INSTITUTE FOR SOCIAL RESEARCH • SURVEY RESEARCH CENTER
SURVEY RESEARCH OPERATIONS
UNIVERSITY OF MICHIGAN

SRO Fiscal Year 2024 Year-End Report

October 2024

Each year we document SRO's activities and highlight key accomplishments.

Our activity and variety of new projects continued to grow in FY2024. We far surpassed our expectations of sponsored budgets, including our highest estimation of sponsored total volume.

We hope you enjoy this review of our year – Thank you for all of your contributions!

Fiscal Year 2024 Financial Summary

FY2024 Financial Summary

- We completed $47.8M in total **sponsored** project work, generating $13.5M in indirect cost recovery fees (IDC).
  - Represents a 21.3% *increase* in IDC volume compared with FY23. SRO generated a high effective IDC rate* of 39.4% in 2024, similar to the effective rates SRO has experienced over the last five fiscal years due to an increased proportion of high IDC projects in our portfolio.
  - In FY24 we exceeded our highest estimate for sponsored budget expectations by $1.8M in total, and had $7.9M more sponsored volume than in FY23.
  - We had a $5.1M operations (overhead) budget allocation and ended the year with an underrun of $157K (3.1% underrun).

*"Effective IDC rate" represents Indirect Costs and Fees as a percentage of direct sponsored dollars

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Sponsored Volume / Contribution

This table shows the five-year trend in key metrics (see explanation below) as well as estimates for these same metrics for FY25 ranging from most conservative (i.e., Med Budget) to most aggressive (i.e., High Budget).

|	Actuals					FY2025 Budget	
	2020	**2021**	**2022**	**2023**	**2024**	**Med**	**High**
Direct Costs	25,943,936	20,296,936	22,169,619	28,747,594	34,312,471	29,779,448	31,049,885
Indirect Costs and Fees	10,981,084	8,378,918	9,290,116	11,155,720	13,528,083	9,584,494	10,293,856
Total Sponsored Costs	**36,925,019**	**28,675,855**	**31,459,735**	**39,903,314**	**47,840,553**	**39,363,942**	**41,343,741**
Effective IDC Rate	42.3%	41.3%	41.9%	38.8%	39.4%	32.2%	33.2%

Also known as IDC, these are the fees we receive over and above what we directly charge to projects (Direct Costs). They are designed to cover overhead expenses (e.g. keeping the lights on) and other expenses that cannot be directly billed to projects.

Note: Effective Rate represents sponsored income ("Indirect Costs and Fees") as a percentage of direct sponsored costs ("Direct Costs").

SRO Sponsored Volume to FTE Comparison
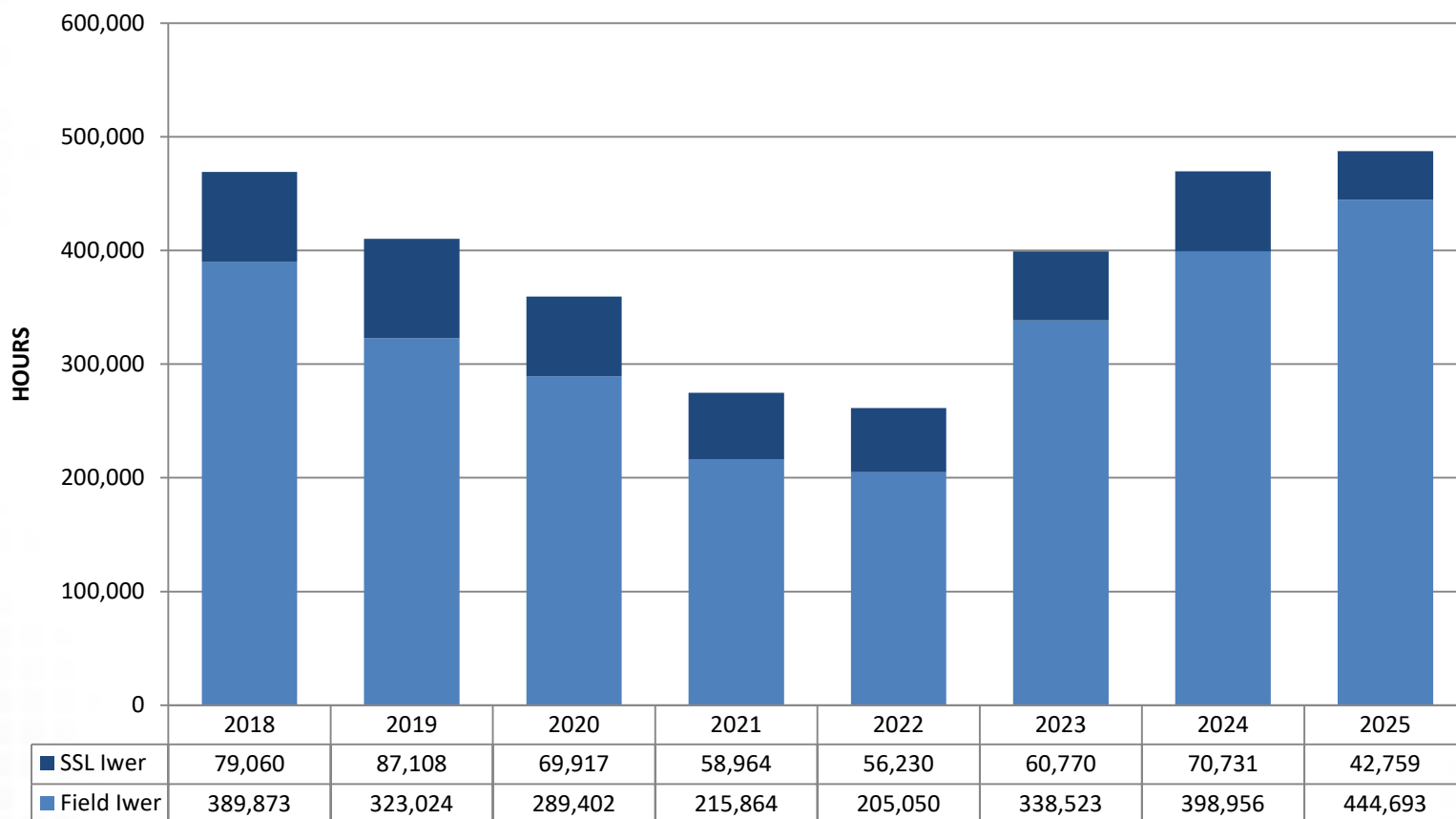### (the number of full-time regular staff in SRO)
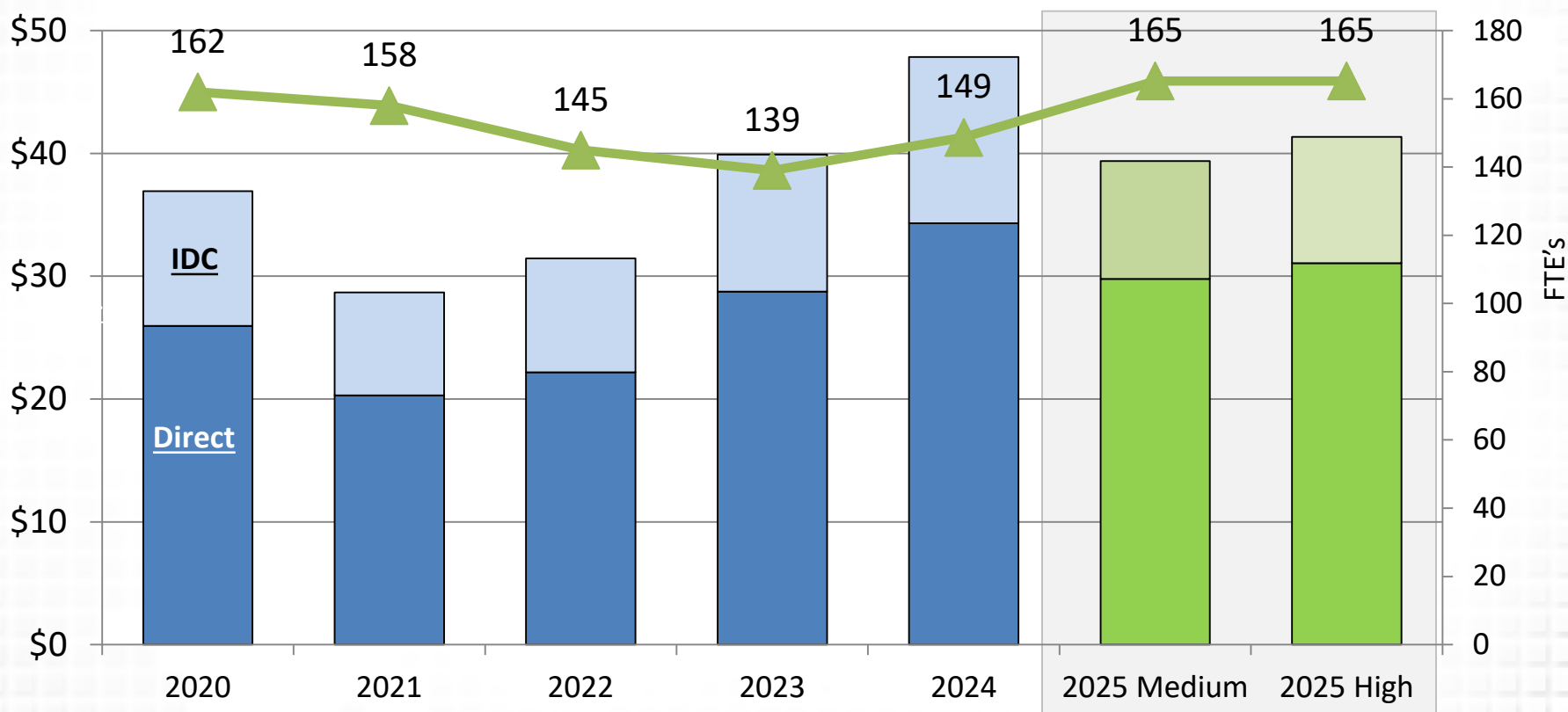
A Different Look at Volume in FY24

