

October 2023 Council  
Meeting Minutes

***Attendees:***

**Council Members (In-Person):** David Armstrong (Chair), Bobray Bordelon, Jon Cawthorne, James Doiron, Kristin Eschenfelder, Susan Frazier-Kouassi, Mark Hansen, and Gisela Sin

**Council Members (Remote):** Randall Akee, Michael Cafarella, Trevon Logan, Ken Smith, and Katherine Wallman

Special Guest: Courtney Bell

**ICPSR Staff (In-Person):** Trent Alexander, JD Alford, Ambyr Amen-Ra, Sandeep Bedadala, Jon Brode, Megan Chenoweth, Rebekah Chu, Alina Conn, Lara Cooper, Elyssa Daniel, Linda Detterman, Kelly Doonan-Reed, Aalap Doshi, Allyson Flaster, Robert Franzese, Robert Gessner, Jeannette Jackson, Joy Jang, Jeff Jones, Euijin Jung, John Kubale, Kathryn Lavender, John Lemmer, Maggie Levenstein, Jenny Li, Jared Lyle, John Marcotte, Trisha Kunst Martinez, A.J. Million, Elizabeth Moss, Michelle Overholser, Holly Neilson, Amy Pienta, Darleen Poisson, Bing She, Elizabeth Shook, Fillippo Stargell, Sandra Tang, David Thomas, Rujuta Umarji, and Candice Wilson

**ICPSR Staff Remote:** Anna Beaubien, Zachary Bennett, David Bleckley, Stephanie Carpenter, Evan Cosby, Dale Couey, Dominic DiFranco, Amanda Draft, Julie Eady, Greg Farris, Wendi Fornoff, Chelsea Goforth, Nishit Gopani, Bill Horvath, Hassan Hodges, Samuel Imbody, Meghan Jacobs, Matthew Johnston, Kevin Kapalla, Piotr Krzystek, Susan Leonard, Scott Lienen, Bianca Monzon, Erin Meyer, James W McNally, Nehemiah Naidu, Amy Pienta, Katey Pillars, Dan Pritts, Shannon Reidy, Kyrani Reneau, Sarah Rush, Michael Shallcross, Alison Sweet, Sharvetta Sylvester, Wendy Umbriac, Melissa Wlodkowski, Jennifer Zeiger, Sandy Zalmout, and LingLing Zhang

**Approval of Minutes**

Dave Armstrong, Chair, ICPSR Council, began with a welcome to attendees, with some participating in person and others online. The first order of business was to approve the minutes from the last meeting. Dave motioned to have the minutes approved. Minutes were approved unanimously.

**Director's Report**

Margaret Levenstein presented the Director's Report and expressed gratitude to those who had come into town for the meeting. She mentioned various training activities and upcoming

festivities. Levenstein highlighted the importance of the biennial meeting, emphasizing its value in understanding the perspectives of different stakeholders.

The Director's Report discussed the growth of ICPSR in terms of people and finances and how ICPSR and its employees have adapted to the pandemic. The key message was that ICPSR is transitioning into a more stable phase, where employment growth has slowed and people having ongoing hybrid work arrangements. The organization is now primarily focused on hiring to replace turnover rather than rapid expansion, marking a shift from previous years of transformative growth. Levenstein discussed both new and ongoing initiatives within the organization, acknowledging the collaborative effort that led to financial stability and responsible budget management.

Levenstein discussed the ICPSR Summer Program. She described the SP's upheaval during the pandemic, with two years of fully remote instruction followed by two years of hybrid programming. The SP is expected to be hybrid in Summer 2024. Levenstein highlighted efforts to reinvent the Program, combining lessons learned during the pandemic with the importance of in-person experiences. They made significant changes, including transitioning from two four-week sessions to two three-week sessions with a one-week intersession in between and offering on-campus housing for participants and instructors.

Approximately 40% of the general Program was held in person, creating a vibrant in-person experience while still offering the advantages of remote options. The Program awarded almost 130 scholarships, including 45 diversity scholarships, as well as scholarships targeting recipients from Africa, MENA, and Ukraine. Levenstein acknowledged that the Program incurred financial losses, but said that these losses, in part due to our subsidy of on-campus housing, were necessary to revive the in-person component of the program and to support inclusivity and diversity.

