

# Welcome!



- Place donations on the designated table
- This is a compostable event—Compost cups, plates, and utensils. Questions? Ask our Green Team members: Ann or Bree
- Please enjoy lunch!
- Presentations begin at **12:30**



# SRO All-Staff Meeting

Dec 3, 2025



# Today's Agenda

- SRO Director Remarks
  - End-of-year report
  - SRO updates
- Finance Update
- Project Updates
- Welcome New Colleagues
- Group Picture

# SRO Director Remarks

Stephanie Chardoul  
she / her / hers





# INTRANET

SRO Global Status Sheet



[Home](#) [Proposals](#) [Project Management](#) [Finance](#) [Data Collection](#) [Technical Services](#) [Employee Resources](#)

## SRO Closure Day - November 26th

### Key Updates:

[CRS Data Updated](#) – Nov. 7  
[Key Production Dates](#) – Nov. 21  
[Happening in SRO](#) – Oct. 31

### Quick Links

[Computing Help Requests](#)  
[Duplicating](#)  
[Facilities Requests](#)  
[ISR Intranet](#)  
[ISR Staff Directory](#)

### About SRO

[Acronym List](#)  
[All Staff Meetings](#)  
[Email Group Directory](#)  
[Events Calendar for SRO](#)  
[Fiscal Year End Report \(FY 24\)](#)  
[Media Repository \(Videos\)](#)  
[Organization Charts](#)  
[Perry Floor Maps](#)  
[Staff Directory](#)  
[Staff Photo Program](#)  
[Wellness Program](#)

### Best Practices

[Archives and Records](#)  
[Collaboration Guidelines](#)  
[Cross-Cultural Survey Guidelines](#)  
[Signature Guidelines](#)  
[SRO Best Practices](#)  
[SRO Meeting Norms](#)  
[SRO Style Guide](#)  
[SRO Work Schedules](#)  
[Survey Process Forum](#)

### Technical Systems

[CRS](#)  
[FRED](#)  
[MPR Administration](#)  
[ODS Portal \(PQT, PIPPA, Report Portal\)](#)  
[OLIVE 4.0](#)  
[Resource Forecasting Tool](#)  
[WebTrak Launch Page](#)  
[More information >>>](#)

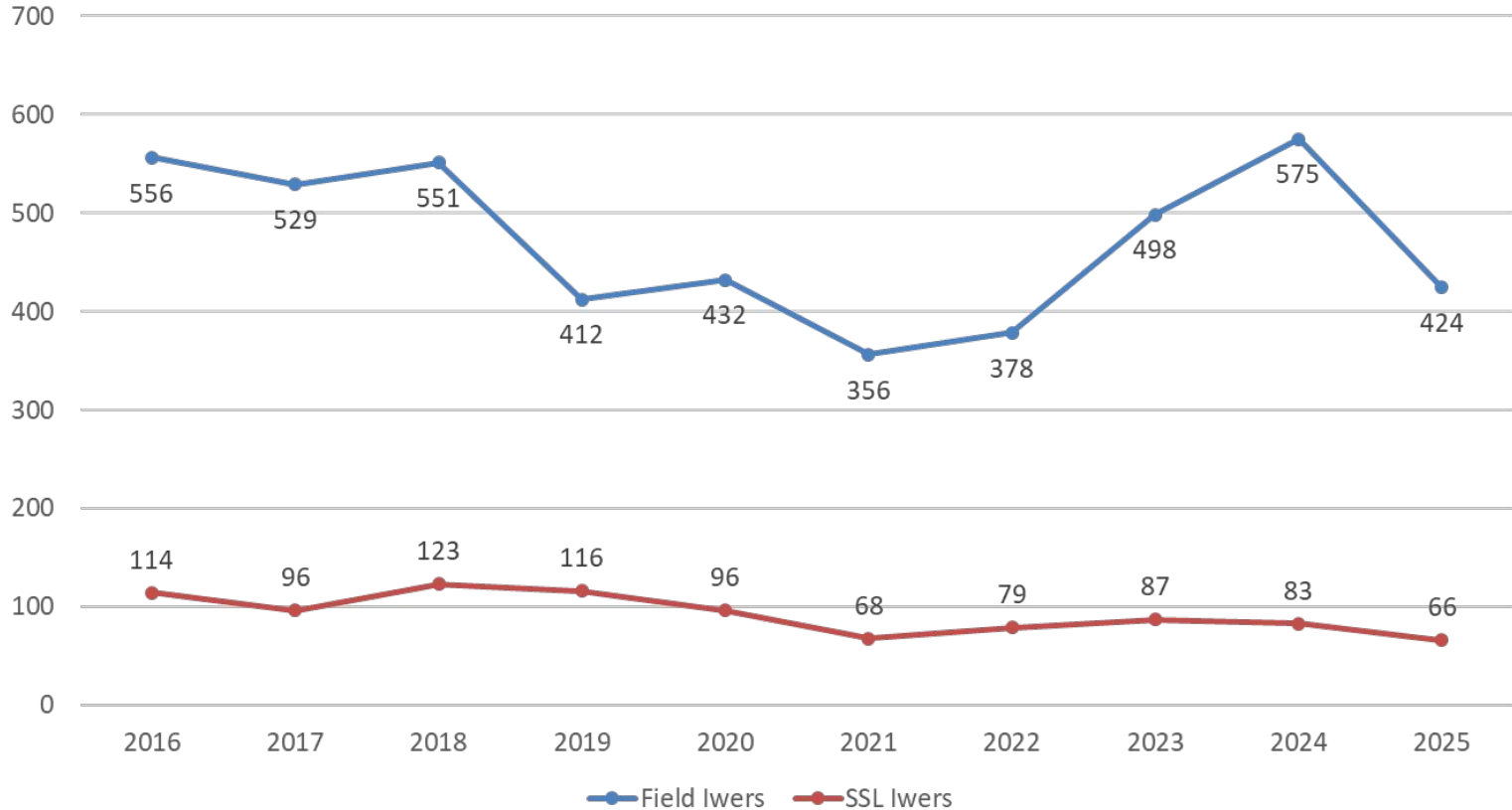
Monday, December 1, 2025

From the report...

