Welcome!

Presentations begin at **12:35**

This is a compostable event—Please compost cups, plates, and utensils. Questions? Ask our Green Team members: Ann, Bree, or Lachlan

SRO Connections—
Optional table game. See instructions at your table.

SRO Connections

- Look at a grid of 20 acronyms
- Pick four that have a Connection to each other
- Do this five times, until all 20 acronyms in the puzzle are grouped
- The twist is that some of the acronyms have more than one Connection!

SRO Connections

PC	AHRB	SCIP	D-AMP
CDS	IMO	BRB	MTF
SRS	CARE	PI	IDK
SPA	HCAP	HCHD	DAWN
ECHO	LMK	SSA	NDWS

SRO Connections Clues

- What are you studying?

- Who are you studying?

- Who is doing the studying?

- Why aren't you studying?

SRO Connections Answers!

Studies that include minor respondents	MTF	AHRB	CDS	HCHD
Studies of dementia related conditions	D-AMP	NDWS	HCAP	SRS
Acronyms commonly used in texting	LMK	BRB	IMO	IDK
Common roles on data collection projects	SPA	PI	PC	SSA
Homophones for everyday words	ECHO	SCIP	DAWN	CARE

Connections

Welcome

Stephanie Chardoul
she / her / hers
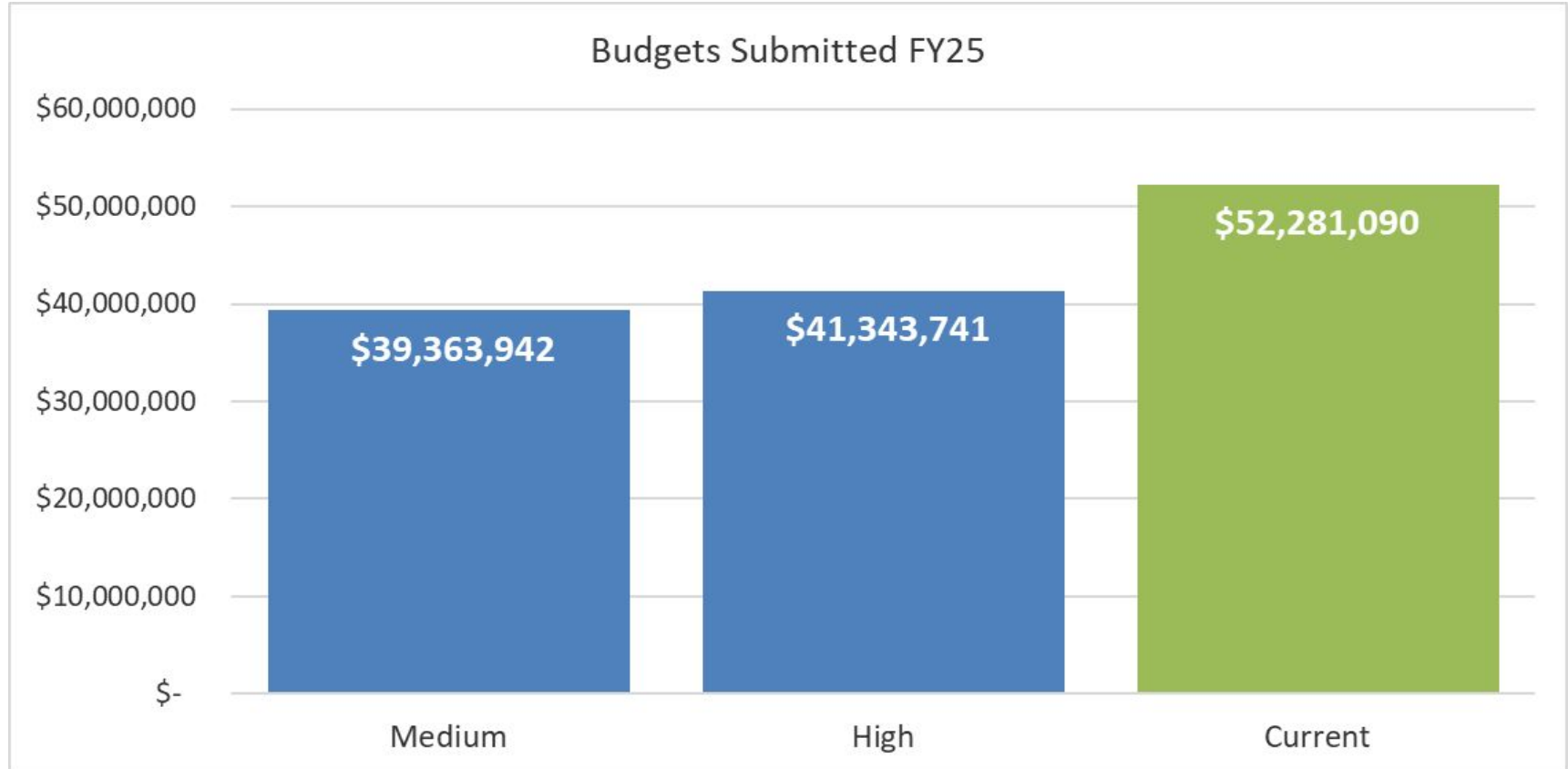
Today's Agenda