Levenstein noted ICPSR's ambitious goals and the infrastructure in place to achieve them, emphasizing a forward-looking approach. In her presentation, Margaret Levenstein discussed the organization's recent developments. Growth has slowed, with ICPSR currently employing around 164 people, compared to 98 people five years ago. Levenstein emphasized the concept of stability, where they anticipate maintaining a headcount of approximately 160-170 employees in the coming year. The organization has embraced a hybrid workplace, with most staff spending two or three days in the office each week, while others remain fully remote. Levenstein highlighted the flexibility offered to employees in terms of work schedules and commuting. Levenstein and most of the leadership team are in the office full time.

She touched on the challenges of managing a hybrid workforce but noted that they have found effective ways to ensure integration within the organization. Levenstein emphasized that while they are not actively expanding, they continue to seek specific positions such as project managers and an IT security expert.

The core of ICPSR's work involves making data resources available, receiving data contributions from the community, curating data, and sharing data. ICPSR's data holdings have reached over 18,000 studies (about 11,000 curated studies and 7000 self-published deposits). About ten

percent of ICPSR's curated studies include restricted data. Self-published data is growing rapidly, including a recent addition of about 300 deposits from the American Economic Association.

Levenstein acknowledged the efforts of their Bibliography Team in identifying publications that use their data, reaching a total of 110,000 publications. The organization now manages over 6.25 million variables, and they saw almost a million dataset downloads from ICPSR in the last year. There are 34,000 active MyData accounts and ICPSR received more than 640,000 website visits. Levenstein highlighted that this work continues to grow, and ICPSR regularly releases new curated data sets, contributing valuable resources to the research community.

ICPSR has experienced an increase in sponsored funding, a trend highlighted in a graph presented during the discussion. The graph displays the number of awards and their corresponding values over the past few years. While the number of awards has seen a slight decrease recently, the total funding has risen significantly. The increase in funding has had a direct impact on the organization's budget, as it supports various aspects of its work. These funds are allocated in two primary ways. First, they directly finance people who are responsible for supporting users in various research areas, such as aging, demography, health, drug abuse, education, and criminal justice. These people curate data, assist users in accessing data, and play a crucial role in making ICPSR data resources available. Second, the funding contributes indirectly to the organization's operations, ensuring that ICPSR's technology platforms remain secure, robust, and user-friendly. Maintaining a well-functioning and secure system is a vital part of ICPSR's mission, even though it may not be explicitly requested by sponsors. This funding is crucial for the organization to continue serving its mission effectively and efficiently, ensuring the smooth operation of the platform and the resources ICPSR provides to users.

Around a year ago, the Council recommended conducting a staff engagement survey to address concerns related to the organization's growth and the shift to remote work. The survey aimed to understand how these changes affected the staff's experience at ICPSR. While it took some time to initiate, the survey was eventually conducted in late April and early May, receiving 82 responses, which includes about half of ICPSR's employees.

The survey requested both quantitative and qualitative responses, with respondents sharing open-ended comments alongside numerical responses. While the results didn't necessarily contain shocking insights, they shed light on the organization's strengths and challenges as perceived by its staff. Overall, the survey indicated that ICPSR staff feel supported by their supervisors and peers. They expressed pride in working at ICPSR, recognized the importance of the organization's mission, and appreciated ICPSR's initiatives for growth and adaptation. The staff also emphasized the value of supportive colleagues and the organization's efforts in encouraging work-life balance, fostering a relaxed work culture, and maintaining a strong commitment to innovation and technological advancement.

The survey also highlighted certain areas of concern. Staff members expressed uncertainty about ICPSR's primary identity, whether it is predominantly a tech company or a data content and training provider. This issue stems from the evolving implementation of ICPSR's mission, which

now relies on updated technology and different platforms, while the core mission remains unchanged. Additionally, cross-unit and team collaboration seemed to be less rewarding for staff members. As the organization grew, many staff members found it challenging to connect with colleagues from different teams, leading to a desire for more intentional efforts to build a sense of community across units.

Lastly, staff members reported frustrations related to changing processes and the perception of insufficient attention to non-RDE activities. While RDE receives considerable focus, this emphasis sometimes created challenges for the organization. There was a need for better communication, collaboration, and integration of RDE with the broader organizational goals. The organization has been actively working to address these concerns, promote a sense of community, and ensure that the staff feels supported and engaged in fulfilling ICPSR's mission effectively.