# A Different Look at Volume in FY25

- SRO worked on 55 unique projects. Six of those projects had multiple funding mechanisms
- Volumes continued to be very high. We processed 10,520 interviewer expense reports totaling \$2,744,602 (vs. 8,716 in FY24) and 1,258 travel advances (1,451 in FY24)
- We processed \$1,328,428 in respondent payments (\$1,092,807 in FY24)
- We reimbursed \$1,485,903 for mileage (\$1,173,804 in FY24), which is 2,122,7198 miles!
- A total of 175 new interviewers were hired in FY25, with 172 in the field and 3 in the SSL

# SRO Data Collection staff - counts by year





# Survey design consultations

- In FY25, SRO provided consultation in sampling design, questionnaire design, or data collection best practices to 125 research initiatives outside of SRO
  - 104 (up from 70 in FY24) for U-M departments or Michigan Medicine
  - 15 for external colleges and universities
  - 6 for various foundations, institutes, private companies

# Building a mail and assembly space

- In order to better support project needs for mail assembly, kitting, and return logging, a cross-unit group met to design a flexible space
- We installed movable, fully adjustable tables, more ergonomically designed
- Provided movable shelving to open up the space



## RPay: New methods

- In June, JPMorgan Concourse was updated to allow Venmo and PayPal as payment options.
- The Zelle payment option was also reinstated.
- To-date, the PSID Suite studies are unique in SRO in offering Concourse payment. Venmo, PayPal, and Zelle are very popular options.
- This FY marked increased use of the Tango Card/Qualtrics integration across projects, allowing immediate payment via electronic gift card with very few payment problems compared to past prepaid card options.

# Special Teams: Clinical Contact Program (CCP)

- The SRO-CCP Supports all SRO projects.
- STARRS-LS generated 82% of all referrals.
- A 35% decrease in total referral count was observed from last year (613 vs. 937). This was mainly due to fewer referrals from STARRS-LS, which was in pre-production or early data collection for half of this reporting period.

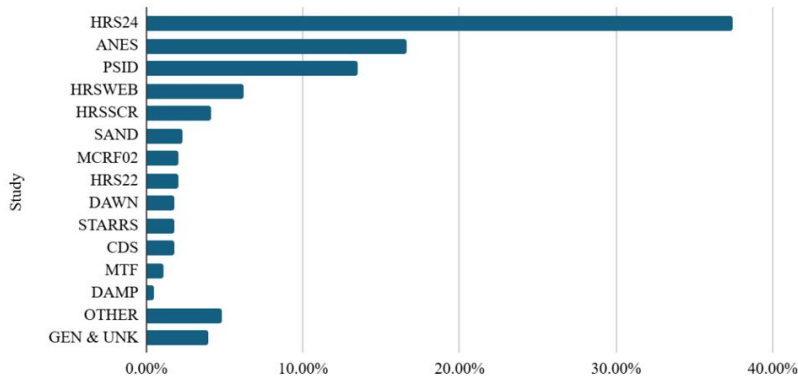
**SRO-CCP Referral Counts, by Project (7/1/24 – 6/30/25)**

<b>Project Name</b>	<b>Referral Counts</b>
Study to Assess Risk and Resilience in Servicemembers-Longitudinal W4 & W5	504
Health and Retirement Study	86
Michigan COVID-19 Recovery Surveillance Cohort Study	5
Baby's First Years	4
Detroit Area Wellness Program - COVID Supplement	4
Panel Study of Income Dynamics Core 2025	4
PSID Childhood Development Supplement	4
Concussion Assessment, Research and Education (CARE) Consortium	1
2022 - Military	
Social Relations 2022	1
<b>Total</b>	<b>613</b>

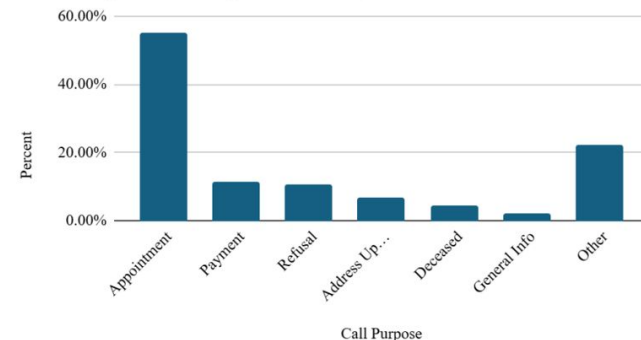
# Special Teams: Respondent Connection Team (RCT)

- RCT supports all SRO projects by addressing inbound respondent calls
- Volume was up 4% from last year, with the RCT answering 7,316 calls
- HRS 2024 accounted for over 37% of total calls, with the HRS Suite (HRS 2024, HRS Web, HRS Screening, and HRS 2022) jointly accounting for 50% of the total call volume
- Most of the calls were related to following up on an appointment (55%)

Call Distribution by Study



Call Purpose (Multiple Mentions)



# Special Teams: Technical Support

The SRO Technical Support team provides 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. In FY25, they are now monitoring SRO's infrastructure and application performance using Cloud Splunk.

## Projects

Technical support provided support for **21 projects** throughout the year.

## Training

Technical support supported **25 different interviewer** trainings for a total of **106 days** throughout the year. These trainings included both in person and remote training support for field and lab interviewers plus internal staff.