- SRO Director Remarks
  - SRO updates
  - Financial updates
  - Q & A
- Technical Services Group Updates
  - Q & A
- Project Updates
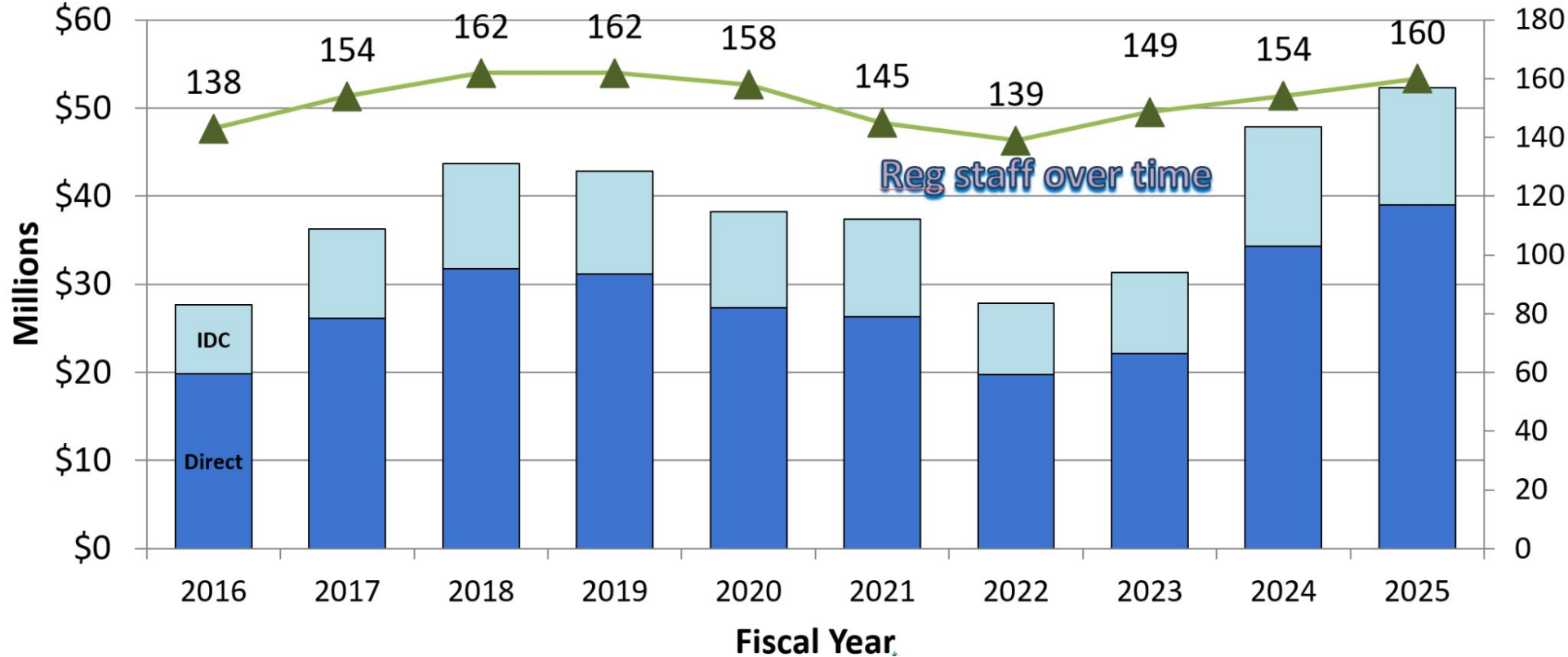- Welcome New Staff
- Wellness Committee Update

SRO Director Remarks

Fiscal Year 2025 – original budget and current projection

Budgets Submitted FY25

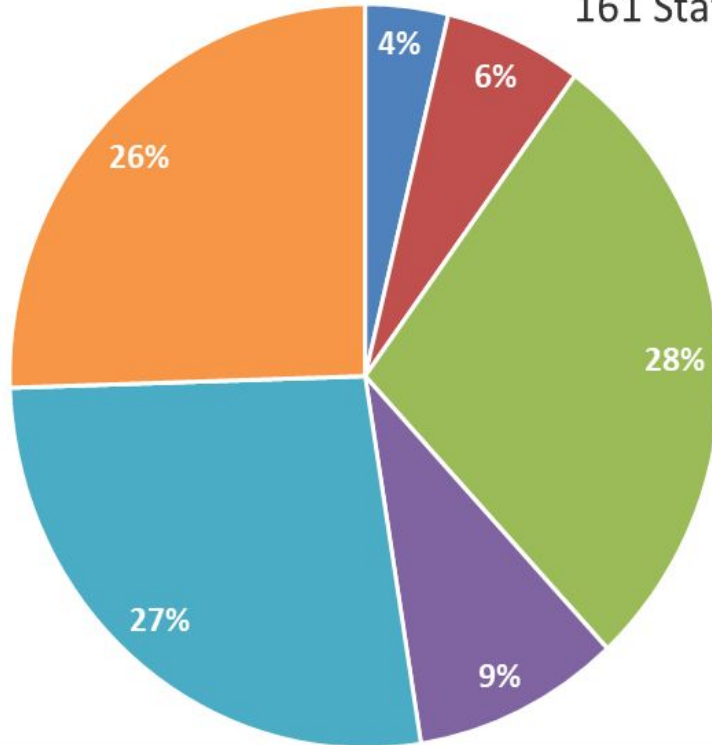|	Medium	High	Current
	$39,363,942	$41,343,741	$52,281,090

SRO revenues and regular staff

SRO staff by department

Survey Research Staff Appointments
161 Staff / 159.2 FTEs

- SRO Director's Office (6.0)
- SRO Financial Group (10.0)
- SRO Project Design & Mgt. (44.6)
- SRO Design, Meth, Stat Support (15.0)
- SRO Technical Services (43.0)
- SRO Data Collection Operations (40.6)

4%
6%
26%
28%
27%
9%

Summary of what we know

❖ Projects we lost
❖ Projects we kept

❖ The federal government
❖ The University of Michigan

❖ Planning for FY 2026

SRC Future of Surveys, and SRO tech systems

❖ Jan 31 meeting with SRC faculty and staff
  - ➢ Multiple working groups
  - ➢ Follow up meeting June 27
  - ➢ SRC support for initiatives, including SRC/SRO Interviewer Task Force

