



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

SRO Fiscal Year 2025 Year-End Report

October 2025



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

In FY2025, our activity and the variety of new projects continued to grow. We once again surpassed our expectations for sponsored budgets.

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



Fiscal Year 2025 Financial Summary



FY2025 Financial Overview

- We completed \$52.7M in total **sponsored** project work, generating \$13.3M in indirect cost recovery fees (IDC).
 - Represents a 1.4% *decrease* in IDC volume compared with FY24. SRO generated an effective IDC rate* of 33.9% in 2025, which is lower than the effective rates SRO has experienced over the last five fiscal years.
 - In FY25, we exceeded our highest estimate for sponsored budget expectations by \$11.4M in total, and had \$4.9M more sponsored volume than in FY24.
 - We had a \$6.1M operations (overhead) budget allocation and ended the year with an underrun of \$386K (6.3% underrun).

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



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 FY26 ranging from most conservative (i.e., Low Budget) to most aggressive (i.e., High Budget).

	Actuals					FY2026 Budget		
	2021	2022	2023	2024	2025	Low	Med	High
Direct Costs	20,296,936	22,169,619	28,747,594	34,312,471	39,370,568	26,241,179	27,784,779	28,866,955
Indirect Costs and Fees	8,378,918	9,290,116	11,155,720	13,528,083	13,332,679	11,368,856	12,037,612	12,643,632
Total Sponsored Costs	28,675,855	31,459,735	39,903,314	47,840,553	52,703,246	37,610,036	39,822,390	41,510,587
Effective IDC Rate	41.3%	41.9%	38.8%	39.4%	33.9%	43.3%	43.3%	43.8%

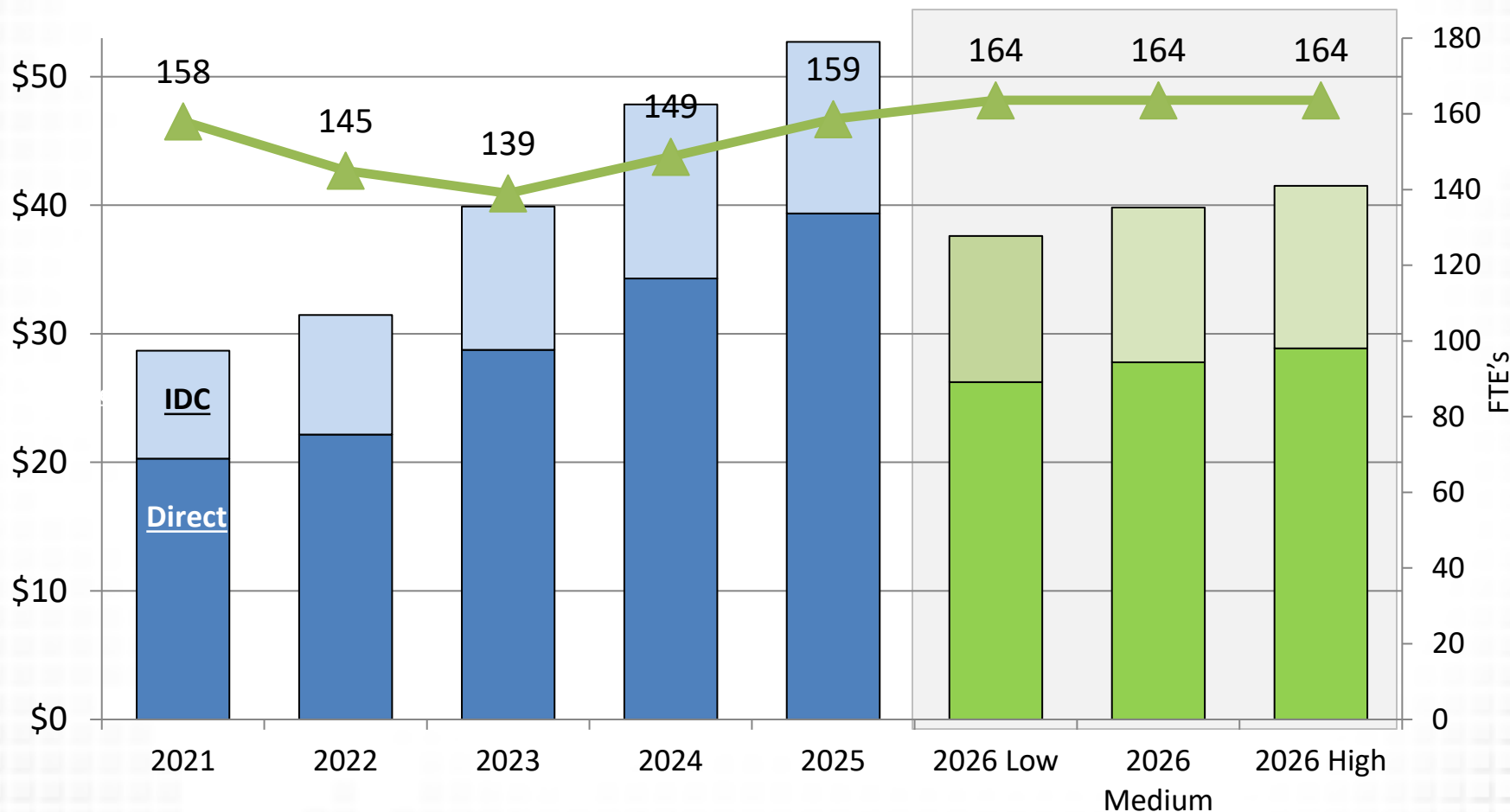
Also known as IDC, these are the fees we receive over and above what we directly charge to projects (Direct Costs). They are designed to cover overhead expenses (e.g. keeping the lights on) and other expenses that cannot be directly billed to projects.

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)