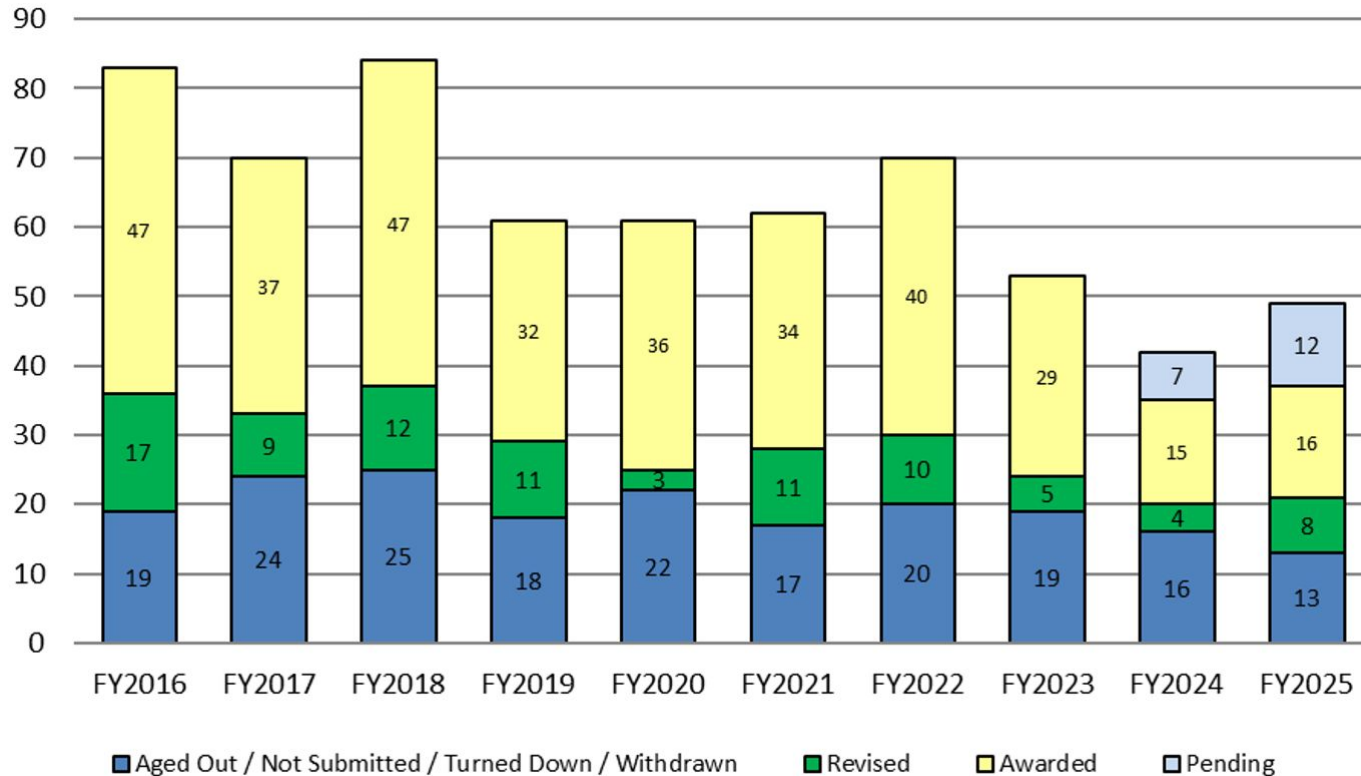
## Support Tickets

Technical support processed **6,473 tickets** throughout the year and closed **5,122** of those tickets that were not transferred to other teams.

## Equipment

Technical support supported approximately **530 cell phones**, **460 tablets** and **500 laptops** at various times throughout the year.

# Number of formal proposals by disposition



# Accessibility updates

- U-M is following Federal guidelines to update public-facing sites and materials to current accessibility standards
- You may have seen some of the ISR trainings on how to modify sites and documents – some of you have attended the trainings
- Note that the focus (for now) is on **digital** materials that are available to the public (e.g. project websites, conference presentations, .pdf's of published papers, etc.)
- We do not need to worry (yet) about our own tech systems or tools used by staff, or about printed/hard copy materials (such as respondent brochures, show cards, etc.)
- But... good to be aware of the general principles and apply them when feasible
- <https://brand.umich.edu/design-resources/accessibility/>



# AI in SRO

- It feels urgent – what is too fast or too much?
- Responsible approach (maintain human-ness, mindful of impact), but, if AI for survey research is going to be explored, who better than SRO??

## Guidelines

- Any data that can be classified as “Sensitive Identifiable Human Subject Research” will not be permitted
  - Although ITS has approved the use of U-M GPT with prompts that include PII and other moderately sensitive data, *SRO policy is more restrictive unless users receive explicit permission from SRO Admin Team*
- No respondent or employee data will be used as a prompt
- No portion of a proprietary survey instrument should be used as a prompt or input into a model

# AI in SRO

- SRO Survey Process Forum is hosting an *AI Series* in 2026 (monthly sessions starting February)
- Opening session will be a presentation by Alexis Castellanos (ISR data scientist) – focus on U-M supported tools, governance, and data sensitivity
- SRO colleagues showcasing their own work and applications: TSG, DCO, PDMG & DMSS

We don't need to rush – we're in a great position to creatively and mindfully enhance our own work and contribute to the field. Here we go!

