Notes from the ICPSR Membership Structure Review Committee Meeting, May 24, 2002

**Present:**Margo Anderson, John Handy, Chuck Humphrey, Paula Lackie, Jim Sweet, Myron Gutmann, Hank Heitowit, Michelle Humphres, and Mary Morris

Current ICPSR Membership and Governance Structure

The bylaws define the current membership categories. None of the ICPSR governing documents provides for a formal review process for the membership categories, nor do the governing documents provide for a formal review of the classification of current members.

It is likely that some members are misclassified due to the fact that some universities have substantially changed their academic offerings and enrollment since they joined ICPSR. Looking at those schools today would result in their placement in a different membership category.

Participation among members in the governance of ICPSR is equal. That is, each member has an equal vote. The question was raised whether this governance structure could survive if 100 more members were to join, or if 200 community colleges were to join. Would members start to vote as blocks and substantially change the ICPSR governing body?

The membership model provides stability for ICPSR and gives ICPSR the authority to speak for the social science community. Currently about one-third of the ICPSR annual budget is from membership dues, the rest from grants and contracts. All membership dues are used for real services. Overhead expenses are paid for out of grants and contracts.

There has been no substantial growth in ICPSR membership because ICSPR doesn't have a marketing plan and hasn't had staff devoted to marketing the Consortium.

Impact of ICPSR Direct on Membership Structure

The bylaws define federations as a number of institutions that have joined around a common link. The common link is responsible for disseminating data and documentation to member schools, thus relieving ICPSR of this burden. With the change of technology, though, re-dissemination of data and documentation has disappeared.

ICPSR Direct, which allows direct access to ICPSR data by staff, students and faculty on member campuses, results in services to federation members today that are identical to those services provided individual members. Federation members pay a discounted fee yet are now getting the same services via ICPSR Direct as individual members paying full rate. This inequity prompted the Council to review the membership structure.

Alternate Classification Schemes

Staff presented detailed information on the Carnegie Classification System, showing how ICPSR member schools would be classified using that system and listing the schools at all Carnegie Classification System levels that are not members of ICPSR.

Using the Carnegie Classification System, about 60 colleges classified as B schools would be rated as A schools, about 4 colleges currently rated as A members would be rated as B members, a few schools currently categorized as Ss would become Bs and a few schools currently in the B category would be rated as S schools. This again points to the fact that ICSPR has not had any systematic review of member schools and their classification category. At issue is how ICPSR would go about telling a member that they are now in a different category and consequently that their fee has increased substantially?

Another observation from the materials presented is that only 102 of the 606 schools identified in the Carnegie system as Doctoral-Research Universities- Intensive and Masters Colleges and Universities I are members of ICPSR. This led to discussions about the marketing of ICPSR.

There is no national classification system based on the social sciences; the Carnegie system is based on the entire university academic program. The advantages of the Carnegie system are that it is an external system (someone other than ICPSR is placing the university in a category) and it is a fairly straightforward system with nine categories. (Changes, though, are in the works for a revised system in 2005.)

The current membership category system overlaps fairly well with the Carnegie system. As noted, there are around 80 schools that would be classified differently. One suggestion was to keep the current system while at the same time reviewing universities for correct placement in the current categories. If this doesn't resolve the discrepancies, then consider tweaking the current system by dividing the B category into two categories.

The idea of classifying members based on university enrollment was raised. Issues of full time vs. part-time students and how to deal with branch campuses would have to be resolved though.

There is a fair amount of heterogeneity among the A schools. Maybe a Super A category should be developed for major research universities. These Super A schools would pay substantially more, with the idea that they are contributing to the social science infrastructure by supporting ICPSR more heavily than other members. Super A schools could be identified or defined by the amount of social science grants they receive.

Another idea is a two-tiered organization: members and subscribers. The subscribers would only get certain data or a certain amount of data and would have no voting rights. The idea of ICPSR spinning off a 'for-profit' subsidiary followed, with the statement that this type of model would require a business plan and considerable research.

Maybe ICPSR should target specific memberships to the needs of particular schools. If a school is just interested in instructional materials, then they could subscribe for those materials only.

Another option is a fee for service model. All members would get a basic set of services and then charged a fee for anything over and above that basic service.

Staff was asked to reclassify the current members using the current classification scheme and determine membership fees. They were also asked to calculate membership fees based on the Carnegie Classification system. Finally, staff was asked to identify the Super A schools and calculate membership fees with that category in place.

Federations History and Current Configuration

As noted, federations are defined in the bylaws as a number of institutions that have joined together around a common link. That common link is responsible for distributing data and documentation from ICPSR to the other federation members. Federation member fees were discounted, taking into account the distribution work that the federation hub assumed.

Federations were created in the 1970s when ICPSR was focused on increasing membership. The promotion of social sciences research was, and continues to be, a main goal and bringing as many colleges and universities as possible into the membership were a means of achieving that goal.

The common link of distributing data and documentation no longer exists due to ICPSR Direct.

Eliminating federations, and the current discounts they receive, will be problematic for some of the small schools in federations. Some schools would no doubt drop their membership.

One solution offered was to reduce the S membership fee to the $2,000 range. That might be more affordable for some of the smaller schools currently in federations.

The idea of keeping federations or some association of schools was raised, with the proviso that they exhibit certain characteristics, i.e., that they are not just banding together to get reduced rates, and that the current discount rate be reduced substantially. Looking at the current federations, some offer training and value added services to their members, and others bring together non-research universities and provide instructional materials to their members. Other federations were formed for the sole purpose of bringing in new members. Defining federations as groups that provide training to their members, pay the dues in a single check, bring in universities not currently members of ICPSR, etc. could provide for the continuation of the federation-like category.

Current federations could be grandfathered in, but with a reduction in the discount rate. A maximum 20% discount was mentioned. The increase in fees could be phased in over a few years so as to lessen the impact. Other discount figures were mentioned and staff will examine the impact of various figures.

The notion of stewardship with respect to federations was raised, as was the comment that individual members have been subsidizing federations.

Marketing ICPSR Membership

Marketing issues arose when the Carnegie Classification System data showed that for two categories totaling 606 universities, only 102 were members of ICPSR. Many ideas were suggested including marketing ICPSR as an investment, not as a data service, and targeting membership to the appropriate administrator at the university. The idea of promoting membership as being part of the social science infrastructure rather than getting data was discussed. Membership staff indicated that when a university drops the bottom line is generally dollars and the fact that data use did not justify the membership expenditure.

Another marketing approach is to stress data development, not data distribution. Data development includes such things as the leadership role of ICPSR in the DDI, the preparation of instructional materials, bringing developing countries into the membership and training their graduate students and faculty in the summer program, on-line analysis, etc. This relates to the role of ICPSR in the larger community; we serve the large social science community and should measure our services in the number of researchers trained, the number of topical archives we host, etc., not in the number of megabytes downloaded.

ICPSR serves as an advocate for the ideal of sharing data. That is important to the research community. A brief discussion followed regarding ICPSR's leadership role in the community, what organizations it belongs to and what organizations it should belong to. This was straying from the issues on hand but the committee decided it should to be addressed in the future.

The proposal that we target specific services to specific universities was raised again. Maybe we need to think of a member category and a subscription category, depending on the specific needs of the school.

Other ideas to consider in marketing ICPSR included where ICPSR should be placed in the university (department, library), who we should target when doing marketing work (faculty, administrators), and the realization that universities have different models and what works at one college might not work at another.