- SRO worked on 47 unique projects. Five of those projects had multiple funding mechanisms. Multiple funders are sometimes necessary given the total costs of some projects, but it adds a lot of complexity to cost monitoring.

- Volumes are very high! We processed 8,716 interviewer expense reports (vs. 6,809 in FY23) and 1,451 travel advances (1,081 in FY23).

- We processed $1,092,807 in respondent payments ($629,698 in FY23).

- We reimbursed $1,173,804 for mileage, which is 1,751,945 miles ($800,252 in FY23)!

- A total of 371 new interviewers were hired in FY24. The split by category was 314 in the field and 57 in the SSL. In 2023 we hired 314 in the field and 59 in the SSL.

Interviewer Hours

	2018	2019	2020	2021	2022	2023	2024	2025
■ SSL Iwer	79,060	87,108	69,917	58,964	56,230	60,770	70,731	42,759
■ Field Iwer	389,873	323,024	289,402	215,864	205,050	338,523	398,956	444,693

SRO Staff

SRO Staff by Unit – FY2025

Survey Research Staff Appointments
166 Staff / 165.2 FTEs

- SRO-Data Collection Operations (41) — 27%
- SRO Director's Office (8) — 4%
- SRO Financial Group (8) — 5%
- SRO Project Design & Mgt. (45.6) — 26%
- SRO Design, Meth, Stat Support (16) — 9%
- SRO Technical Services (46.6) — 29%
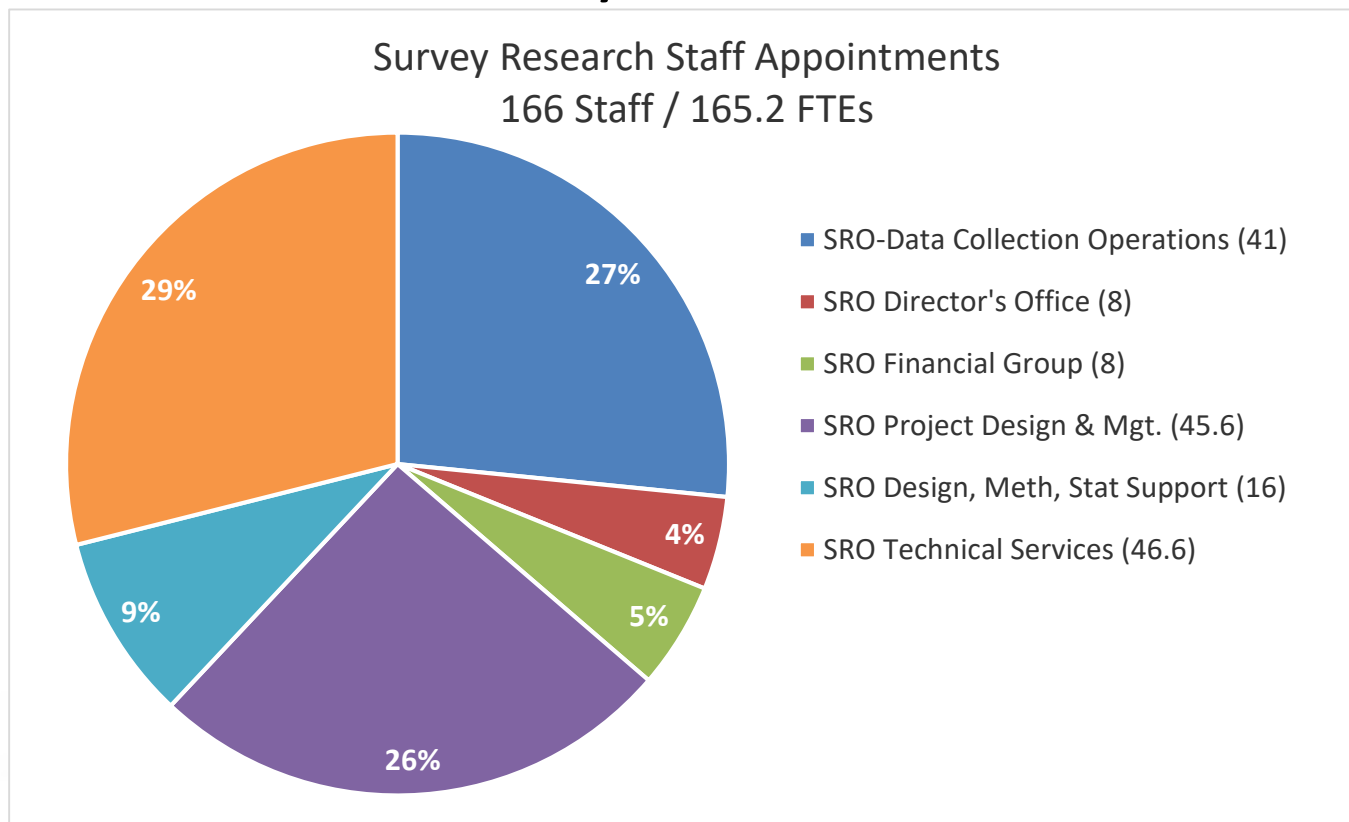
Note: Includes projected FY25 hiring efforts.

Interviewer Staff Counts

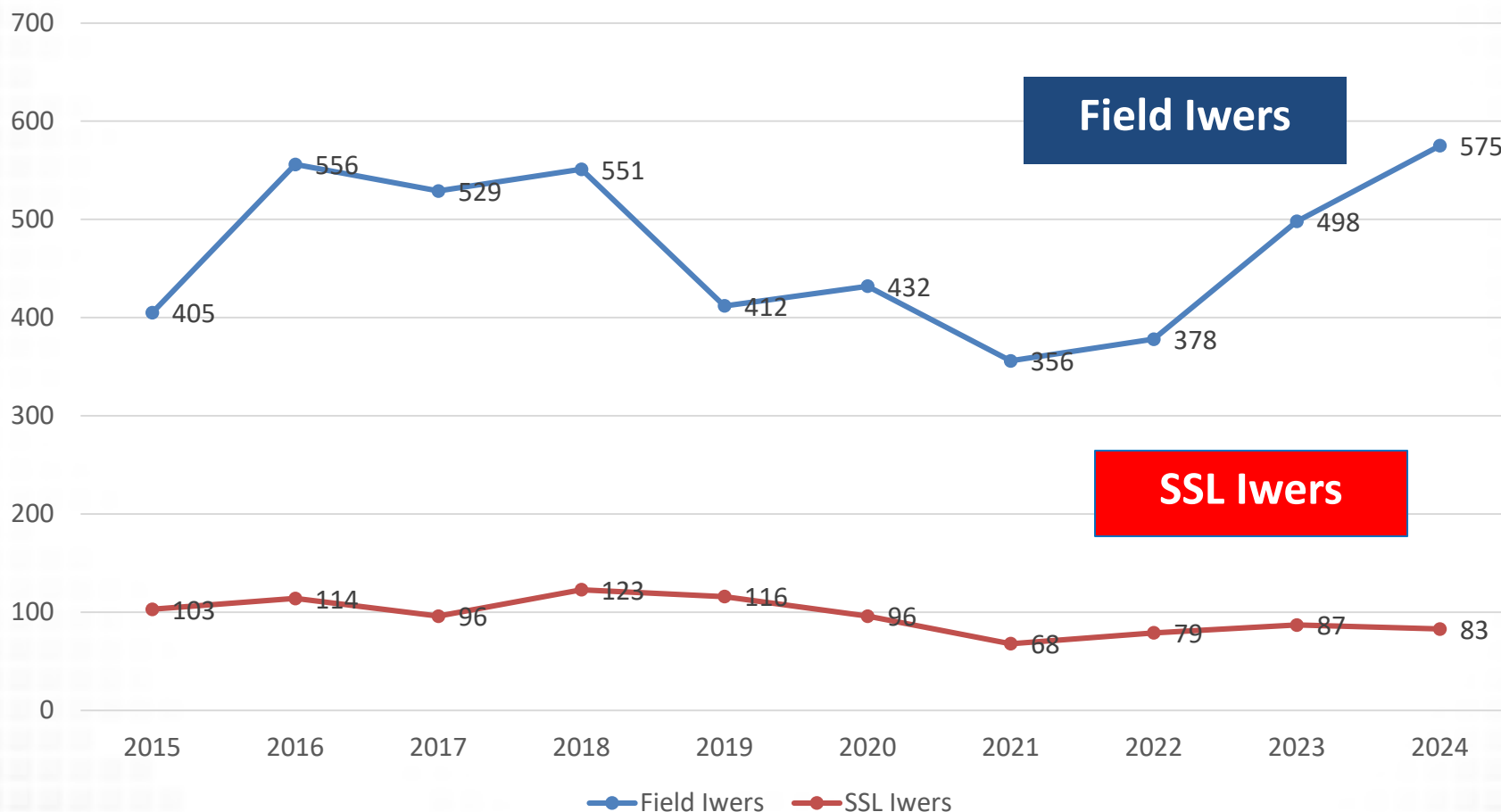## Current (August 2024) Interviewer Counts

- Field = 575 (498 last year)

- SSL = 83 (87 last year)

New Hires (July 2023 - June 2024)

- Field = 312 (last year 314 were hired)