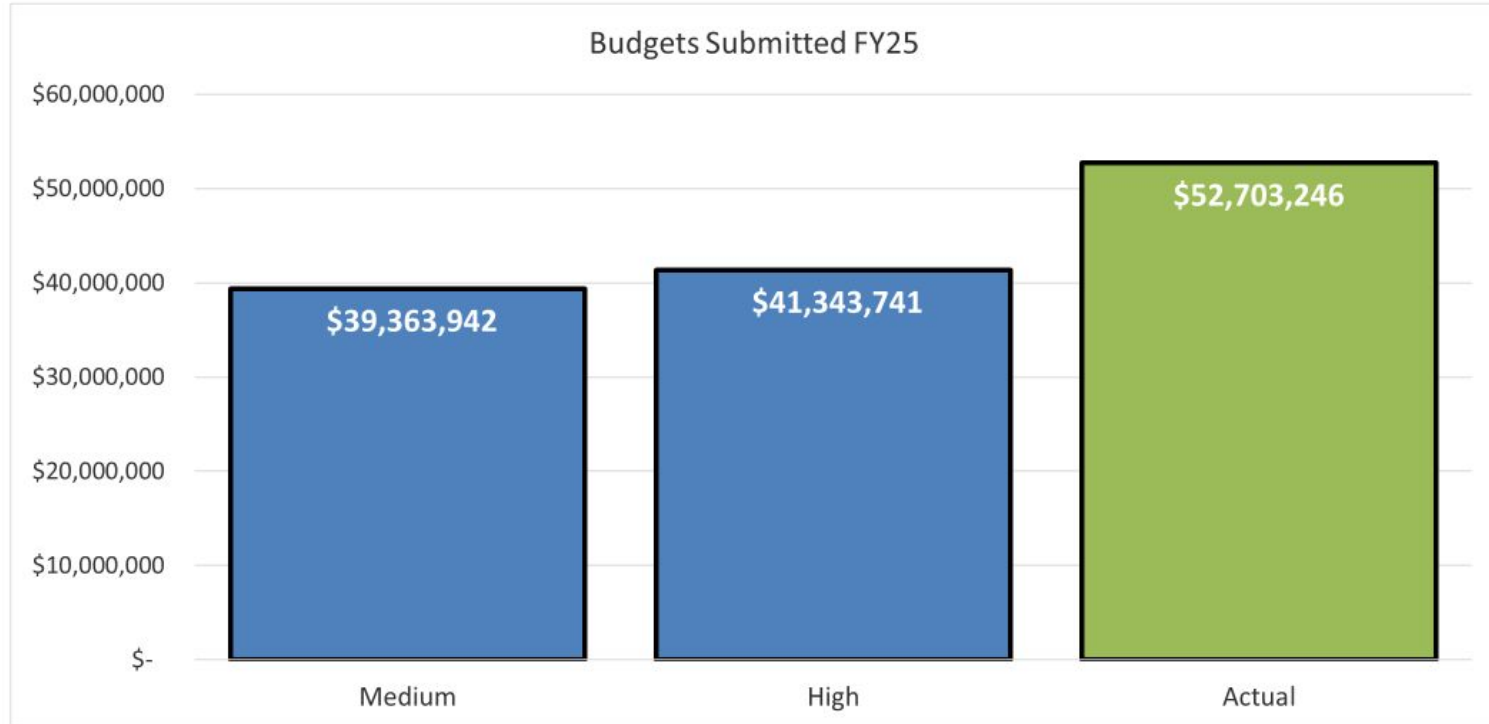
# Q & A

# SRO Finance

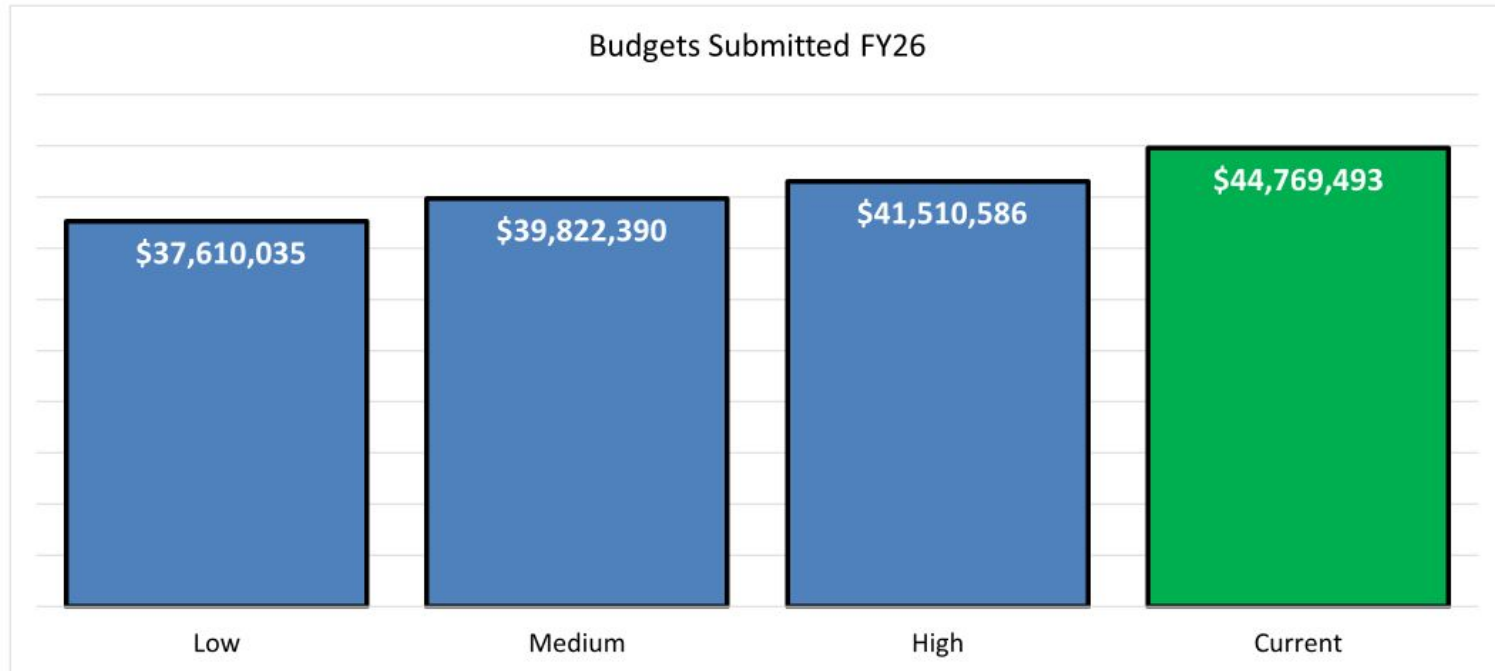
Ryan Neice



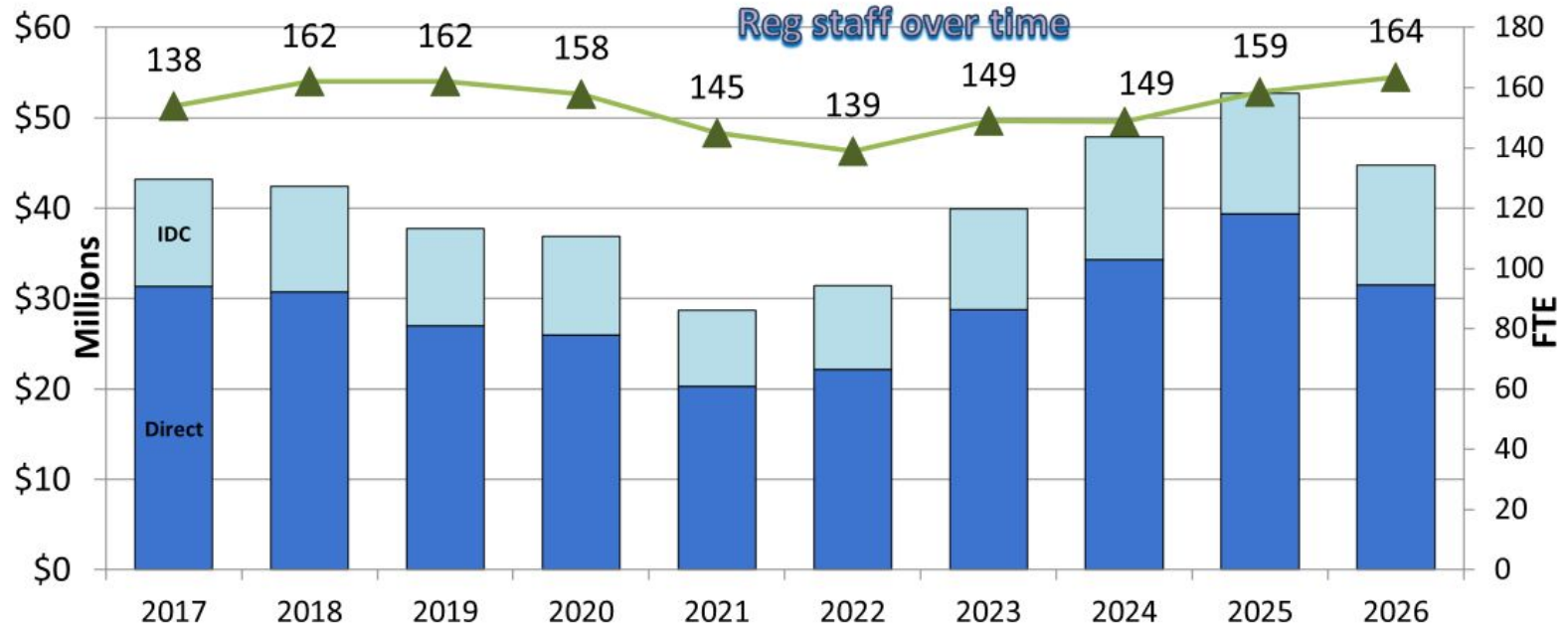
# Fiscal Year 25 financial summary