❖ Focus of resources on SRO sample management system
  - ➢ Emphasis on performance and efficiency (and also meeting project requirements)
  - ➢ Identification of functionality; what to "borrow" from other tools?
  - ➢ Consolidation in phases
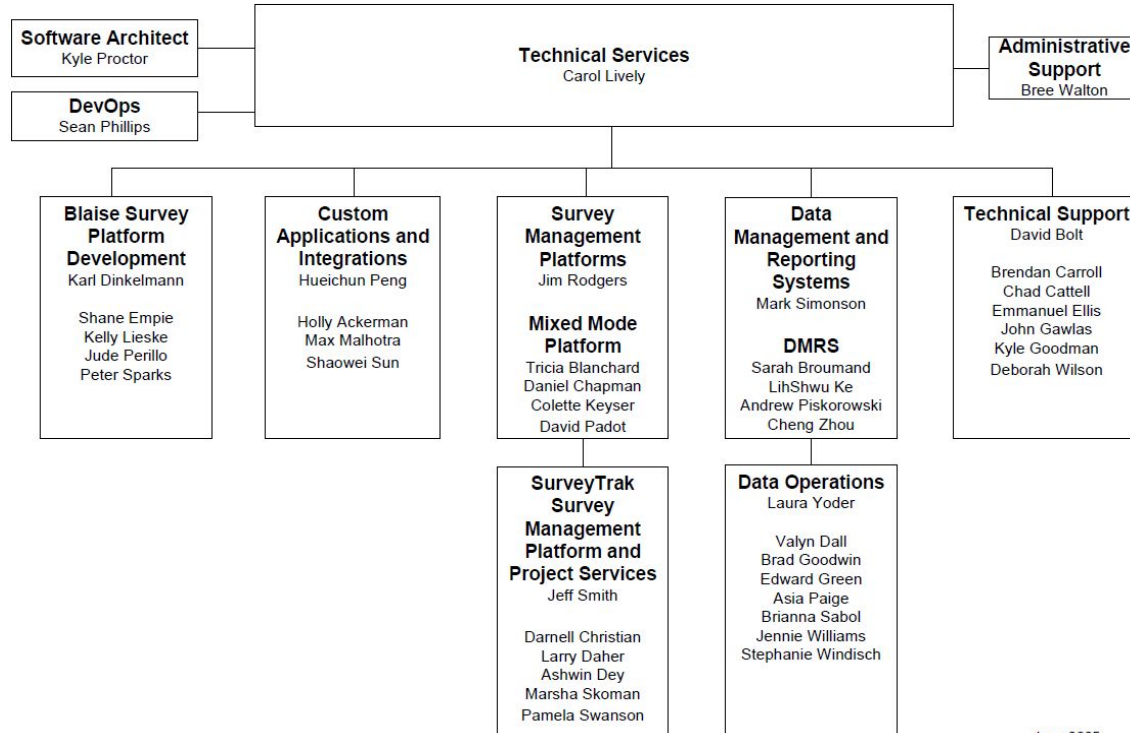 - ➢ Careful review of plan, and support of SRO leadership

Q & A

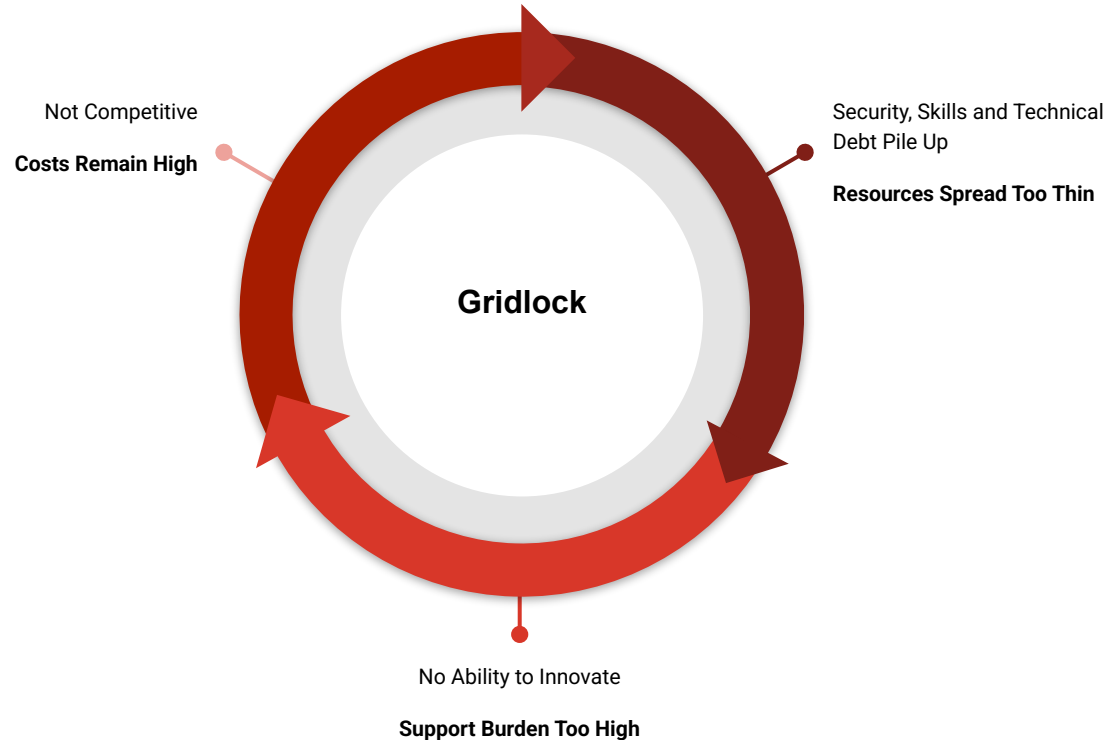# Technical Services Group Updates

Carol Lively

Organization Changes

Survey Research Operations
Technical Services Group

Technical Services
Carol Lively

Software Architect
Kyle Proctor

DevOps
Sean Phillips

Administrative Support
Bree Walton

Blaise Survey Platform Development
Karl Dinkelmann

Shane Empie
Kelly Lieske
Jude Perillo
Peter Sparks

Custom Applications and Integrations
Hueichun Peng

Holly Ackerman
Max Malhotra
Shaowei Sun

Survey Management Platforms
Jim Rodgers

Mixed Mode Platform
Tricia Blanchard
Daniel Chapman
Colette Keyser
David Padot

Data Management and Reporting Systems
Mark Simonson

DMRS
Sarah Broumand
LihShwu Ke
Andrew Piskorowski
Cheng Zhou

Technical Support
David Bolt

Brendan Carroll
Chad Cattell
Emmanuel Ellis
John Gawlas
Kyle Goodman
Deborah Wilson

SurveyTrak Survey Management Platform and Project Services
Jeff Smith

Darnell Christian
Larry Daher
Ashwin Dey
Marsha Skoman
Pamela Swanson

Data Operations
Laura Yoder

Valyn Dall
Brad Goodwin
Edward Green
Asia Paige
Brianna Sabol
Jennie Williams
Stephanie Windisch

June 2025

18

Impact of Not Reducing SMS Footprint

Not Competitive

Costs Remain High

Security, Skills and Technical Debt Pile Up

Resources Spread Too Thin

Gridlock

No Ability to Innovate

Support Burden Too High

Current SMS Status

SMS System	Status	MSMS Capability
Blaise SMS (Blaise 4)	**Limited**	Overlap
WebSMS (Qualtrics)	**Available**	Gap
WSMS (Blaise)	**Limited**	Overlap
SurveyTrak Domestic (Blaise)	**Limited**	Overlap
SurveyTrak International (Blaise)	**Available**	Gap
MSMS (Blaise)	**Available**	-----------