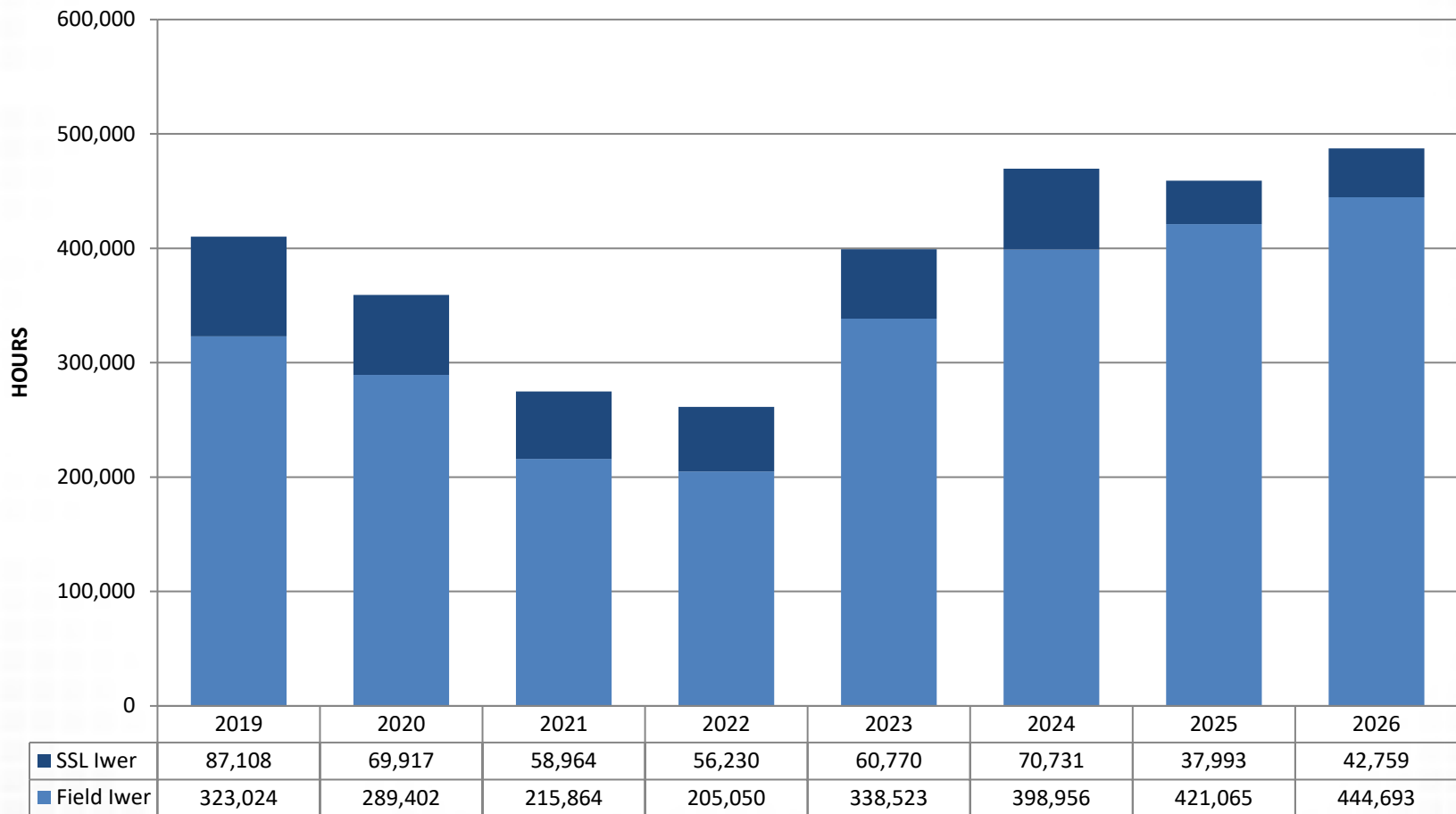


A Different Look at Volume in FY25

- SRO worked on 55 unique projects. Six 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 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 payment reimbursements (\$1,092,807 in FY24).
- We reimbursed \$1,485,903 for mileage, which is 2,122,719 miles (\$1,173,804 in FY24)!
- A total of 175 new interviewers were hired in FY25, with 172 in the field and 3 in the SSL. In 2024, we hired 312 in the field and 59 in the SSL.



Interviewer Hours

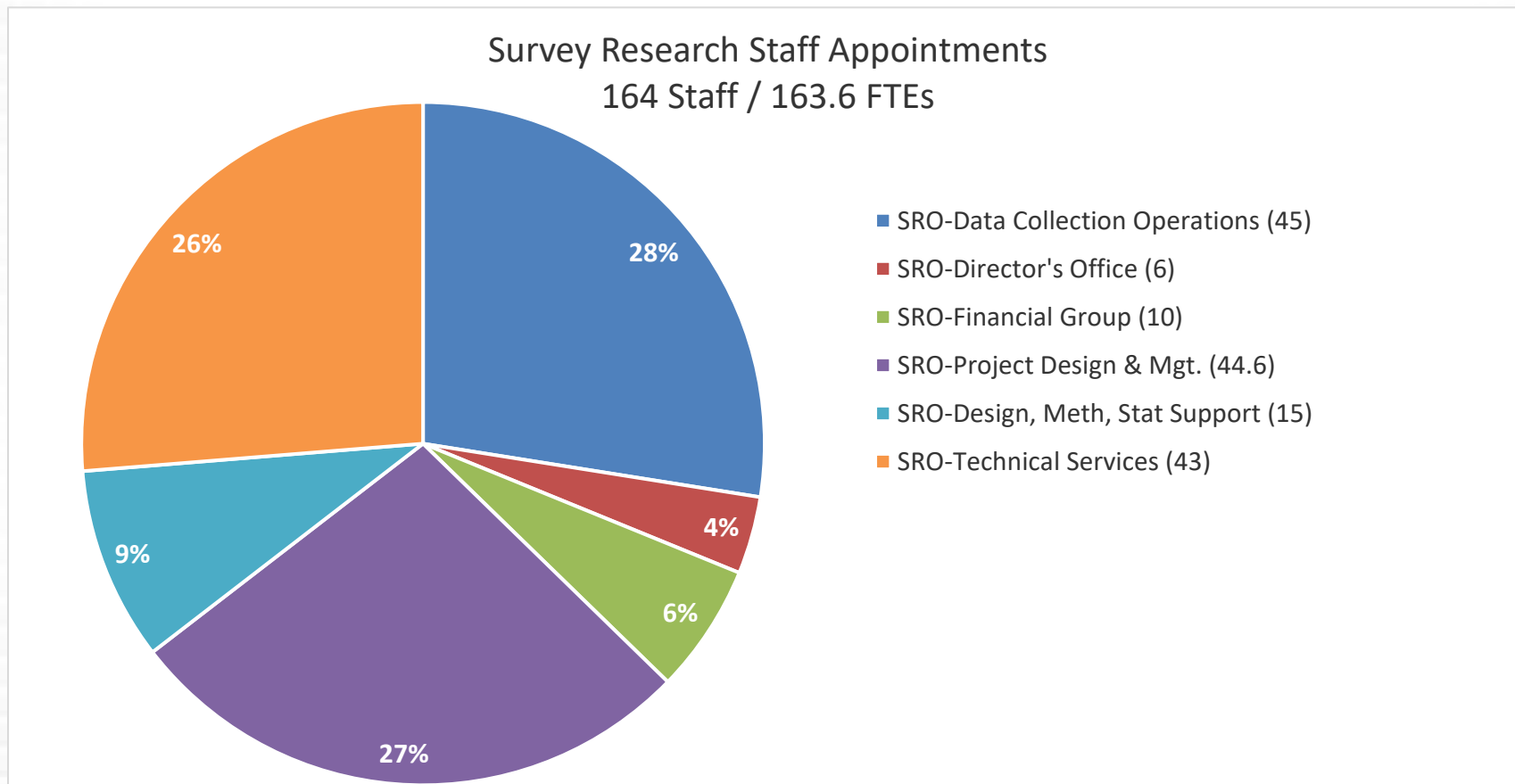




SRO Staff



SRO Staff by Unit – FY2026



Note: Includes projected FY25 hiring efforts.