Even apart from RDE, ICPSR is thriving as reflected in the growing ICPSR bibliography, data holdings, datasets downloads, and ICPSR over 34,000+ active MyData accounts. ICPSR's involvement includes projects like the Social, Behavioral, and Economic COVID Coordinating Center (SBECC). This initiative, led by John Kubale and Megan Chenoweth, involves 15 numerous research teams across the United States. It's funded by various units within the National Institutes of Health and focuses on supporting social, behavioral, and economic research on COVID-19. The Coordinating Center helps create common data elements and best practices for measuring the pandemic's impact, aiming to provide consistent, transparent, and reproducible measures for researchers nationwide.

NACDA, ICPSR's aging archive, has been operating for 40 years. Funded by the National Institute of Aging, NACDA has consistently grown its data holdings year by year. NACDA is pioneering in its use of DDI Lifecycle, a metadata standard that enhances the comparison of longitudinal studies and studies conducted across different times and locations. NACDA uses a Colectica portal in collaboration with the Colectica organization, which enables researchers to access data marked up in DDI Lifecycle, further enhancing the utility of aging-related data.

ICPSR continually embraces new technologies, approaches, and metadata standards to improve its support for the research community. These initiatives demonstrate the organization's commitment to advancing research and making data more accessible and valuable to researchers.

Amy Pienta has been leading ICPSR's efforts to support researchers in responding to NIH's 2023 data sharing policy. Pienta and her team have been instrumental in assisting the broader research community in understanding and complying with NIH's new data sharing requirements. This guidance includes helping researchers write data management plans that align with the policy, and in so doing fosters open, reproducible, and transparent science. ICPSR's active leadership in facilitating data sharing and advancing research is evident through its proactive engagement with the evolving NIH data sharing landscape.

The University of Michigan faced a peculiar situation when it severed its connection to the Internet right at the start of the Fall 2023 semester. ICPSR responded to this challenging event admirably, with team members collaborating, offering support to one another, and quickly



addressing the unexpected issues. Despite the University's Internet connection being restored after three days, several ICPSR services took longer to recover. For instance, the virtual data enclave and the SDE, crucial for curation activities, were down for over two weeks. The staff, led by Rujuta Umajri, displayed impressive teamwork and adaptability during this time, tackling deferred tasks, planning professional development activities, and providing assistance to other teams, thereby fostering cross-unit collaboration. The incident underscored the staff's resilience and ability to work effectively even in challenging circumstances.

The University of Michigan faced an unexpected challenge when it severed its connection to the Internet. In response to this situation, ICPSR demonstrated resilience and adaptability. Joe Saul, the Chief Privacy Officer, played a crucial role in implementing ICPSR's Business Continuity and Disaster Recovery Plan. This plan was instrumental in helping ICPSR prepare for unforeseen events. The BC/DR team, including Joseph Saul, Linda Detterman, and the entire DevOps team, worked diligently to ensure that ICPSR's operations and data remained secure. They conducted daily meetings to keep everyone informed about the situation and made the decision to temporarily disconnect ICPSR's servers from the university's network to safeguard against any potential risks. Alina Conn, Robert Gessner, and Jeff Jones played integral roles in monitoring the situation, providing updates, and ensuring effective communication. While the precise reason for the university's decision to disconnect from the Internet remains unknown, ICPSR's proactive approach and well-executed plan proved essential during this unexpected crisis.

The unexpected Internet outage at the University of Michigan highlighted several valuable lessons. Firstly, it underscored the importance of preparation and having a robust Business Continuity and Disaster Recovery Plan in place. The crisis demonstrated the resilience and collaboration of ICPSR's staff who worked together to navigate the situation. Their sense of humor and supportive attitude contributed to managing the crisis effectively.

The outage also revealed the presence of technical debt within the organization, which needs to be addressed. Some of this technical debt stems from software that was innovative and exciting when it was introduced, but now requires updates. This emphasizes the need for ongoing software maintenance and keeping up with technological advancements.

ICPSR is prioritizing addressing technical debt to ensure that disruptions to its activities are minimized and that the organization's operations remain secure. Additionally, the organization is preparing to implement new technology, such as the Researcher Passport and other systems, to enhance user experience and data quality in the coming year.