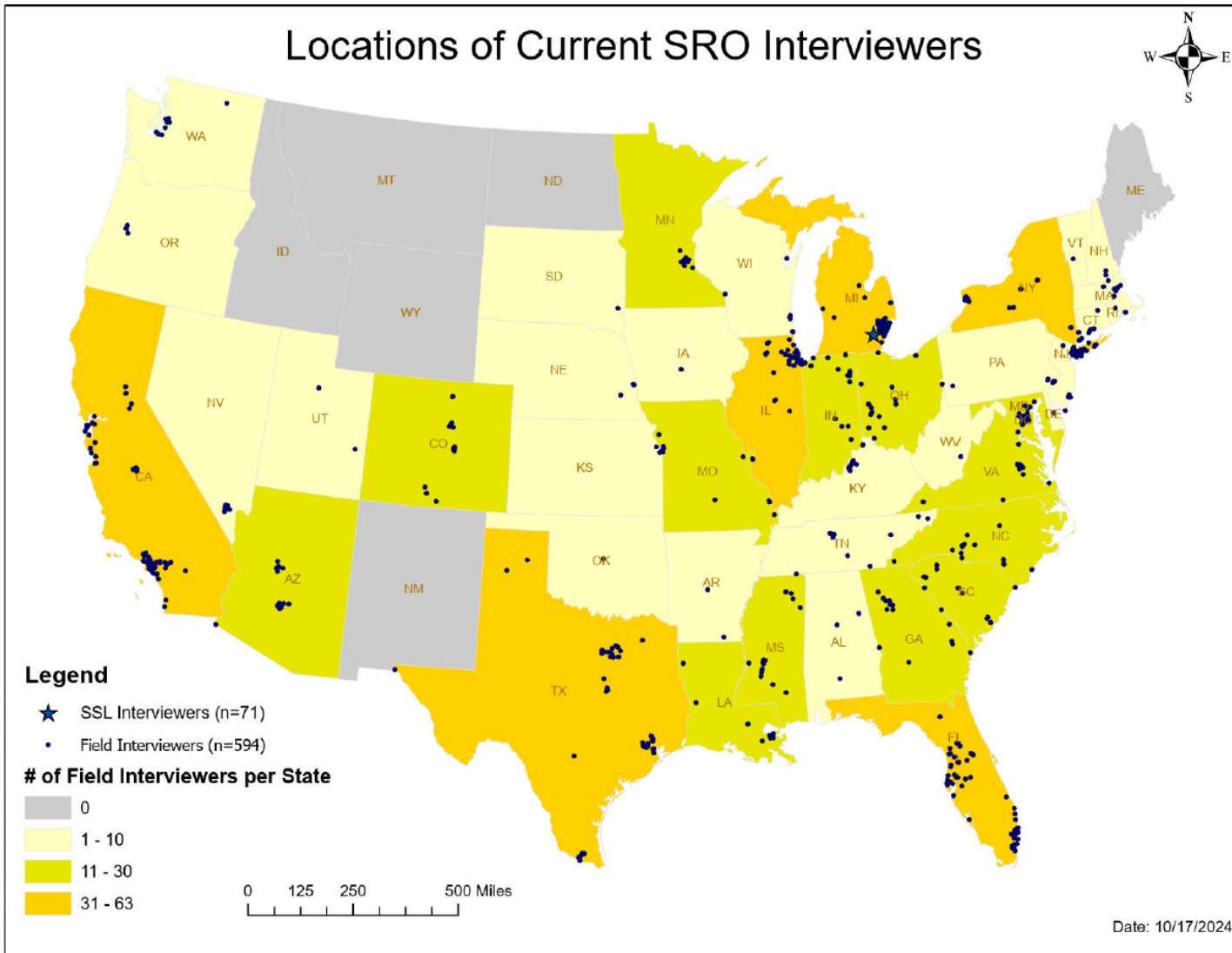- SSL = 59 (last year 59 were hired)

SRO Data Collection Staff - Counts by Year

Field Iwers: 405, 556, 529, 551, 412, 432, 356, 378, 498, 575

SSL Iwers: 103, 114, 96, 123, 116, 96, 68, 79, 87, 83

Years: 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024

Map of Interviewers

Locations of Current SRO Interviewers

Legend
- ★ SSL Interviewers (n=71)
- • Field Interviewers (n=594)

# of Field Interviewers per State
- 0
- 1 - 10
- 11 - 30
- 31 - 63

0   125   250   500 Miles

Date: 10/17/2024

SSL Multi-Channel Contact System

- Amazon Connect ("AmCon") replaced the existing phone-only system (CISCO VoIP) July 2024
- Features include
  - Softphone integration (no need for physical phones, ability to rotate between numbers depending on project we are dialing for)
  - On-site and off-site availability
  - Live monitoring tools
  - Enhanced caller identification and inbound caller routing
  - Integrated texting
  - Call and screen recording and transcription
  - Future integration of chat, email, and IVR

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Applicant Tracking System (1)

- Acquired new Applicant Tracking System (Teamtailor) in September 2023

- Features include

  - Mobile-optimized job posting and application

  - Integrated assessments, scoring, appointment setting, video interviewing, and job offer

  - Full integration with popular job boards such as Indeed, CareerBuilder, Glassdoor, Jobcase, and more, allowing streamlined importing of applications and wider distribution of job postings

Applicant Tracking System (2)

- In 2024 so far, we have:
  - Processed 15,580 applicants
  - Phone screened 4,646 potentially eligible applicants
  - Zoom interviewed 1,253 applicants
  - Made job offers to 452 qualified candidates
  - Hired 329 field interviewers