Interviewer Staff Counts

Current (August 2025) Interviewer Counts

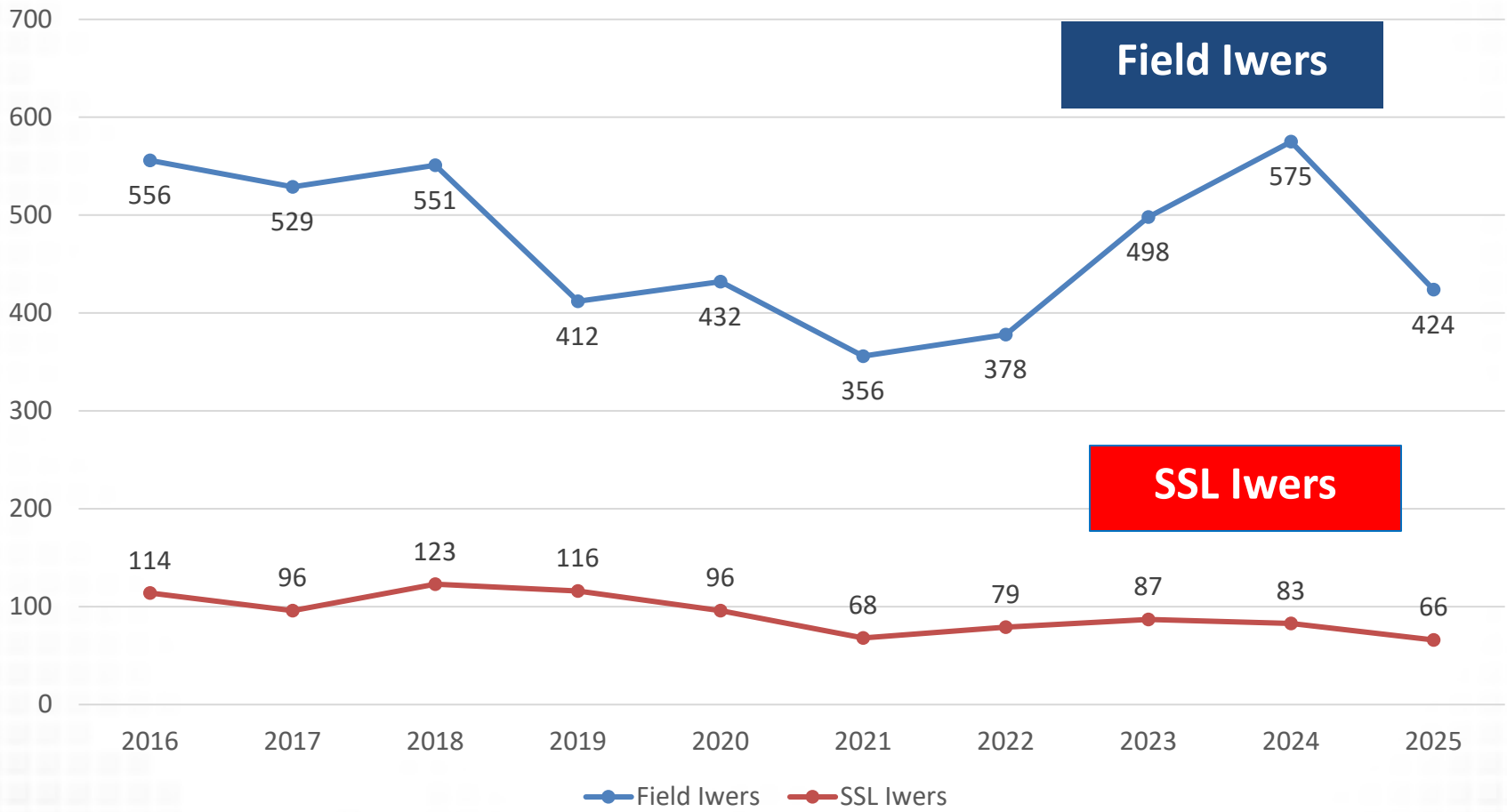
- Field = 424 (575 last year)
- SSL = 66 (83 last year)

New Hires (July 2024 - June 2025)

- Field = 172 (last year 312 were hired)
 - 63.4% attrition rate, average of 90.4 days employed among attritors
- SSL = 3 (last year 59 were hired)