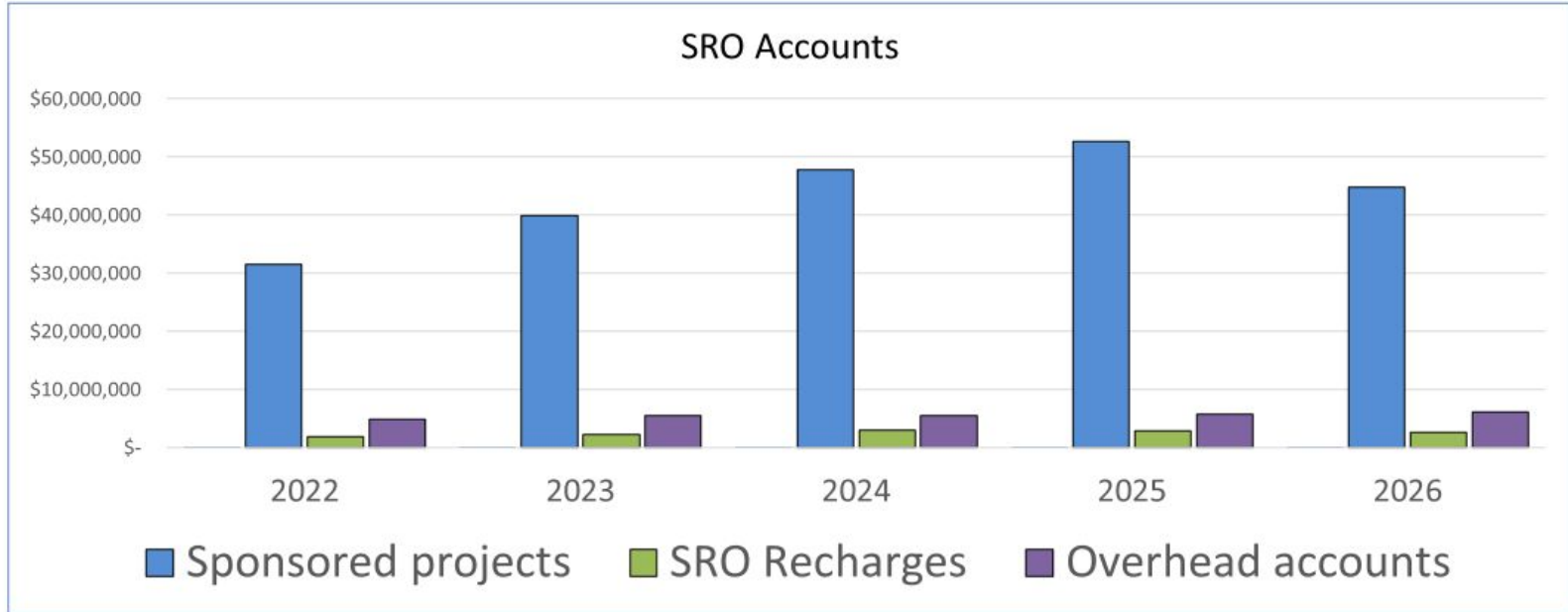
# Fiscal Year 26 financial outlook – December 2025



# SRO revenues and regular staff over time



# SRO Revenues vs. Other SRO Accounts





Questions???