Interviewer Trainings

- Averaging just under four trainings per month and 160 trainees per month, it has been a very busy year for the training team
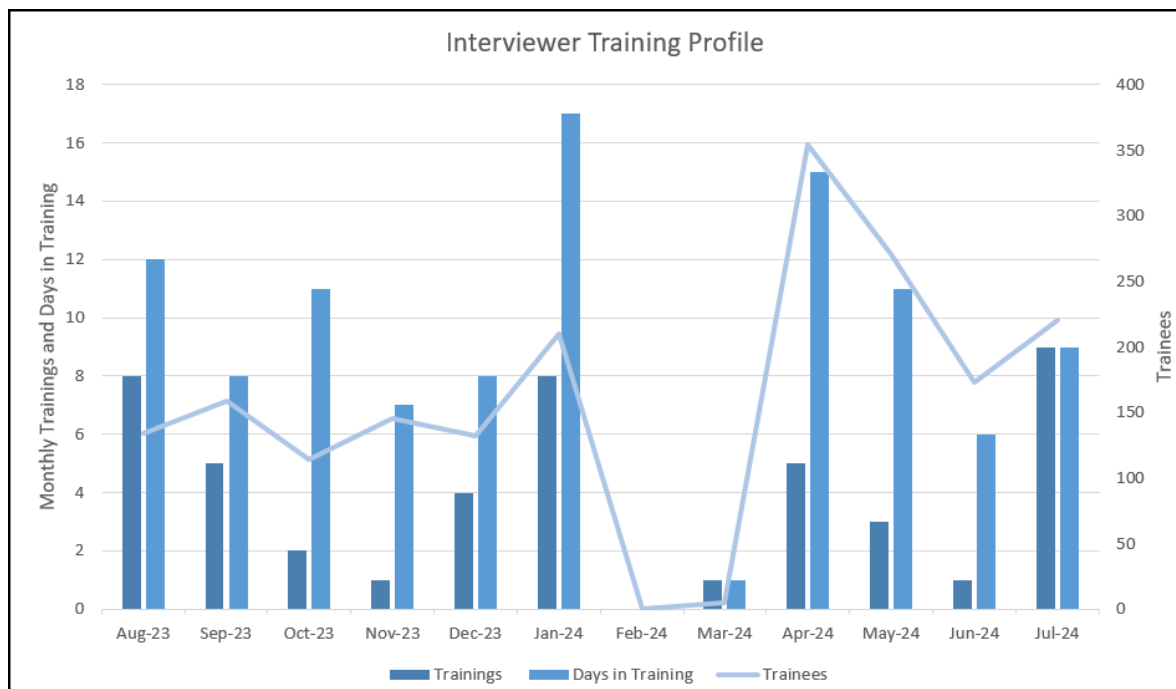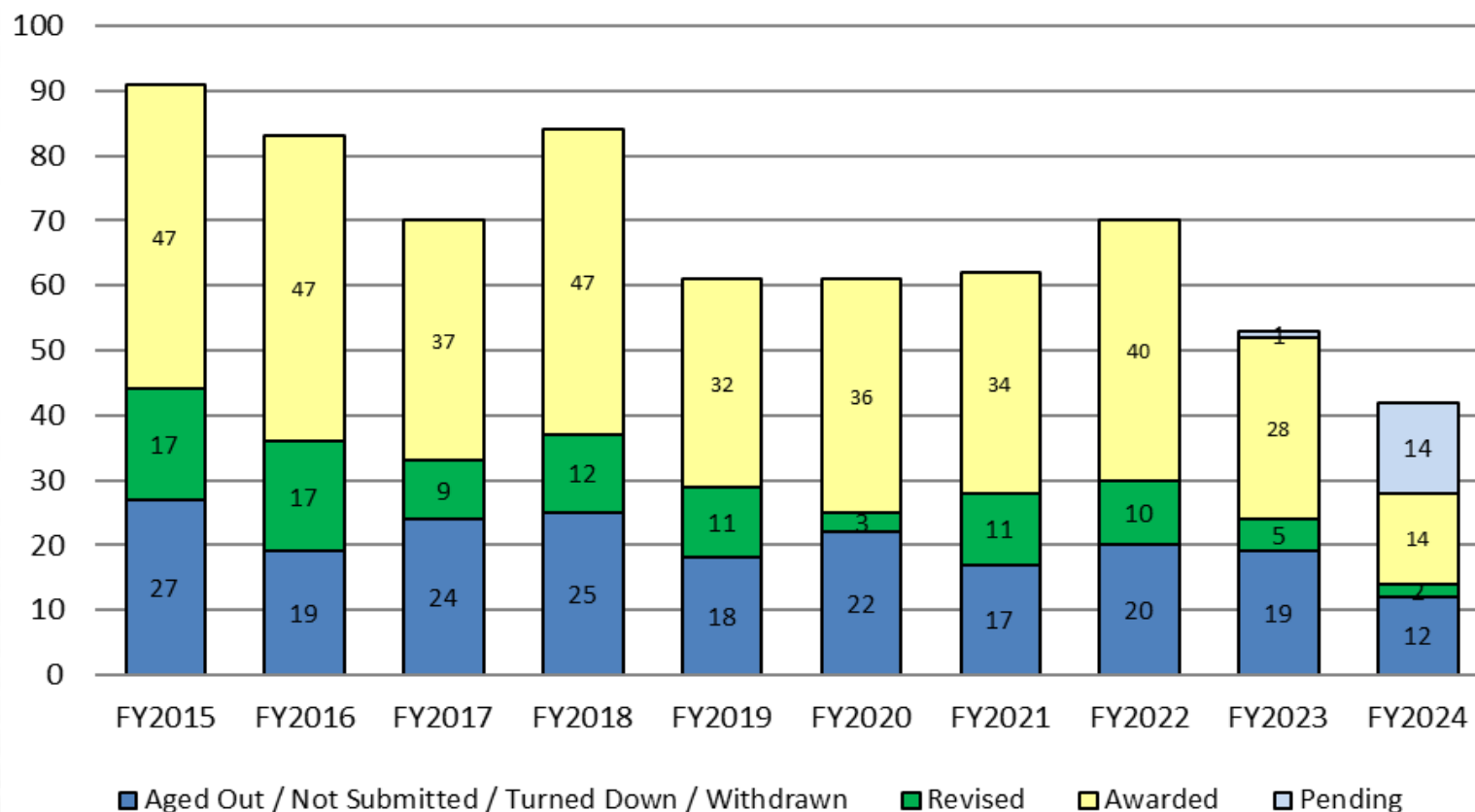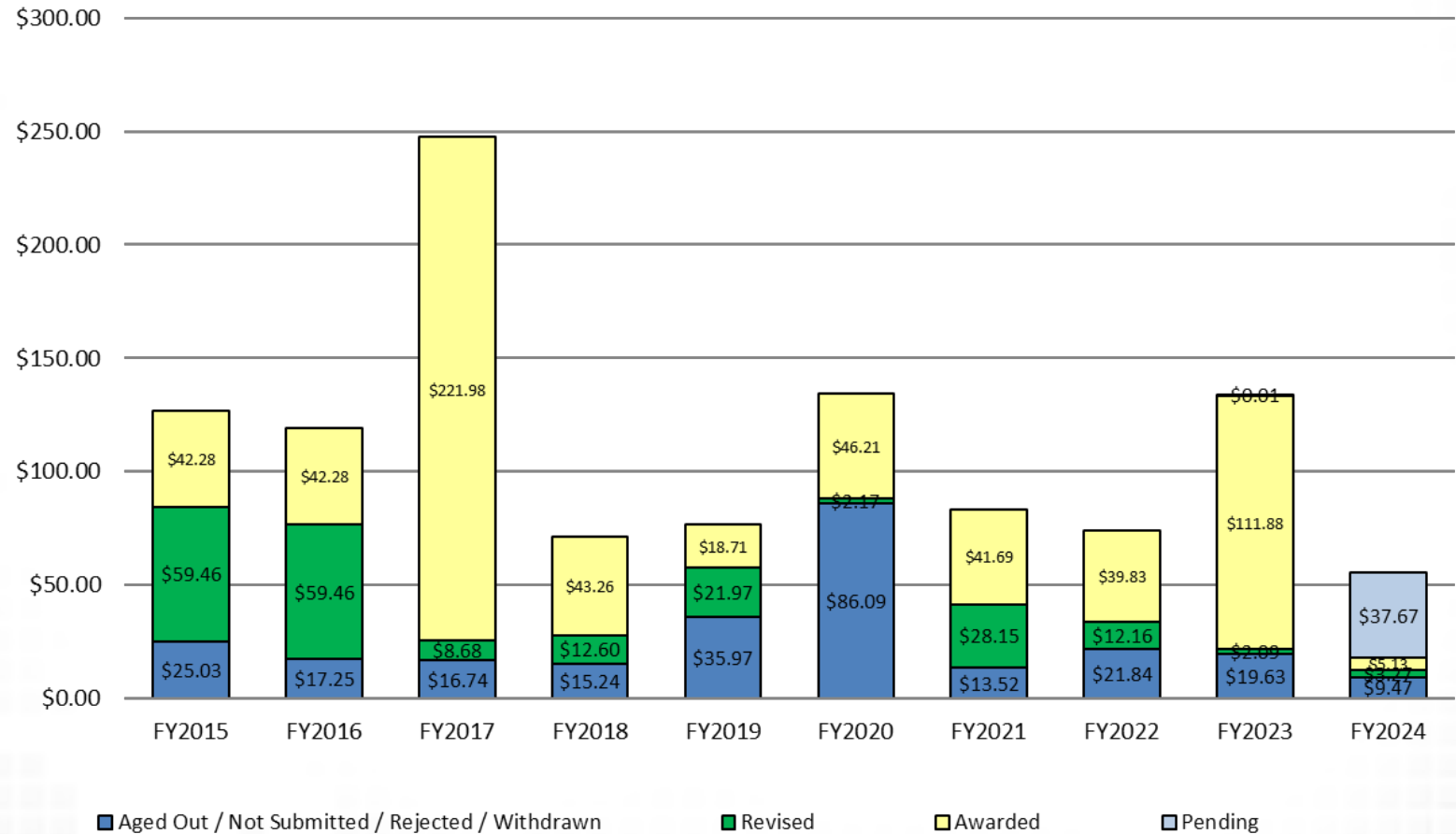
Fiscal Year 2024 Proposals and Consultations