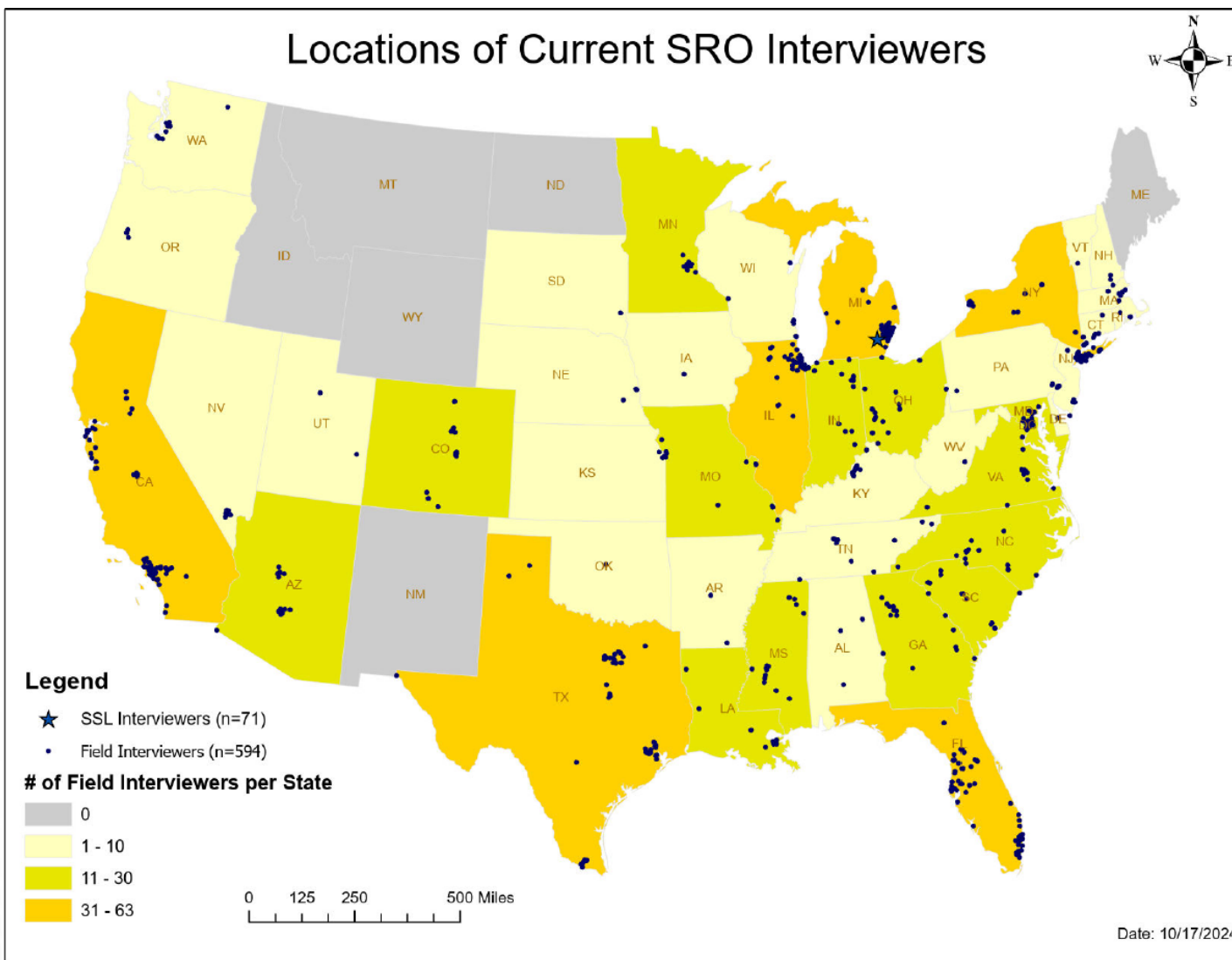


SRO Data Collection Staff - Counts by Year





Map of Interviewers

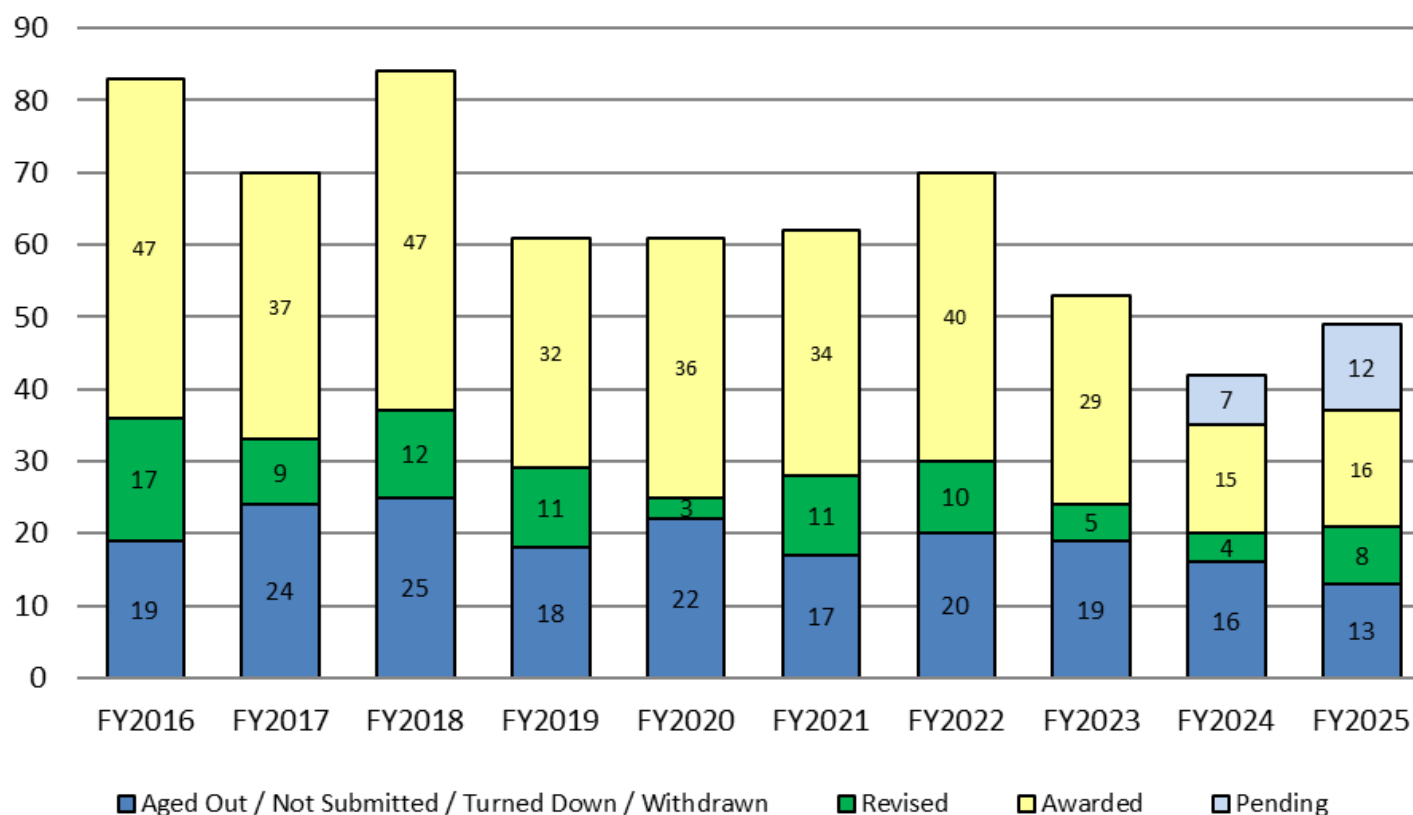




Fiscal Year 2025 Proposals and Consultations

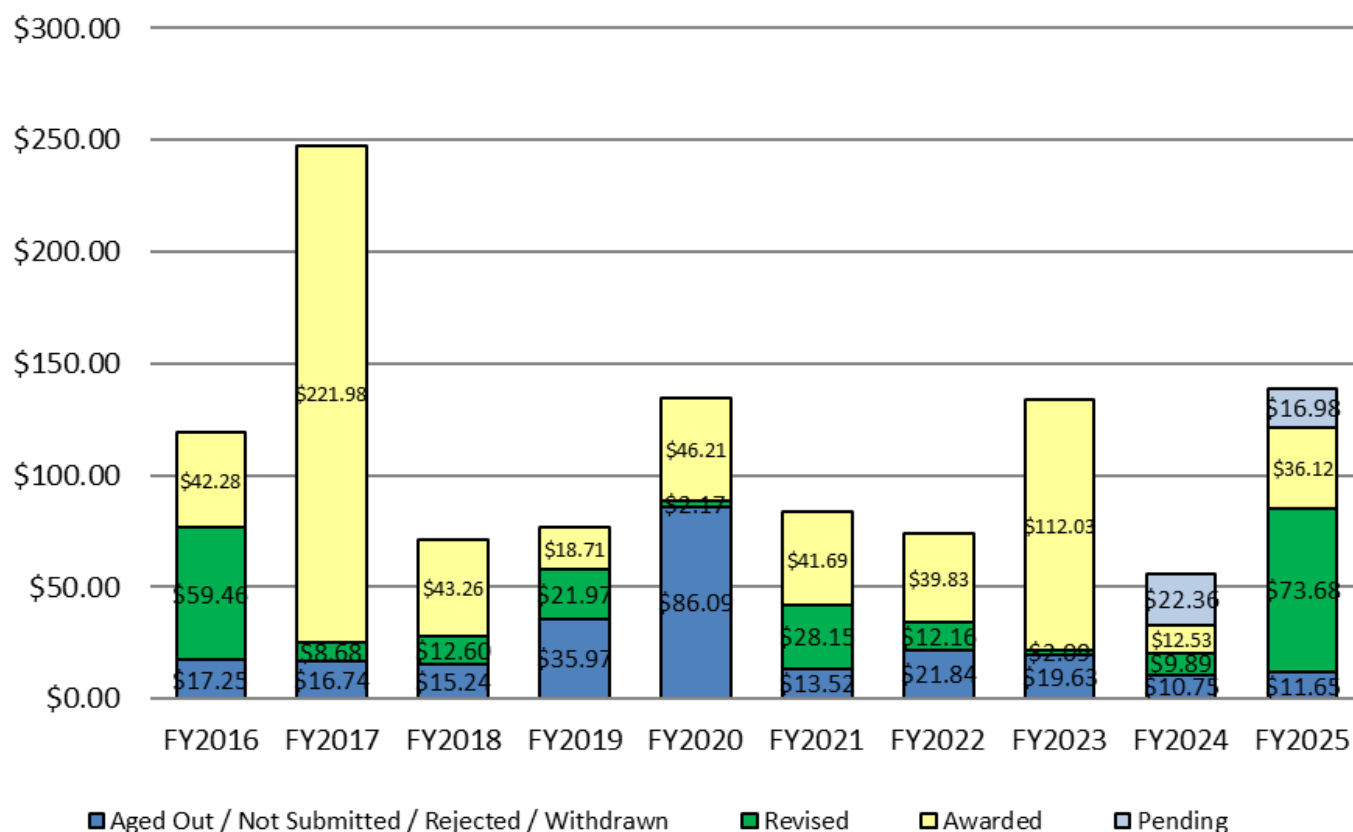


of Formal Proposals by Disposition





Dollar Value (in Millions) of Formal Proposals by Disposition





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



SRO Engagement with the U-M Community

SRO provided assistance on the following initiatives:

- SRC Faculty SSAC Survey
- U-M Faculty Threats and Harassment Survey – design support and qualitative data analysis
- SRO Representation at U-M ResearchPalooza
- Introduction to Questionnaire Design presentations
 - School of Education (CEDER) and School of Dentistry

SRO increased engagement with Michigan Medicine faculty using surveys in the their work:

- 30 questionnaire reviews and survey design consultations
- Sponsored project management, data collection, and analysis:
 - National Dementia Workforce Study
 - Congenital CMV Screening Study (aka “Mama Bears”)
 - Hospitals Sharing Patient Data and Biospecimens with Commercial Entities
 - BASIC-C analysis support, cognitive interview training and analysis
 - HCAP Guatemala - Cognitive Interview Training
 - Hematology Coagulant Use Survey – Coding
 - Management of Antithrombotic Therapy Following Intraparenchymal Hemorrhage in Patients with Primary and Metastatic Brain Cancer



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:

AAPOR – American Association for Public Opinion Research:

Paul Burton, Wen Chang, Stephanie Chardoul, Grace Desjardins, Piotr Dworak, Liliana Grueber, Makenna Harrison, Meredith House, Margaret Hudson, Andrew Hupp, Shonda Kruger Ndiaye, Nicole Kirgis, Eva Leissou, Lisa Lewandowski-Romps, and Raphael Nishimura

- *Evaluating the Feasibility of AI-Driven Translation: A Comparative Analysis of ChatGPT-4 and Human Translators in Survey Research*
- *Towards Understanding Costs in Large-Scale Video Interviews*
- *Preparing Survey Cost Estimates – Strengths and Shortcomings Idea Group*
- *Designing a Web Survey Experience for Adolescents: Lessons Learned from Caregiver and Adolescent Participation in the 2024 Panel Study of Income Dynamics Child Development Supplement Study*
- *Designing Incentive Experiments for the National Dementia Workforce Study: Insights into Engaging Facility Leadership*
- *Staff and How Much Will It Take? Results from a Community Clinician Survey Incentive Experiment*
- *Sample Stratification for Election Studies*
- *How Much Measurement Error in Recalled Vote Can Offset Nonresponse Error Reductions in Weighting? a Simulation Study*