# Project/Initiative Updates

Shonda Kruger Ndiaye  
she / her / hers



## Four Slide Rapid Update Structure

- Study Purpose
- SRO Scope
- High Level Timeline
- Visual

## Featured Projects

- Safeguard (Dan Tomlin)
- NSAL (Barb Ward)
- M-PANEL (Lisa Holland)
- Future of Surveys Initiatives (Grant Benson)

**Safeguard**

# Safeguard: Purpose

- Life Force
  - Evaluate the effectiveness of the Life Force program, a remote, targeted skills training program for increasing mental toughness and resilience in active duty service members
- Life Skills Training
  - Examine effectiveness of Life Skills Training
    - Emphasizes meaningful activities, goals and plans, healthy thinking and routines, social interactions
- Pathfinding
  - Case management program designed to reduce suicides among servicemembers after psychiatric discharge
  - Intended to help transition from hospitalization to community

# Safeguard: Scope of SRO Work

- Life Force (enroll 3000)
  - Baseline
    - Develop technical systems for a self-administered web survey using Blaise 5 and WSMS
  - Follow-Up
    - Develop technical systems for a 6 month and 12 month follow-up survey administered via web and phone (Blaise 5 MSMS)
- Life Skills Training (enroll 5000)
  - Baseline
    - Develop technical systems for a self-administered web survey using Blaise 5 and WSMS
  - Follow-Up
    - Develop technical systems for a 1, 3, and 6 month follow-up survey administered via web and phone (Blaise 5 MSMS)
- Pathfinding (enroll 1200)
  - Baseline
    - Develop technical systems for an interviewer administered survey to be conducted over the phone using Blais 5 and WSMS
  - Follow-Up
    - Develop technical systems for a 6 month and 12 month follow-up survey administered via web and phone (Blaise 5 MSMS)

# Safeguard: Timeline

- **Life Force**
  - Production: December 2025 - December 2027
- **Life Skills Training**
  - Production: December 2025 - June 2027
- **Pathfinding**
  - Production: January 2026 - January 2028



# Safeguard Collaborators





# National Survey of American Life

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25 Year Follow-Up



# NSAL: Purpose



**National Survey  
of American Life**

25 Year Follow-Up

- Investigate psychological, biological, and social factors affecting Alzheimer's Disease and Related Dementias (ADRD) in Black and lower-income White Americans by conducting a 20+ year follow-up of the National Survey of American Life (NSAL, n~7,000 people)
- Initial Wave of data collection: 2001-2003

# NSAL: Scope of SRO Work



- 2,600 interviews over 18 months with respondents who last participated in 2001-2003
  - 1485 in-person, 890 decentralized phone, 150 decentralized proxy-phone interviews
  - 75 pilot in-person interviews in Michigan (Detroit, Grand Rapids, K'zoo)
- 2.5 hour in-person interview (2 hour telephone, 45 mins proxy)
  - Survey questions, CIDI modules, biometrics (blood pressure, height, weight, waist measurements plus one other measurement), 30-min cognitive assessment battery, speech pattern recording, consent for a whole blood draw
- 8-day study-specific training in Ann Arbor (hopefully ISR facilities)
- Technical systems: Blaise 5, Nautilus

# NSAL: Timeline



**National Survey  
of American Life**

25 Year Follow-Up

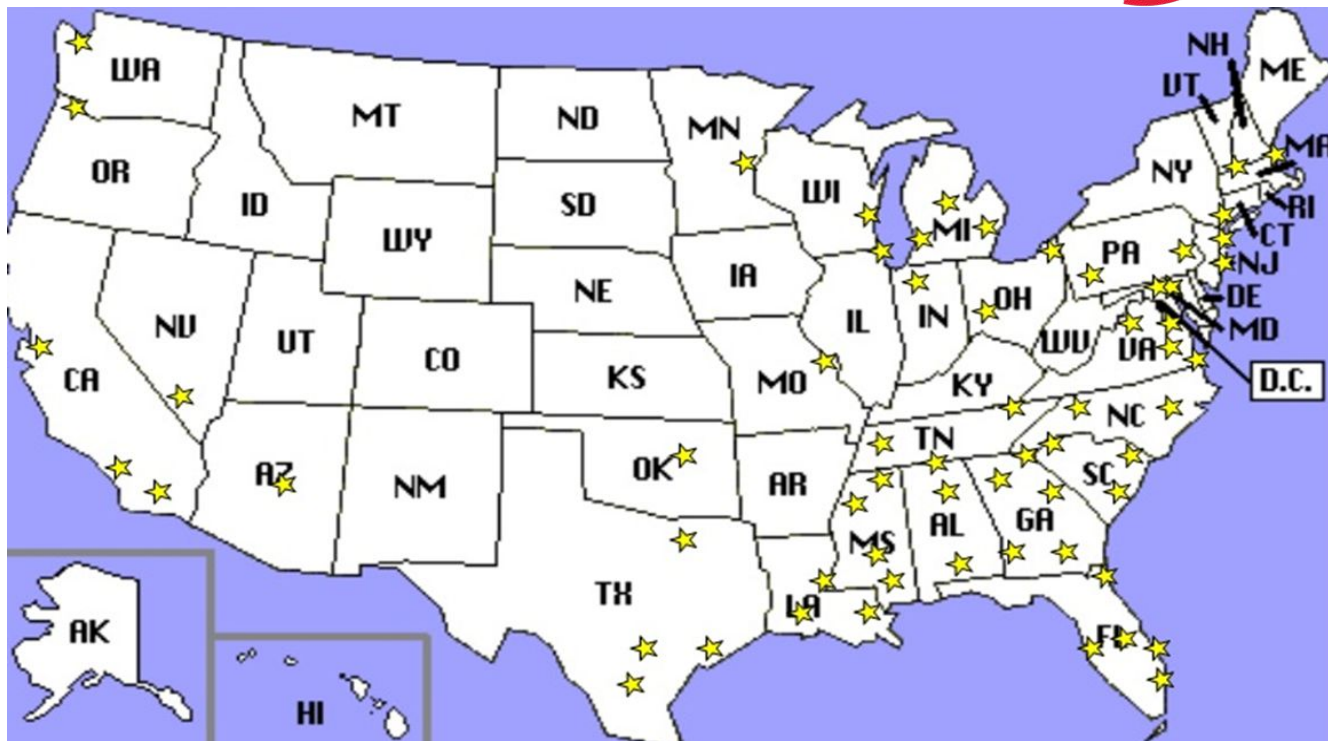
- Pilot training late June 2026
- Pilot production July-Aug 2026
- Production training – early Nov 2026 (could get pushed to Jan 2027)
- Production interviewing (18 months) Nov 2026 – May 2028