MSMS Strengths

Offline/Online

Feature Rich

API First

Modern
Architecture
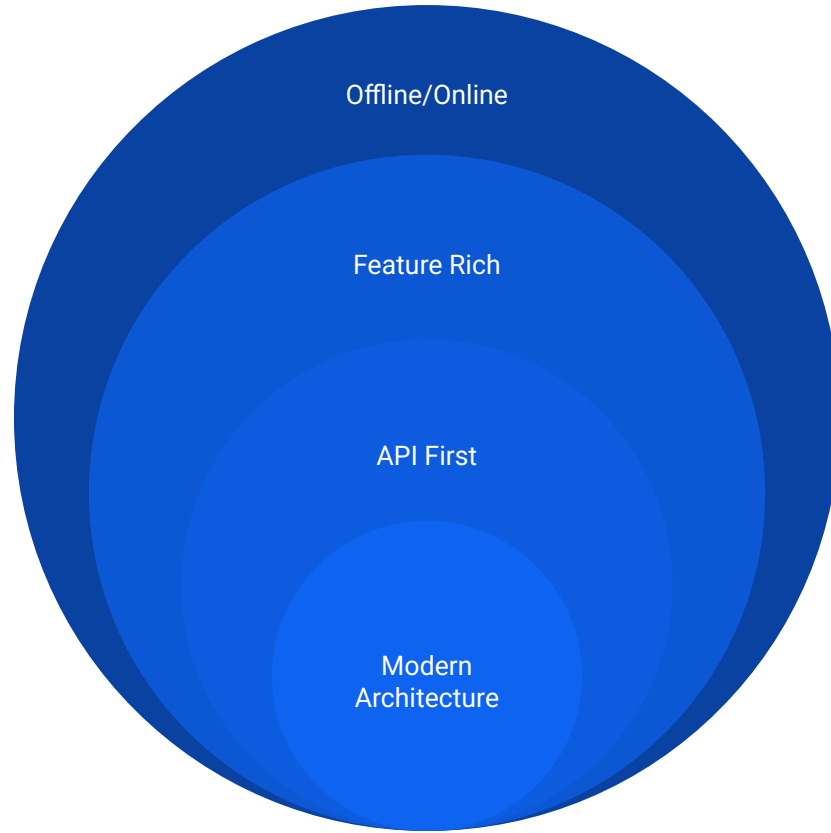
Notable Projects in MSMS

	Performance Drivers		Pre-Prod Configuration Drivers		
	Sample Lines	Project Attributes	System Comm Tasks	DCA Project Tabs	Notes
PSID 2025 Core	10,321	1,435	226+	20	
STARRS LS Wave 5 (2024)	6,236	840	35+	5	
HRS 2024	6,437	1,036	15+	7	Split with SurveyTrak
ANES (2024)	14,817	1,163	34 + 53	3	Split with SurveyTrak
HRS 2022 Web Screener	78,716	76	0	0	
PSID 2021 Core	11,159	991	200	12	Lots of sync problems
HRS 2018	2,951	145	20	0	Split with SurveyTrak
AFHS (2020)	41,848	271	162	1	
STARRS LS Wave 1 (2016)	52,001	290	26	0	

MSMS has problems …
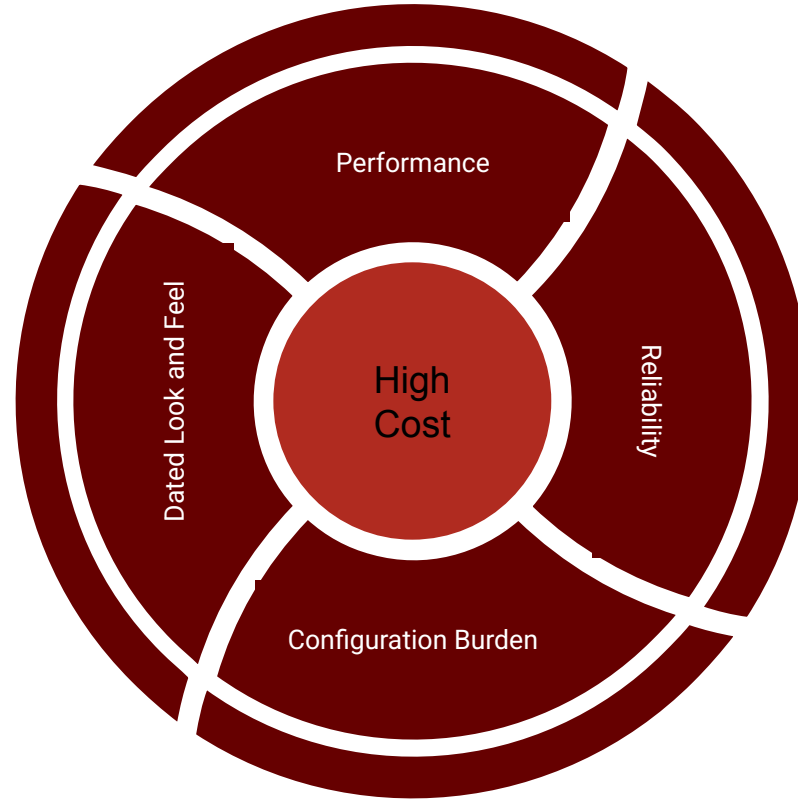
What is driving MSMS confidence?