- *Obtaining a Probability Sample of a Birth Cohort Via Prenatal Care Practices Using Birth Certificates As a Sampling Frame*
- *Developing Distressed Respondent Protocols in Survey Research: Considerations from Project Proposal Review through Data Collection*



Conference Contributions (continued)

AASRO, Association of Academic Survey Research Organizations:

Stephanie Chardoul, Nicole Kirgis

CSDI, Comparative Survey Design and Implementation:

Stephanie Chardoul

- *Longitudinal survey design to study the health and wellbeing of children experiencing armed conflict: Ukrainian families across multiple settings*

American Educational Research Association Annual Meeting:

Jeff Albrecht

- *Testing Recruitment Methods for a Longitudinal Web Survey of Community College Students*

IBUC, International Blaise Users Conference and Blaise Corporate License User Board meeting:

Karl Dinkelmann, Shane Empie, Jude Perillo, Kelly Lieske and Stephanie Chardoul

- *Multilingual Survey Development in Blaise: Streamlining Localization*
- *Using Accordion Templates for Expandable Rosters*
- *Optimizing Blaise Servers for High-Concurrency Survey Environments*

IFDTC, International Field Directors and Technologies Conference :

Minako Edgar, Mouna Mana, Taghreid Lovell, and Sara Crane

- Four SRO presentations accepted
- Canceled due to federal funding restrictions



SRO Contributions to Committees

- SRC Vision and Values Working Group
(Grant Benson, Brenda Spaulding)
- Future of Surveys Working Groups
(Jeffrey Albrecht, Grant Benson, Wen Chang, Piotr Dworak, Andrew Hupp, Raphael Nishimura, Beth Ohyrn, Karin Schneider, Debbie Seale)
- SRC Hybrid/Remote Committee
(Shonda Kruger Ndiaye)
- SRC Comm3
(Lisa Holland, Maureen O'Brien, Marsha Skoman)
- ISR Accessibility Working Group
(Helen Johnson)
- Community Guides
(Debbie Seale (through 9/24))
- SRC CMT and d3lab Hiring Committees
(Piotr Dworak, Carol Lively)
- DEI Working Group
(Hueichun Peng)



Fiscal Year 2025 Highlights



Evaluation and Verification Enhancements

- Transitioned STARRS LS Wave 5 from its own QC UI into OLIVE, increasing consistency, efficiency, and reducing evaluation costs.
- Select OLIVE Mods: Added evaluator observations about respondents, providing context for evaluation scores; Added the ability to auto select recent cases for interviewers who haven't had evaluations within a set time period; Added 2 New Error Type Categories (Consent, Roster) and 11 New Sub Categories; Enhanced the Inter Rater Reliability Module; Automated an item-timing report to assist in detecting poor question administration.