of Formal Proposals by Disposition

Dollar Value (in Millions) of Formal Proposals by Disposition

Survey Design Consultations

- In FY24, SRO provided consultation in sampling design, questionnaire design, or data collection best practices to 111 research initiatives outside of SRO
  - 70 for U-M departments or Michigan Medicine
  - 22 for external colleges and universities
  - 19 for various foundations, institutes, private companies

Proposal Development Group Initiatives

- Full implementation of new mixed-mode data collection budget tool
  - More timely delivery of ballpark estimates
  - Increased autonomy of team members working with PIs to evaluate the costs of alternative design options
  - Elimination of data entry step increases efficiency and reduces error

- Revision of the SRO Inquiry database
  - Facilitates management, assignment, and reporting on the outcomes of all inquiries made to SRO

- Consolidation of SRO proposal databases
  - Eliminates redundancies in entry
  - Reduces potential for error related to repetitive manual entry
  - Streamlines reporting processes and automates production of weekly, monthly, and annual activity reports

SRO Support to SRC, ISR, and U-M

SRO provided assistance on the following initiatives:

- U-M Faculty Threat and Harassment Survey
- Introduction to Questionnaire Design presentations
  - School of Education (CEDER) and School of Dentistry
- SRO Representation at U-M ResearchPalooza
- LSA Undergraduate Research Opportunity (UROP) Judge

SRO provided more extensive support to the following internally funded initiatives:

- U-M Workforce Housing Survey
- SRC Mission Survey
- U-M Arts Initiative (sampling)
- U-M Vision 2034 (focus group facilitation and presentation to All-Chairs meeting)
- U-M OUD Women in Philanthropy (focus group training, analysis and reporting)
- U-M Michigan Oncology Quality Consortium (focus group facilitation)
- U-M Evidence-Based Guidelines for Terminal Decannulation Study (programming)

Conference Contributions

SRO was well-represented, with attendance at over 19 different conferences and external meetings. Our major conferences are IFDTC, AAPOR, and WAPOR; the following SRO staff contributed to those programs:

IFDTC – International Field Directors and Technologies Conference

- *Interviewer Attrition Panel Discussion Part I & II - Grant Benson, facilitator*
- *New Hire Interview Mode and Attrition – Grant Benson and Mark Baker*
- *Contact Rates: A Comparative Analysis of Phone Types – Bill Keating and Grant Benson*
- *From A to Zoom (staff management and engagement) – Sarah Crane and Grant Benson*

AAPOR – American Association for Public Opinion Research

- *Texting Breakthroughs: Innovations in SMS Recruitment and Distributions* - Andrew Hupp and Makenna Harrison supporting lead author Fred Conrad
- *Investigating Participation in Live Video Interviews* – Andrew Hupp with ANES colleagues
- *Utility of Commercial Data for Sampling Population Subgroups: A Case of Health and Retirement Study* – Raphael Nishimura and Paul Burton supporting SRC colleagues Chendi Zhao, Sunghee Lee, and Brady West

WAPOR – World Association for Public Opinion Research

- *New Longitudinal Mixed Mode Responsive Survey Designs to Study the Health and Wellbeing of Children Experiencing Armed Conflict: Ukrainian Families Across Multiple Settings* - Stephanie Chardoul, William Axinn, and Tetiana Skrypchenko (Rating Group, Ukraine)
- *A Two-Year, Frequent Interview, Longitudinal Web Survey of Young Adults in Nepal: Mixed Mode Responsive Survey Design to Reduce Selection Bias* - William Axinn and Stephanie Chardoul

Conference Contributions (continued)

CSDI, Comparative Survey Design and Implementation

- *Mixed mode responsive longitudinal survey design to reduce selection bias in Nepal* - Stephanie Chardoul

