2026		
Data Col Period			
Security Plan	NA		

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

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

Report Period	Dec, 2025 (TSME26 SURVEYTRAK MAINTENANCE (483257))	Implementing
Risk Level	On Track	
Monthly Updates	-ST Admin 25: Bug fixes -ST Admin 25: SurveyTrak 25 and new PFC DLLs - Testing SurveyTrak 25 with Windows 11	
Special Issues		
Cost as of Jan 18, 2026	*Total Cost to Date (direct + indirect):*	6,942.81
	Est Cost at Completion (E$AC):	11,545.94
	Total Budget:	10,000.00
	Variance (Total Budget minus- E$AC):	-1,545.94
	Reason for Variance: See below	
Projections as of Jan 18, 2026	*Dollars Projected for Month:*	597.86

		Actual Dollars Used:		1,186.36

		Variance (Projected minus Actual):		-588.50

		Reason for Variance:	See notes

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

Other Measures

		Actual Dollars Used:		1,186.36

		Variance (Projected minus Actual):		-588.50

		Reason for Variance:	

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

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

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

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

Report Period	Dec, 2025 (TSME26 TEAM LOCATION (424466))	Planning
Risk Level	On Track	
Monthly Updates	Work not scheduled to start until MSMS 2.0 API's are available by February.	
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 Jan 18, 2026	*Total Cost to Date (direct + indirect):*	0.00
	Est Cost at Completion (E$AC):	8,360.48
	Total Budget:	9,000.00
	Variance (Total Budget minus- E$AC):	639.52
	Reason for Variance: negilgible	
Projections as of Jan 18, 2026	*Dollars Projected for Month:*	0.00
	Actual Dollars Used:	0.00

		Variance (Projected minus Actual):		0.00

| | Reason for Variance: | did not start work yet | |

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

Other Measures

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