Leveraging AI for Quality Assurance

- Amazon Connect (“AmCon”) replaced the existing phone-only system (CISCO VoIP) July 2024
 - A new feature includes a limited predictive AI model
 - We compared manual call scoring with AI scores for respondent contacts and voicemails on multiple dimensions (stating first and last names, mentioning “University of Michigan”, mentioning study name, mentioning token of appreciation, providing toll free number, and identifying resistance)
 - Overall, AI did better for single speakers (voicemail) and clearly pre-specified criteria such as “University of Michigan,” “token of appreciation.”

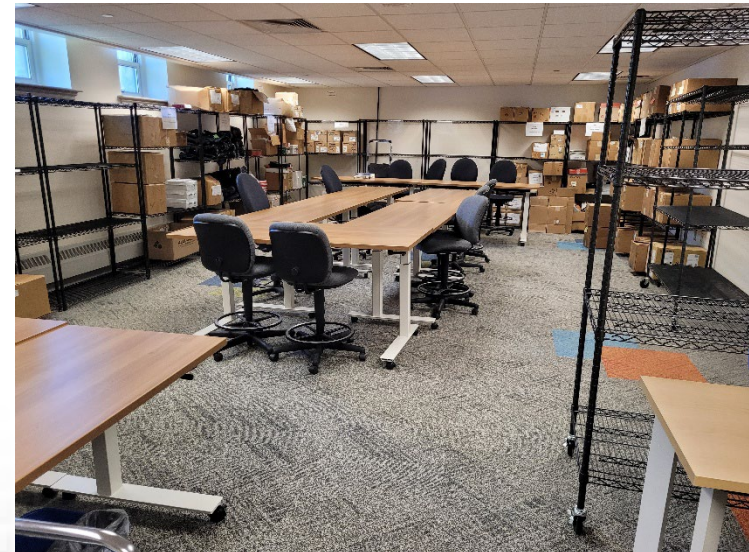
Building a Mail and Assembly Space

- 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

Before



After





2025 Interviewer Satisfaction Survey (ISS)

- Launched our 5th ISS in May 2025 to all active and on-hold data collectors (n=503)
 - 74.9% response rate among active data collectors, 33.3% response rate among on-hold data collectors
- Overall, both job satisfaction (87.9% very or somewhat satisfied) and intent to stay (94.5% very or somewhat likely) continued to be very high



2025 ISS Continued

- New sections included:
 - Efficiency and data quality trade-offs
 - Understanding what job flexibility means and importance of different aspects of job flexibility
 - Organizational identification and whether the organization provides support and engagement
 - Knowledge of CCP resources
 - Data collector title preferences and insights
 - Performance of the QC team
 - Resources and support for Team Leaders



Integrating U-M Maizey into Interviewer Training

- In 2025, the SSL launched U-M Maizey AI within Canvas to enable easy, targeted search of course-specific information
- Maizey integrated with Canvas courses (starting with SSL Essentials & GIT Online Learning) to allow users to ask questions and instantly retrieve relevant answers from course materials, resources, and policies
- Content sources include documents, slides, spreadsheets, and public facing web content linked to the Canvas site



U-M Maizey AI, continued

- Custom AI settings and prompts were used to ensure clear, accurate, and helpful responses tailored to the needs of our data collection team
- Early results show improved access to key information and faster support for the Survey Technicians
- Ongoing user feedback and training are helping refine the integration for broader use in additional courses



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 pre-paid card options.

Rpay: SSN Collection

- SRO played a key role in clarifying and documenting new processes for ISR projects using the Business Office for Rpay:
 - The new U-M procedures on payment tiers
 - The elimination of the “sensitive tier”
 - The collection of SSNs
- SRO took concerns regarding elements of the proposed process to Treasury, IRB, and HSIP leadership and successfully advocated for latitude to modify to meet project needs.

Reassigned Numbers Database (RND)

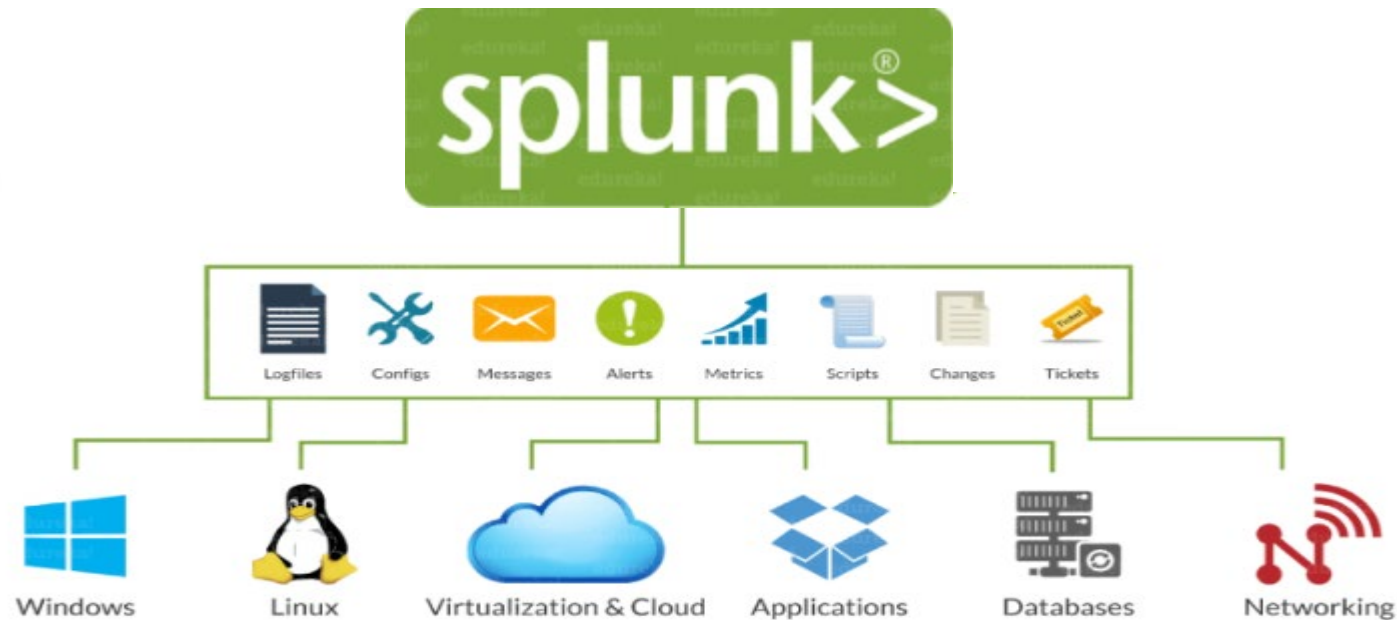
- SRO experimented with querying the FCC's RND to ensure we find no evidence that a number an R has provided us to text has changed ownership since that consent was granted.
- Across projects, we found only an extremely small proportion of numbers had changed ownership or were not found in the DB. These could be immediately reassigned to locating.
- Numbers found not to have changed ownership, can now be texted (via automated mechanism) 1x/wk vs 1x/mo.
- Shifting more text messaging to automated methods saves money while still limiting our risk of TCPA violation.
- Projects now increasingly query the RND to inform batch text messaging frequency and expedite locating.