# 2001 NSAL Sampling Areas



**National Survey  
of American Life**

25 Year Follow-Up



# **M-Panel**

**(working title)**

## M-Panel: Purpose

- To develop, recruit, and maintain an online probability panel of adults in the U.S.
  - Create efficiencies in data collection by sharing recruitment and operational costs across projects
- Goals of creating this infrastructure for SRC/SRO include:
  - Expand SRC research capabilities
  - Create cost efficiencies for smaller data collection efforts
  - Develop methodologies for panel recruitment and retention
  - Maintain infrastructure to allow future expansions



# M-Panel: Scope of SRO Work

- Initial Recruitment
  - Large, Address-Based Probability Sample (~45,000 Households)
  - Mail “push to web” for initial recruitment
  - \$2 visible cash incentive with initial mailing
  - Phone reminders to non-responders
  - Web/paper/phone survey response
  - New panel members complete a “Profile” survey with key characteristics
  - \$20 incentive for completing the Profile survey
  - Seek to recruit 6,750 panel members
  - Annual refresher samples

# M-Panel: Scope of SRO Work (continued)

- “Omnibus” surveys
  - Delivered quarterly to start
  - Plan to increase the frequency of surveys (e.g., monthly)
  - \$15 incentive for completion of a survey, and Email/Mail/Telephone follow-up with panel members who do not immediately respond
  - Expect 3,000 respondents to a given survey
- Leadership
  - James Wagner, Scientific Director
  - Stephanie Chardoul, Managing Director
  - Piotr Dworak, Project Lead
  - Lisa Holland, SPA
  - SMP Contributors Brady West and Henning Silber

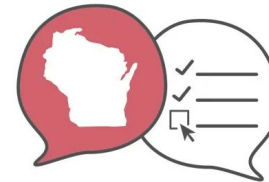
## M-Panel: Timeline

- October 2024 - Original committee formed
- October 2025 - SRC Faculty voted to approve launch
- December 2025 - Planning meetings begin
- January 2026 - Pre-production begins
- April 2026 - Begin recruitment data collection (4 monthly replicates)
- August 2026 - First quarterly Omnibus survey (1/2 sample)
- November 2026 - Second quarterly Omnibus survey (full sample)

# M-Panel: Probability Panels Worldwide



UnderstandingAmericaStudy



WISCONSAYS



Norwegian Citizen Panel

# **Future of Surveys Initiatives**

# Future of Surveys Initiatives: Purpose

- Address the Primary Threats to Response Rates
- Proposals for Investing in the Next Generation of Survey Research
  - Using Automatic Speech Recognition (ASR) for QC and Translation
    - Minako Edgar, Hueichun Peng, Cheng Zhou, Asia Paige, Sarah Broumand, Grant Benson
  - Media Mentions Dashboard
    - TBD
  - Centralized Materials Repository
    - TBD

# Future of Surveys Initiatives: Scope of SRO Work

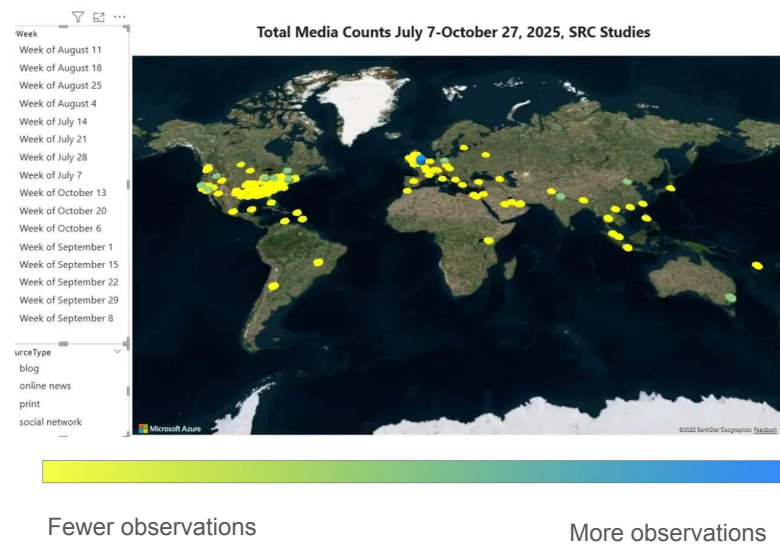
- Automatic Speech Recognition (ASR) for QC and Translation
  - Automate transcription of interviews and match to survey data
  - Train LLM to code survey administration for QC
- Media Mentions Dashboard
  - Dashboard design and implementation
- Centralized Materials Repository
  - Develop and implement website for hosting materials
  - Implement campaign to collect the data from throughout SRC

# Future of Surveys Initiatives: Timeline

- ASR for QC and Translation
  - Nov/Dec 2025 – Automate transcription, translation, data matching
  - Dec 2025/Jan 2026 – Implement and fine tune LLM
  - Feb 2026 – NYCHVS Field Test
  - Mar/Apr 2026 – Final report and recommendation
- Media Mentions Dashboard
  - Nov 2025/Jan 2026 – Report design
  - Jan/Feb 2026 – Report implementation
  - Mar/Apr 2026 – Feedback and media strategy sessions
  - May 2026 – Final report
- Centralized Materials Repository
  - Feb/Mar 2026 – Website development
  - Mar/Apr 2026 – Call for materials