Investment in MSMS Team

Strategic planning and prioritization

Team is in the strongest position to address issues

Investment in better logging and tools

Iterative Approach
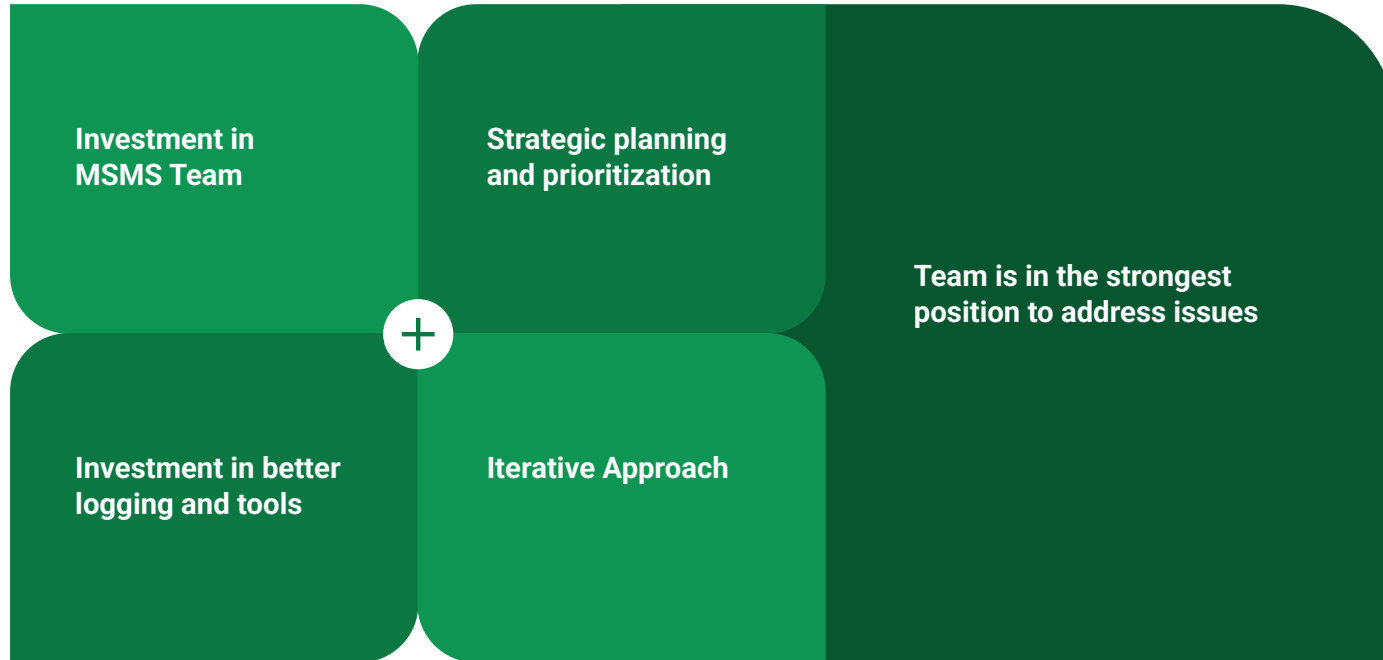
Preparing to reduce our SMS footprint

Phase 1	Phase 2	Phase 3

Phase 1
- Improve DCA performance
- Improve Server side update and rules performance
- Improve overall reliability
- Add locating, logging and payment applications including APIs
- Restrict use of "Limited" SMSs
- Transition available TSG resources to MSMS setup programmers and MSMS data managers

Phase 2
- Improve MSMS configuration
- Integrate with Qualtrics
- Support International
- Retire "Limited" SMSs
- Transition available resources to MSMS automated tests, MSMS setup and Blaise Programmers

Phase 3
- Rewrite DCA, MAP and PAU in React/Material Design
- Retire remaining non-MSMS SMSs
- Rebalance TSG resources to MSMS setup, MSMS automated tests, and MSMS application rewrite

Q & A

Projects

Shonda Kruger Ndiaye
she / her / hers

Health and Retirement Study Mid Generation X

HRS (MGenX)

HRS MGenX: Purpose

- Longitudinal studies, like the HRS recruit new respondents to refresh the aging sample and continue to deliver cohort-specific findings
- Every six years HRS recruits a new birth cohort
  - 1998 - Children of the Depression (CODA) 1924-1930 and War Babies (WB) 1942-1947
  - 2004 - Early Baby Boomers (EBB) 1948-1953
  - 2010 - Mid Baby Boomers (MBB) 1954-1959 + expanded EBB/MBB minority
  - 2016 - Late Baby Boomers (LBB) 1960-1965
  - 2022 - Early Generation X (EGenX) 1966-1971 + older cohort minorities
- As part of the 2022 screening process we pre-identified eligible households for the next birth cohort to be enrolled in HRS in 2028, Mid-Generation X (MGenX), those born between 1972-1977

HRS MGenX: Scope

- MGenX recruitment has two components
  - Pre-Id cases in 2025 and early 2026 *(based on some success from work done in 2019)*
  - Continuous recruitment beginning mid-to-late 2026
- Shortened baseline interview (~30 minutes), baseline will occur in 2028
- $100 incentive
- Mode: In-person and telephone
  - Web option for non-response follow-up
- Pre-Id =~4,000 HHs / = ~6,250 persons
- 46 on-staff interviewers (from 2022 and 2024) HRS
- 1 PC + 4 TLs
  - Regular staff model
  - 1-year appointment that can be renewed

HRS MGenX: Timeline

- Pre-Id
  - System development now
  - Training 1 for those coming off of HRS 2022 - Week of August 4
  - Training 2 for those coming off of HRS 2024 - Week of Sept. 1
- Continuous
  - Sampling work until July 2026
  - Data collection start expected September 2026