What is Splunk?

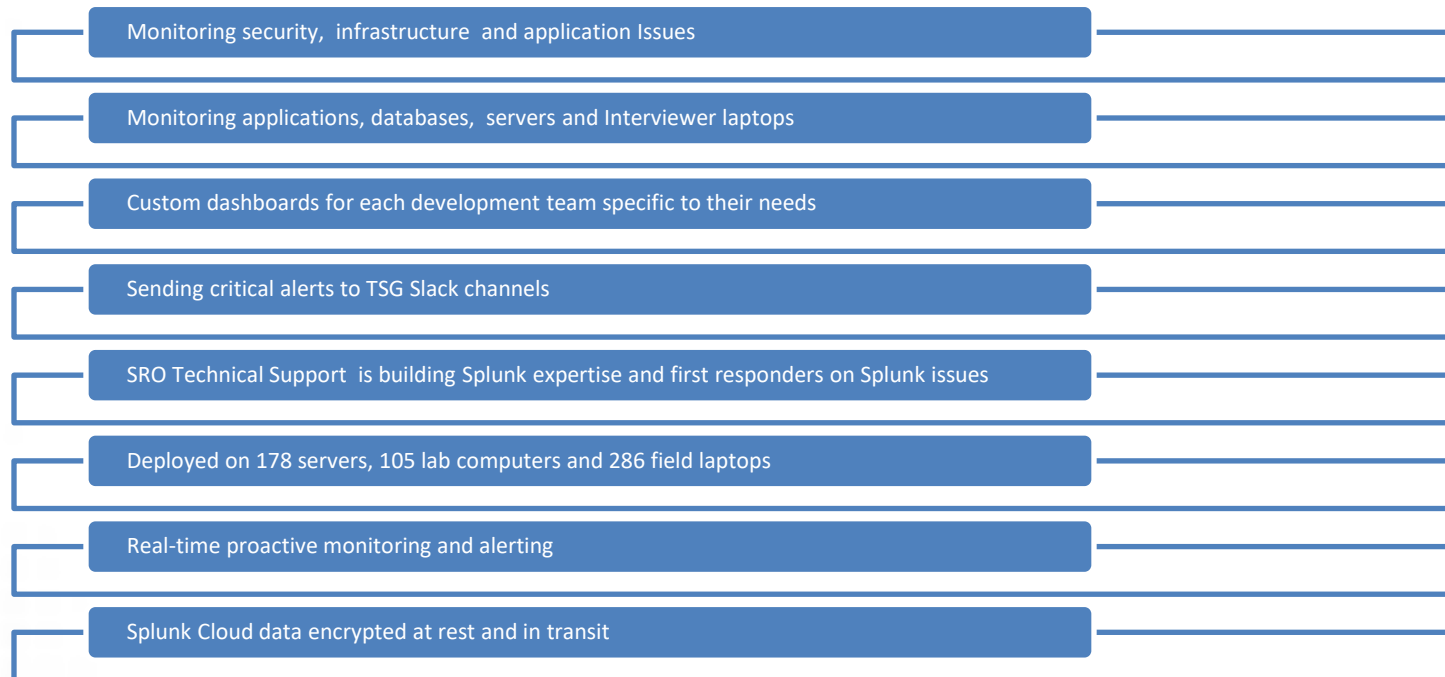
SRO's Technical Services Group (TSG) recently adopted Cisco's Splunk Cloud, an industry-leading platform used for its advanced capabilities in searching, monitoring, and analyzing application and infrastructure log files. Splunk excels in log management, security information and event management, application monitoring, and operational intelligence.

Across the university, Michigan Medicine is already leveraging Splunk Cloud, while ITS currently operates a self-hosted version and is planning a future migration to Splunk Cloud.





SRO Splunk Implementation





Splunk Impact

- SRO Technical Support can now anticipate trends before they impact operations, enabling us to deliver a higher level of service to both SRO staff and our interviewers and respondents.
- SRO is now able to focus monitoring on the exact performance and security risks most relevant to our operations.
- SRO can easily harness Splunk's AI and ML tools to gain deeper insights from additional types of data as our needs evolve.



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.