# Digital Media Mentions of SRC Studies July-October 2025



Mentions of ANES, HRS, MTF, NYCHVS, PSID, SCA, STARRS

Unique Mentions	39,352
Countries Mentioning SRC Studies	131
Country Mean/Median # Online News Mentions	261.2 / 3.5
Country Mean/Median # Social Network Mentions	41.6 / 2.0

**Total Estimated Views on 29.7% of Mentions: 152,414,889**

# MSMS/Nautilus Updates

Jim Rodgers  
he / him / his



# Why Nautilus?

- The word “Nautilus” comes from Latin *nautilus*, “sails like a vessel,” and from Ancient Greek *naûs*, “ship,” and *nautílos*, “sailor.”
- The cephalopod that makes the shell adds chambers to the shell as it grows, so the shell — with its graceful, spiraling chambers — serves as a symbol of continuous growth and evolution.
- We feel the imagery of the shell represents the way in which we are moving into a new product that builds on the strengths and fixes the flaws of MSMS.

Moving forward, the current version will continue to be known as MSMS, while the next-generation platform will carry the Nautilus name, marking this major step forward in our product’s development.

# Nautilus – Release Dates

Feature	Estimated Delivery	Nautilus	Nautilus – Big Apple	MSMS
Project-defined Sample Line and NAPE attributes	Existing	✓	✓	✓
Modern security protocols and standards	Dec 2025	✓	✓	
Performance and reliability improvements	Feb 2026 and ongoing	✓		
Tools for external apps and services, e.g., new APIs	Feb 2026 and ongoing	✓		
Standard NAPE schema	Feb 2026	✓		
Project-defined records, e.g., payments, letters	Feb 2026	✓		
DCA UI improvements	Feb 2026 and ongoing	✓		
Contact attempt improvements, e.g., outcome reasons	TBD	✓		
Support for Blaise 4				✓

# Projects – Current Plan

## MSMS

- BFY Age 3 – active
- STARRS LS W5 – active
- HRS 2024 Web Panel – active
- PSID Core 2025 – active
- FFCWS locating – active
- HRS MGenX web – active
- TAS 2025 – active
- Current verification projects
- FFCWS web/CATI/CAPI
- Safeguard Life Skills follow up

## Nautilus

- NYCHVS (Big Apple Release)
- HRS 2026 Web Panel
- Safeguard Pathfinding follow up
- Safeguard Life Force follow up
- HRS MGenX Continuous Recruitment
- STARRS LS W6
- New verification projects
- Other new projects

# Welcome New Staff

Nicole Kirgis  
she / her / hers



# Kristi Carlile

she / her / hers

**Research Team Leader Intermediate  
Data Collection Operations**

- Lives in Texas. Started working for U-M in 2002 as an interviewer.
- U-M is her third career: 1. RN specializing in emergency medicine, 2. worked in the music industry in live music production support.
- Fun Fact: For most of her life, she was older than her mother! (Her mother was born on 2/29 so she only had a birthday every 4 years. It didn't take long to surpass her in age.)





# Ramsey Clifton

she / her / hers

**Research Team Leader Intermediate  
Data Collection Operations**

- Has worked as a temporary staff member in DCO for the past 12 years.
- Prior to that, was a stay-at-home mom homeschooling and raising 4 amazing children.
- Raises Monarch Butterflies, which are now on the endangered species list.
- Enjoys gardening, traveling, and being a grandmother to 4 adorable grandkids.





# Caroline Ellison

she / her / hers

**Research Team Leader Senior  
Data Collection Operations**

- Lives, works, and plays in the western suburbs of Philadelphia, PA. Go Birds!
- Started with SRO as an interviewer in 2003, has worked remotely for U-M ever since. Go Blue!
- In her spare time, she volunteers and fosters for a local rescue, All 4 Paws. Go dogs!
- Hobbies: Reading and playing with cute puppies who she gets to love on until they're adopted.

# DianaKaren Guzman

she / her / hers

**Research Team Leader Intermediate  
Data Collection Operations**

- Spent most of her life growing up between California and Mexico City.
- Graduated from CSU Fresno with a Bachelor of Science in Public Health, with a focus on Health Administration.
- Fun facts: Loves running, basketball (huge Golden State Warriors fan), and traveling around the world with her fiancé.



# Katy Lemmer

she / her / hers

**Meetings & Special Events Assistant**  
**Data Collection Operations**

- Grew up in Ann Arbor.
- Has a Bachelor's degree in Marketing from Xavier University in Cincinnati, Ohio.
- Enjoys watching and attending sporting events. Is a U-M Athletics Event Team Member.
- Fun fact: Went to school with Detroit Lions defensive end Aidan Hutchinson.







# Dan O'Brien

he / him / his

**Research Team Leader Intermediate  
Data Collection Operations**

- From Long Island, New York
- BA in Criminology and Research  
Methods & Statistics from CUNY John  
Jay College
- Enjoys writing short stories and  
poetry, spending time outdoors, and  
exploring new places

# Sarah Pettigrew

she / her / hers

Financial Analyst

Financial Services Group

- Originally from the NW Suburbs of Chicago
- Worked remotely at Sirva Relocation as an international business analyst/auditor prior to family moving abroad to Japan
- Attended Southeast Missouri State University
  - Majors: International Business and Spanish
  - Minor: Accounting
- Interests: traveling, sports (soccer, tennis, volleyball), reading, and puzzles



## More New Hires...

- DCO-SSL hiring for Survey Specialist Senior(s)
- Posting open until December 12

## Reminder!

- SRO Closure Day on Friday, January 2\*
- 2026 Closure Day schedule in January edition of SRO Happening newsletter
- Closure days also posted on the SRO Events Google calendar

\*Bi-weekly ET due on January 2; please complete before the break!

**Thank you SRO!**

**Up next...Lee Ridley (SRC) for a group picture,  
including those on Zoom!**



# Group Pic!