American Educational Research Association Annual Meeting

- *Survey Development in Education: Using Surveys With Students and Parents* – Jeff Albrecht, discussant

IBUC, International Blaise Users Conference

- *What was experienced by skilled Blaise programmers to transition from Blaise 4.8 to 5.0* – Dave Dybicki and Peter Sparks

- *Creating a Respondent Self-Scheduling: Interface Using Blaise 5* - Andrew Hupp, Peter Sparks and Andrew Piskorowski

- *Video Interviewing: An Overview* – Andrew Hupp

- *Video Interviewing at the University of Michigan* - Andrew Hupp, Youhong Liu, and Karl Dinkelmann

BCLUB, Blaise Corporate License User Board meeting

- SRO presented the *U-M Update*, covering Sample Management Systems and Blaise 5, Device Instrument Manager, Write Interceptor, and Blaise production SQL server Replication – Karl Dinkelmann

SRO Contributions to Committees

- SRC Comm3 – Communication and Community Committee
  - https://src-intranet.isr.umich.edu/comm3/
  - This Center-level communication team promotes well-being and a sense of community at SRC and ISR and increased awareness of Center activities (Lisa Holland, Maureen O'Brien, Marsha Skoman)

- ISR DEI Community Working Group (formerly DACCD)
  - https://intranet.isr.umich.edu/dei/daccd/
  - Physical Accessibility (Helen Johnson)
  - Community Guides (Debbie Seale)
  - Social Justice (Hueichun Peng)

- ISR DEI Staff Working Group (Nancy Walker)

Clinical Contact Program (CCP)

- The SRO-CCP Supports all SRO Projects.

- STARRS-LS generated 81% of all referrals.

- A 27% increase in total referral count was observed compared to last year (937 vs. 682), largely driven by consistent STARRS-LS production work throughout FY24.
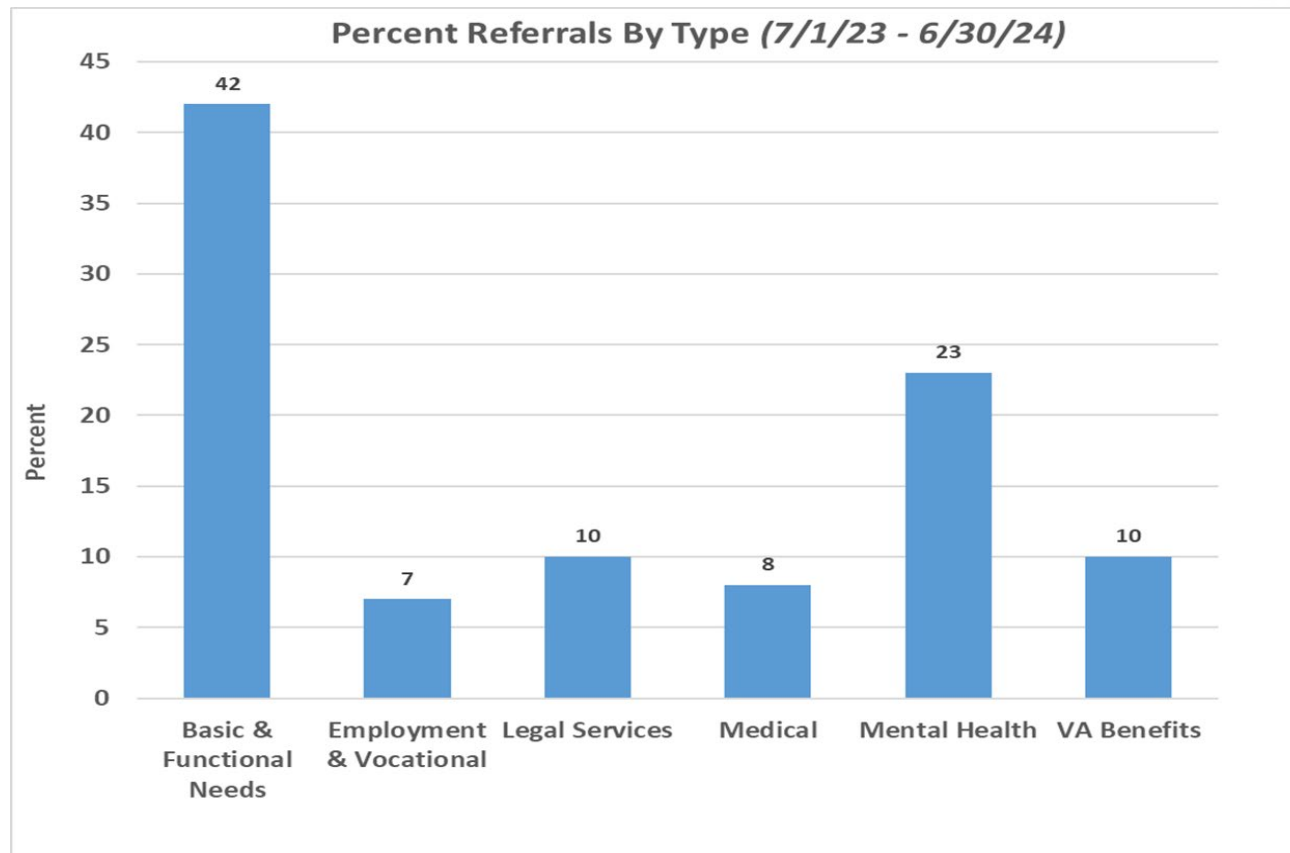
Table 1. SRO-CCP Referral Counts, by Project (July 1, 2023 through June 30, 2024)	
Project Name	Referral Counts
Study to Assess Risk and Resilience in Servicemembers-Longitudinal W4	759
Transition to Adulthood within its Life Course & Intergenerational Family Context	74
Health and Retirement Study	52
Baby's First Years	10
Michigan COVID-19 Recovery Surveillance Cohort Study	10
Panel Study of Income Dynamics Core 2023	8
PSID Child Development Supplement	6
Social Relations	5
Harmonized Cognitive Assessment Protocol, 2022	3
Health and Wellbeing in Southeast Michigan	3
STARRS-LS VA - Housing, Employment, Assessment Risk, Transitions, Help (HEARTH)	3
Surveys of Consumer Attitudes	2
Detroit Area Wellness Program - COVID Supplement	1
Every Dollar Counts - Endline	1
Total	937

Clinical Contact Program (CCP)

- The highest proportion of referrals were provided for basic and functional needs.

- Referrals for basic and functional needs increased from last year (42% vs. 34%) while referrals for mental health services decreased (23% vs. 38%).

- Change in referrals provided over time reflect multiple factors such as respondent needs, community resources, differential respondent contact rates, and projects in production.