HRS MGenX

HRS Longitudinal Cohort Sample Design

MGenX here
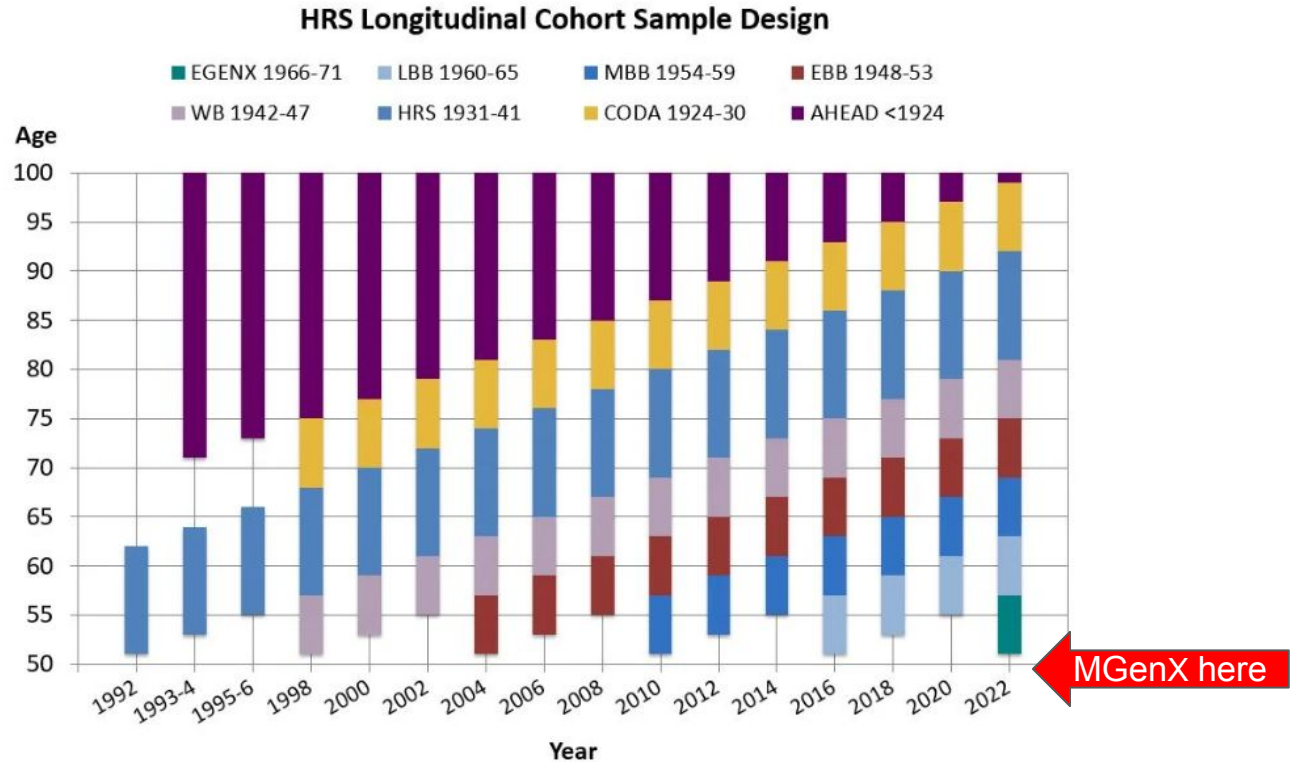
WAISS

U-M Wallenberg Institute Student Survey

WAISS: Purpose

- Research questions:
  - How do students' prejudicial beliefs about different religious and racial groups develop while attending U-M as undergraduates?
- Main constructs of interest:
  - Religious background and upbringing
  - Religious beliefs of self and friends
  - Ancestry and race
  - Prejudices towards Christians, Muslims, and Jews

WAISS: Scope

- Pre-study
  - Survey design
  - Focus groups
  - Web survey pretest
- Wave 1
  - N≈14,500 U-M undergraduates
  - Data collection in Qualtrics
  - Sample management in Web SMS
  - Data management
  - Survey data analysis
- Waves 2-5
  - Data collection each fall through 2029
  - New first year students recruited each year

WAISS: Timeline

- Prestudy (Spring-Summer 2025)
  - Focus groups and web survey pretest
- Waves 1-5 (Summer-Winter 2025-2029)
  - Pre-production each summer-fall
  - Web survey production each fall
  - Post-production each fall-winter

Fall 2025

Year in College

Cohort 1
First Year
4,667

Cohort 2
Sophomore
4,700

Cohort 3
Junior
3,100

Cohort 4
Senior
2,000

Future of Families and Child Wellbeing Study

FFCWS

Survey of Parents and Families

FFCWS: Study purpose

- longest-running birth cohort study in the US based on a national probability sample, and the only birth cohort study in the US of a contemporary sample of young adults.

- **Design:** Based on sample 4,898 children born in the largest U.S. cities between 1998-2000. Oversampled unmarried mothers by 3:1. Mothers were interviewed shortly after birth and fathers interviewed in hospital or by phone.

Research Qs:

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?
4. How do policies and environmental conditions affect families and children?

FFCWS: Scope of SRO work

- Follow-up interviews conducted when children were ages 1, 3, 5, 9, 15 and 22. SRO will conduct the 8th wave (year 27).
- Locate and interview study participants
- Web first, then TEL and FTF modes
- Goal to interview the Young Adult (~27 years) and a designated (former) Primary Caregiver

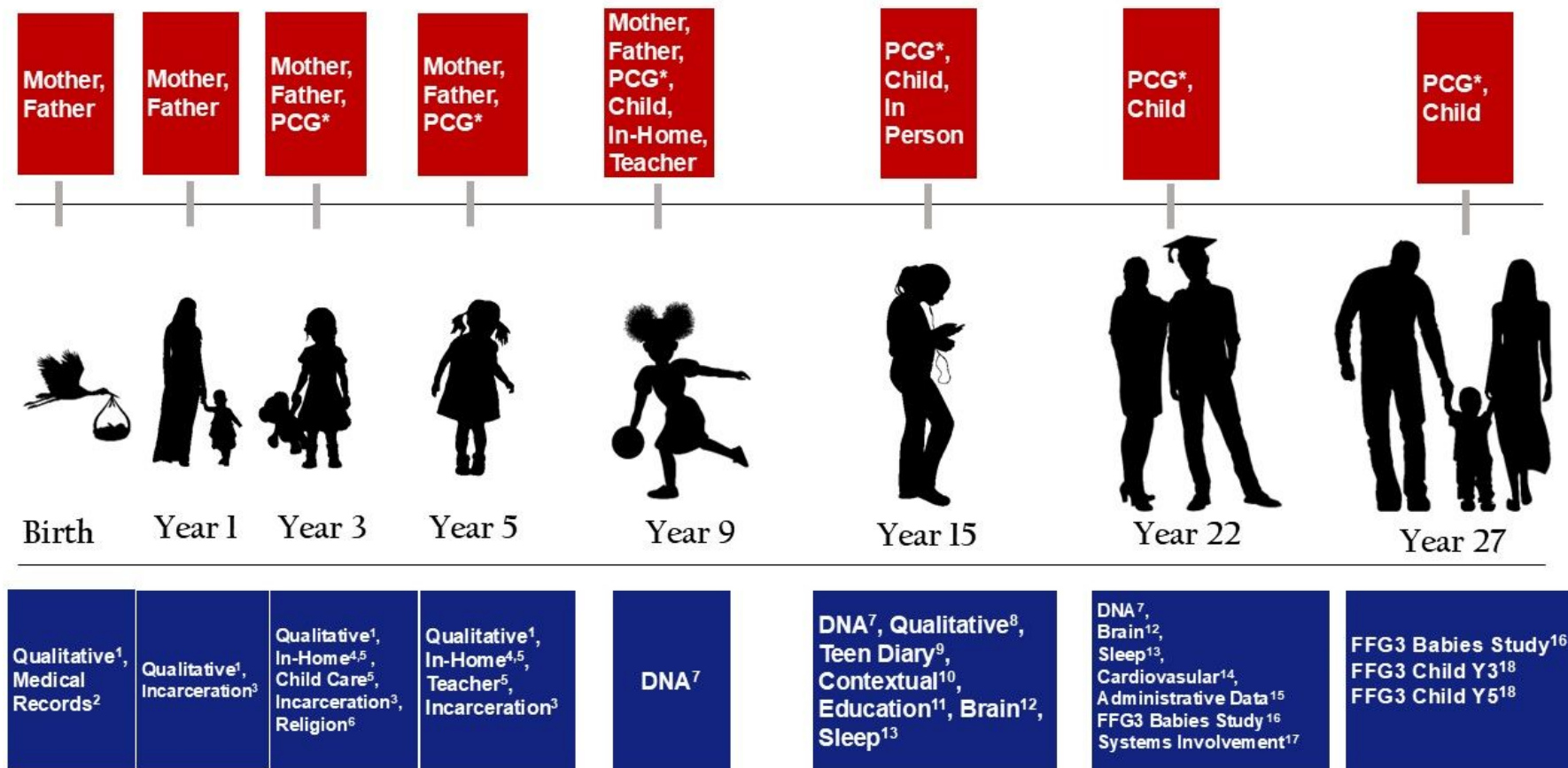|	Participated at Y22	Did not participate at Y22	Total	Estimated Rs at Y27
Young Adults	2990	1602	**4592**	3481
Primary Caregivers	2744	1855	**4599**	2848