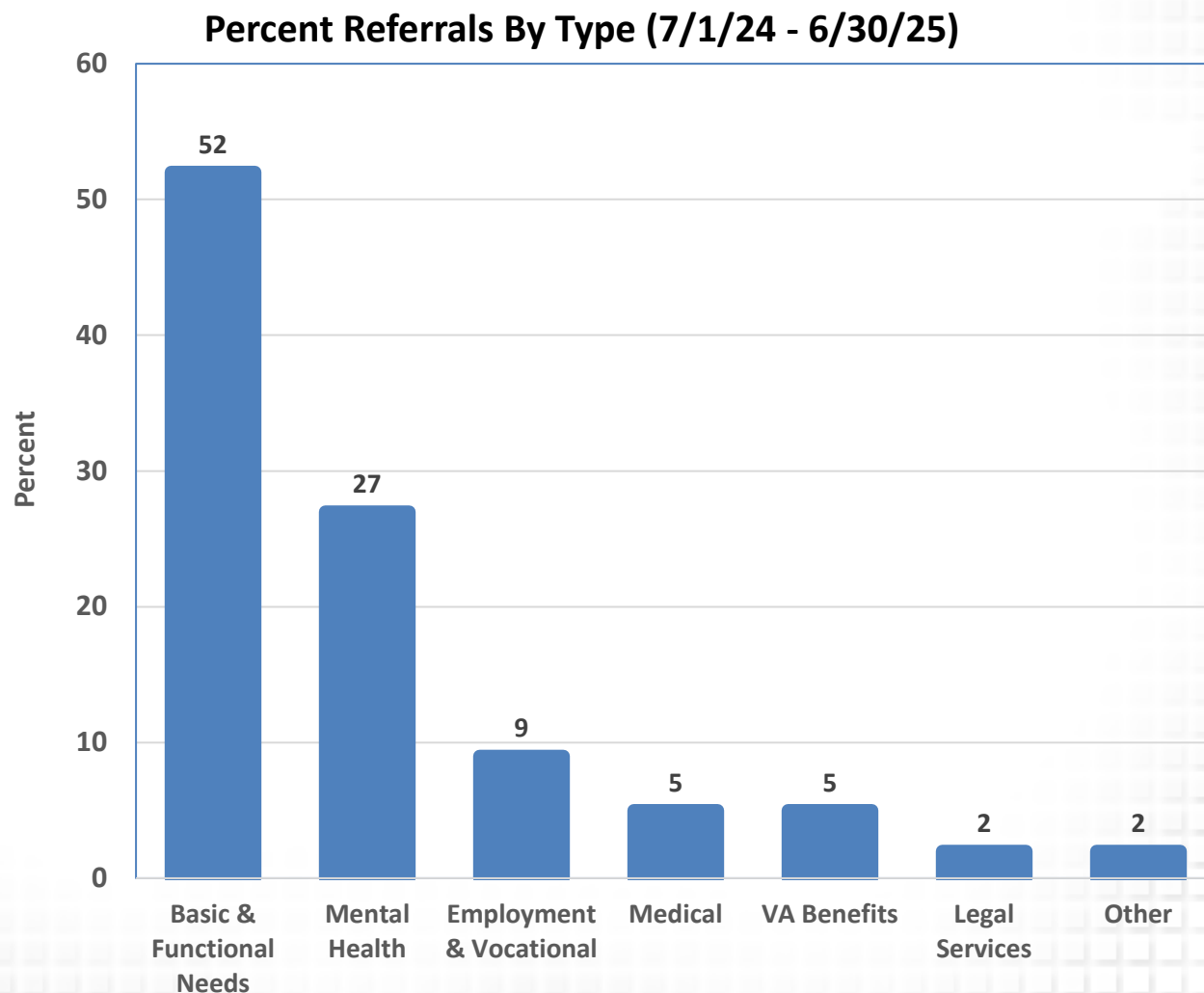
SRO-CCP Referral Counts, by Project (7/1/24 – 6/30/25)

Project Name	Referral Counts
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
Total	613



Clinical Contact Program (CCP)

- The highest proportion of referrals was provided for basic and functional needs, followed by mental health services.
- Referrals for basic and functional needs increased from last year (52% vs. 42%), as did referrals for mental health services (27% vs. 23%).
- Fluctuations in resource referral volume over time reflect multiple factors such as respondent needs, community resources, differential respondent contact rates, and projects in production.

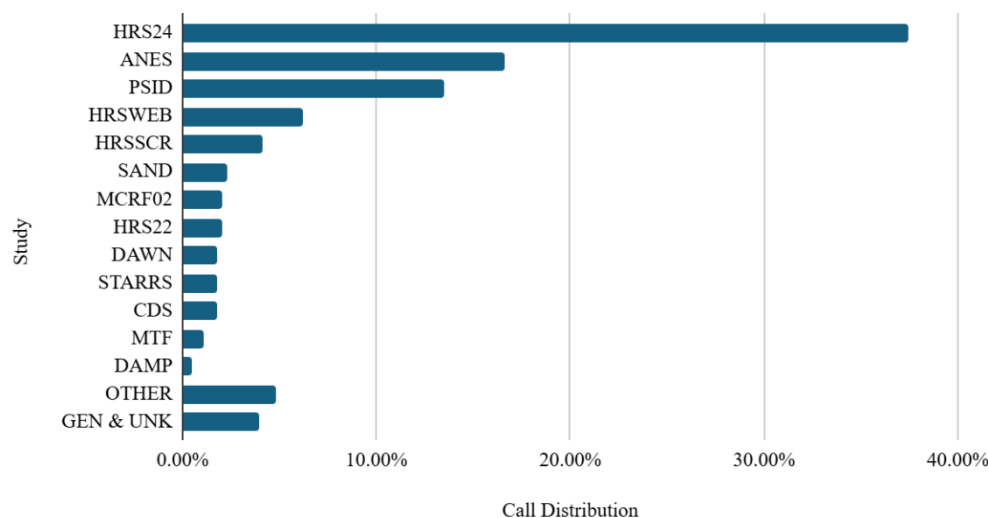




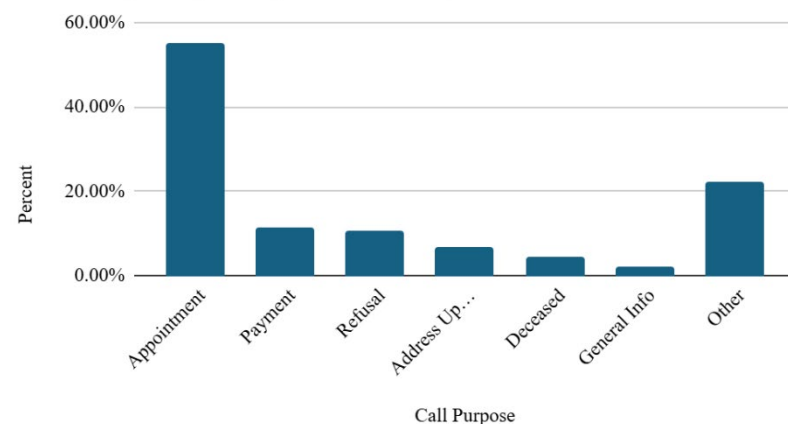
Respondent Connection Team (RCT)

- 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)





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 FY25: Ashanti Harris (Lead), Rebecca Gatward, Nicole Kirgis, Debbie Seale, Jeff Smith, and Deb Wilson



Wellness Initiatives, July 2024 – June 2025

- Some highlights include:
 - Promoted available U-M resources and programs
 - Ann Arbor farmer's market walks
 - Beverage and ice cream walks
 - SRO farmer's market and SRO apple day
 - Coloring wall
 - Lunch at the Union walk
 - 'Get Downtown' commuter challenge
 - Freecycle event



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.



Conclusion

Naturally, this report doesn't capture the full breadth of the *many* projects SRO initiated or brought to completion throughout the year. Our goal is to offer some insight into the dedication and continual momentum that fuels our work across both sponsored endeavors and developmental initiatives.

The contributions of the SRO team stand out as both distinctive and influential. Thank you, once again, for all that you do!



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