Percent Referrals By Type *(7/1/23 - 6/30/24)*

Bar chart showing Percent on the y-axis (0 to 45) by referral type:
- Basic & Functional Needs: 42
- Employment & Vocational: 7
- Legal Services: 10
- Medical: 8
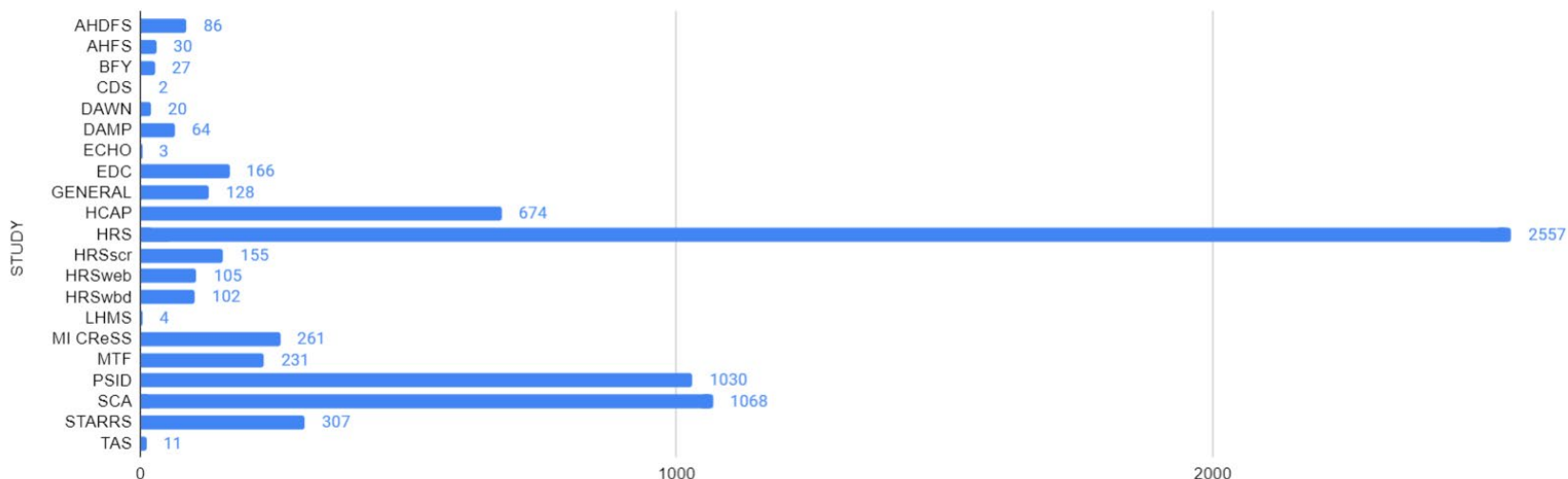- Mental Health: 23
- VA Benefits: 10

Respondent Connection Team (RCT)

- RCT supports all field projects at SRO by staffing the toll free lines
- Volume is typically directly related to advance mailings and often at a greater volume for new respondents
- HRS accounted for the vast majority of in-bound toll free calls (36%)
- 7,031 total inbound calls

RCT Inbound Calls FY 7/22 - 6/23

STUDY	Calls
AHDFS	86
AHFS	30
BFY	27
CDS	2
DAWN	20
DAMP	64
ECHO	3
EDC	166
GENERAL	128
HCAP	674
HRS	2557
HRSscr	155
HRSweb	105
HRSwbd	102
LHMS	4
MI CReSS	261
MTF	231
PSID	1030
SCA	1068
STARRS	307
TAS	11

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Interviewer Technical Support

The SRO Interviewer Technical Support team provides technical support to projects seven days a week, including support for interviewer trainings, responding to individual support requests, and configuring and managing equipment used by interviewers.

Projects

Tech Support provided technical support for **23 projects** throughout the year.

Training

Tech Support supported **39 different interviewer trainings** for a total of **148 days** throughout the year. These trainings included both in person and remote training support for field and lab interviewers plus internal staff.

Support tickets

Tech Support **6202 tickets** throughout the year and closed **5330** of those tickets that were not transferred to other teams).

Equipment

Tech Support supported approximately **550 cell phones**, **430 tablets** and **600 laptops** at various times throughout the year.

Interviewer Laptop Hardware Upgrade

Our transition to the new Lenovo laptops and updated DRI equipment marks a significant enhancement in performance, user experience, and productivity. Our upgraded hardware includes an upgraded processor with more cores, increased RAM, and a higher-resolution display. These improvements double the storage capacity and deliver better speed and efficiency compared to the old Fujitsu laptops. Despite a larger 14" screen, the laptops maintain the same compact form factor, providing a better viewing experience without sacrificing portability.

Performance Enhancements:
- RAM: 32 GB (New Lenovo) vs. 16 GB (Old Fujitsu)
- Processor: i7 (10 Cores) vs. i7 (4 Cores)
- Storage: 512 GB SSD vs. 256 GB SSD

Usability Enhancements:
- Display Resolution: 1920 x 1200 vs. 1360 x 768
- Screen Size: 14" vs. 13.3" (Same form factor)

New DRI Equipment
- Benefits: Simpler setup with fewer failure points and less hardware issues

MTF Illume to Qualtrics Transition

- Successfully migrated MTF Base-Year and Panel surveys from Illume to Qualtrics within a short period of 6 months of preparation

- Successes included:

  - Integration between Qualtrics and SRO Sample Management System

  - Project Survey Portals

  - Gaining expert knowledge in Qualtrics to handle complex logic and survey design

SRO Wellness Committee

- Focuses on the U-M's model of well-being and its eight dimensions of wellness—physical, emotional, environmental, financial, occupational, social, intellectual, and spiritual

- Members in FY24: Ashanti Harris (Lead), Rebecca Gatward, Nicole Kirgis, Debbie Seale, Jeff Smith, and Deb Wilson

Wellness Initiatives, July 2023 – June 2024

- Some highlights include:
  - Promoted available U-M resources and programs
  - Farmer's market walks
  - Beverage and ice cream walks
  - Food trucks
  - Meal prepping lunch and learn
  - University of Michigan Credit Union informational session
  - Book swap
  - Freecycle event
  - Cooking class
  - Seed pop-up event

Conclusion

Of course, not explicitly mentioned, are the *many* projects SRO successfully launched and/or completed during the year.

This report is intended to provide some context behind the effort we put into our (never-ending!) production across sponsored projects.

SRO's work is unique and impactful. Thank you, again, for your contributions!