- Data collection period: 12 months
- Panel maintenance (up to Year 29)

FFCWS: Timeline

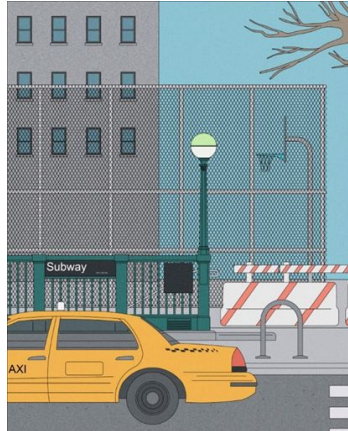|	
July	● Locating begins: Batch locating, Newsletter mailing and collect current contact details.
August - October	● Manual locating
End November	● Technical freeze for launch
January 2026	● Data collection begins - web mode only
February - March	● Non-response protocol (text, mail, email)
April	● TEL non-response follow-up and interviewing
May - December	● FTF locating and interviewing
2027 - 2029	● Panel maintenance

Legend: ■ Core Interviews (*PCG= Primary Caregiver)   ■ Collaborative Study

Core Interviews (red):

- Birth: Mother, Father
- Year 1: Mother, Father
- Year 3: Mother, Father, PCG*
- Year 5: Mother, Father, PCG*
- Year 9: Mother, Father, PCG*, Child, In-Home, Teacher
- Year 15: PCG*, Child, In Person
- Year 22: PCG*, Child
- Year 27: PCG*, Child

Collaborative Study (blue):

- Birth: Qualitative[1], Medical Records[2]
- Year 1: Qualitative[1], Incarceration[3]
- Year 3: Qualitative[1], In-Home[4,5], Child Care[5], Incarceration[3], Religion[6]
- Year 5: Qualitative[1], In-Home[4,5], Teacher[5], Incarceration[3]
- Year 9: DNA[7]
- Year 15: DNA[7], Qualitative[8], Teen Diary[9], Contextual[10], Education[11], Brain[12], Sleep[13]
- Year 22: DNA[7], Brain[12], Sleep[13], Cardiovasular[14], Administrative Data[15], FFG3 Babies Study[16], Systems Involvement[17]
- Year 27: FFG3 Babies Study[16], FFG3 Child Y3[18], FFG3 Child Y5[18]

New York City Housing & Vacancy Survey
(NYCHVS)

NYCHVS: Purpose

- Mandated by City and State of New York to report:
  - The net rental vacancy rate for NYC
  - The supply of housing
  - The condition of housing
  - Information regarding continued need for rent control and stabilization

- Data has been used to:
  - Petition for federal funding for NYC
  - Demonstrate changes in NYC's neighborhoods
  - Identify and describe patterns of segregation and inequality in NYC
 - Identify and understand unique housing needs of immigrant groups

NYCHVS: Scope

- Sampled HUs: 15,000
  - 10,650 in-person interviews, 71% RR
    - Occupied units (n=8,400)
    - Vacant units (n=2,250)
- Mode: In-person and small proportion of phone
- 30-min iw for occupied units, 15-min for vacant units
- 7 formal languages
- No Token of Appreciation (Respondent incentive)
- Systems
  - Blaise 5
  - MSMS
- Training 210 Iwers in New York City
  - 105 recruited by City University of New York (CUNY)
  - 105 recruited by SRO
  - 90% NHs
  - 65% bilingual

NYCHVS: Timeline

Pre-production	
Sampling	June - November 2025
Blaise programming & testing	May - December 2025
Systems development	June - December 2025
Recruitment & Hiring	June - December 2025
Interviewer Training	January 12 - 23, 2026
Production	
Data Collection	February 1 - August 31, 2026
Post-production	
Project closeout	September - December 2026
Data archiving	December 2026 - June 2028

NYCHVS: NYC Net Vacancy Rate 1993 - 2023

Net Vacancy Rate
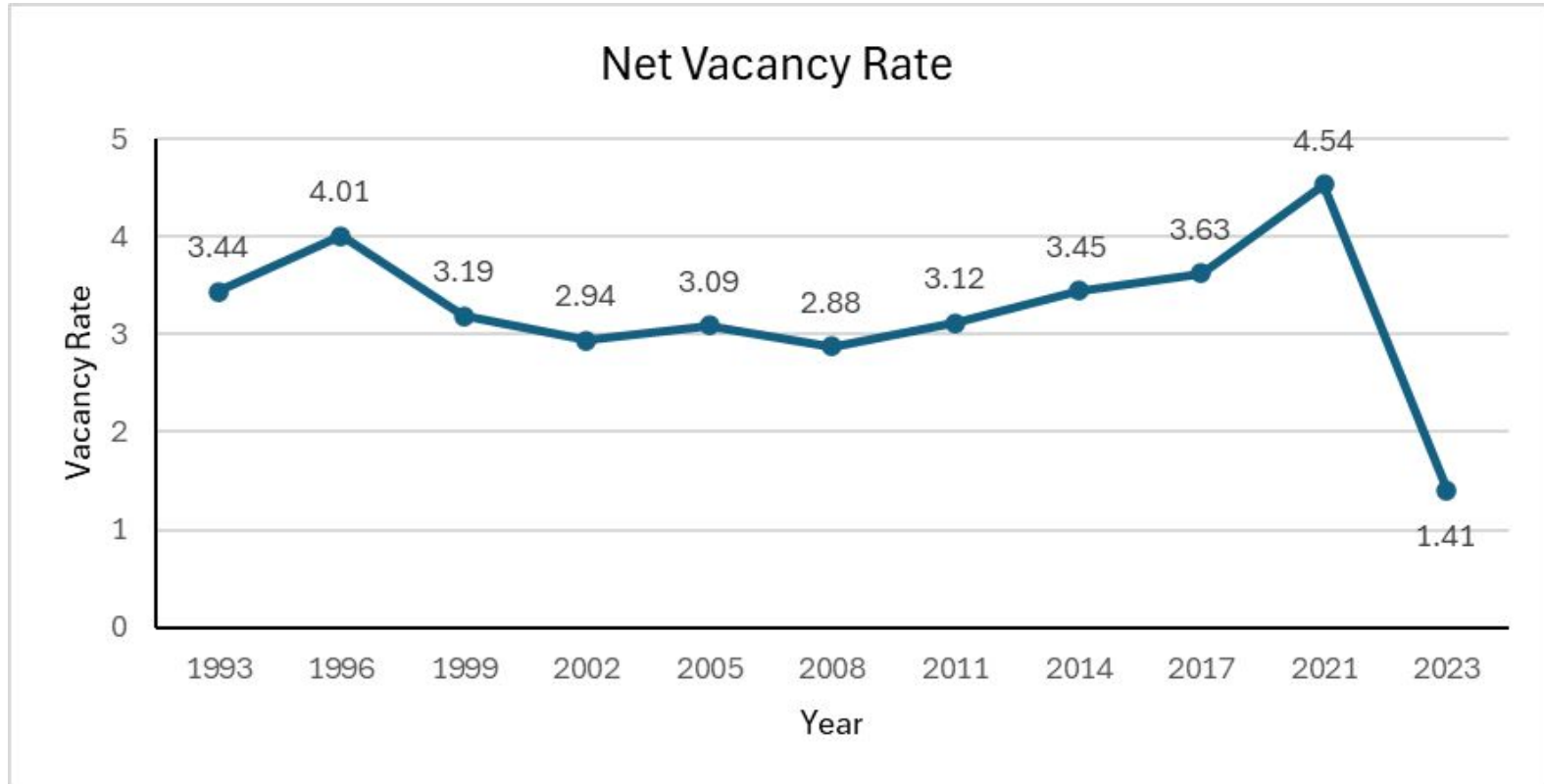
Welcome New Staff

Nicole Kirgis
she / her / hers

Dan Chapman

he / him / his
Principal Software Engineer
Technical Services Group

- **Born in Pennsylvania but has lived in Ohio, Michigan, New York, and Kentucky.**
- **Got into computers as a kid through a love of puzzles and games.**
- **Lives in Romulus with his wife, dog, and daughter—who's getting ready to move out on her own again.**
- **Organizes and supports gaming communities, including coordinating conventions.**

Saray Gonzalez

she / her / hers

Survey Specialist Intermediate
Data Collection Operations

- Name pronounced like Sara Lee but without the L
- LA transplant currently living in NYC
- Studied Chemistry (undergrad) and Public Health Epidemiology (grad)
- Loves: Bob's Burgers, her maltipoo "Snowbun," reliable public transportation
- Does not love: Wobbly tables, leaky coffee lids, humid summers

# Joseph Zylka

he / him / his

Financial Analyst Intermediate
Financial Services Group

- MBA from EMU, BBA in Accounting from U-M-Dearborn
- Before SRO, worked at DTE Energy
- Hobbies: exercising, reading newspapers and magazines, and exploring cities from Ann Arbor to around the world

Other Hiring In-progress

- Research Team Leader position in DCO
    - Hiring several Team Leaders/PC in regular positions
    - 12-month fixed term, benefits
    - First assignment will be MGenX (component of HRS)
    - Assess the feasibility of regular field positions

Wellness Committee Update
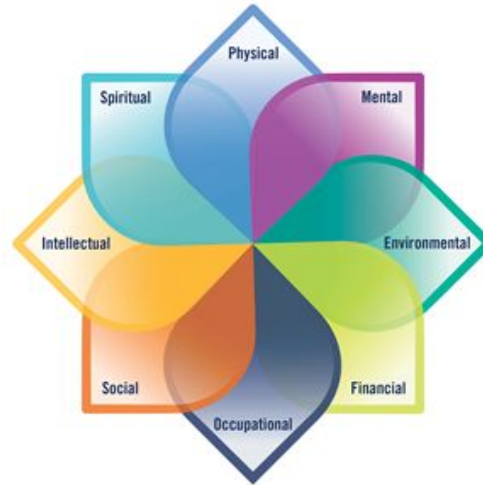
Who we are/what we do

- Focus on U-M's model of well-being and its eight dimensions of wellness—physical, mental, environmental, financial, oc social, intellectual, and spiritual
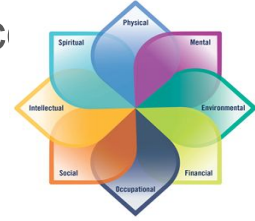
- Members: Ashanti Harris (Lead), Rebecca Gatward, Nicole Kirgis, Debbie Seale, Jeff Smith, and Deb Wilson

- Promote available U-M resources and programs

Recent events and upcoming summer events

Recent:

- 2025 Commuter Challenge

- Freecycle event

Upcoming:

- Farmer's market walks

- Ice cream walks

Have ideas? Please let us know! Email: "SRO Wellness Committee" or
srowellcomm@umich.edu