ICPSR recognizes that technology is only one part of the equation, and it is crucial to balance technological advancements with other considerations. While investing in technology is important, it is equally essential to be intentional and strategic about it. The organization is focusing on building tools that are adaptable to both existing and future data. This means enhancing metadata and adjusting workflows to ensure that new tools can effectively work with the evolving data landscape.

ICPSR has taken several steps to achieve this. We have reorganized our Product unit into the Product and User Experience unit, bringing together product owners, engineers, and designers to

work collaboratively. Aalap Doshi is leading this team, fostering a more holistic approach to product development. Furthermore, ICPSR is actively seeking external expertise, engaging computer scientists, graduate students, and faculty from the University of Michigan to provide diverse perspectives on their projects. The organization is also rationalizing metadata to ensure standardization and effective implementation of new tools.

We are addressing the challenges posed by idiosyncratic terms under which restricted data is made available. Currently, data access methods are hardcoded into the software, making it difficult to adapt to evolving needs. ICPSR is working on modularizing these data access methods, ensuring they are not hardcoded, and that researchers can utilize virtual enclaves, physical enclaves, or other secure places as needed. To achieve this, they are also focusing on rationalizing metadata, as software cannot effectively work with non-existent metadata. Furthermore, ICPSR is actively working on streamlining the data ingestion and dissemination process. ICPSR aims to simplify the messaging to researchers regarding data deposit, curation, and data quality. This streamlining is expected to lead to a more sustainable model for self-published data, moving away from the current model, which is not sustainable. To achieve this, ICPSR is reevaluating the business model and the technology model in tandem, ensuring that both evolve gradually and consistently.

ICPSR is undergoing a reorganization of its General Archive and acquisitions staff into the Consortium Archive Team, aimed at ensuring that sufficient and coordinated resources are allocated to recruiting, acquiring data, determining curation, and facilitating data dissemination. The changes in this reorganization are expected to be announced shortly, with the goal of optimizing core activities related to obtaining, preserving, and disseminating social and behavioral science data in a sustainable and consistent manner.

The announcement of new Council members, including Courtney Bell who is here with us today, and forthcoming award ceremonies were also discussed. The Piper Simmons award for social behavioral research data contributions will be presented to the Survey of Consumers, while the Warren Miller Award for meritorious service in the social sciences will be given to Katherine Abraham, a distinguished university professor at the University of Maryland. The Flanagan award for distinguished service to ICPSR will be presented to James Jacobs. These honors will be celebrated at the upcoming banquet, which attendees are encouraged to join. The ICPSR director then invited questions from the audience.

During the discussion, Trisha Martinez emphasized ICPSR's strong commitment to protecting its data, especially during the Internet outage. She noted that even though there was pressure to bring the system back up faster, the organization maintained its dedication to security.

**Action Items/Next Steps:** None at this time  
**Director's Report Slides**

Following the discussion, David Armstrong mentioned that the meeting order was adjusted to have the Budget and Finance report first due to the need for a longer discussion and a vote that

was delayed. He then turned the floor over to Jon Cawthorne to present the budget and finance report.

### **Budget and Finance Committee Report**

Jon Cawthorne conducted a review of the budget material in the Council Book. In terms of Fund Balance and Reserves, ICPSR closed FY2023 with a total fund balance of \$9,759,706. After allocating restricted funds and meeting the minimum unrestricted funds per ICPSR policy, there is an excess unrestricted reserve of \$3,453,724, reflecting a \$761K increase from FY2022. This growth is attributed to a \$194K surplus in the Operating Budget and Year-End Report, along with reduced future Provost Tax expenses.

The Operating Year-End Summary for FY2023 shows a notable improvement, ending with an operating surplus of \$193,884, surpassing the council-approved deficit of \$258K. Operating Revenue totaled \$14,844,408, slightly below budget by \$90K (0.6%). Key revenue variations include increases in sponsored project activity by \$35K, Membership exceeding budget by \$104,515, Summer Program falling short by \$198,986, UM/ISR Funding surpassing by \$63,840, other non-sponsored income exceeding by \$82,514, and VDE General Income exceeding by \$3,262.

Operating Expenses for the year amounted to \$14,650,523, coming in \$361,477 (2.4%) below budget. Key variances include a \$698,231 reduction in salary and benefits expenses, driven by increased spending in the RDE project (so charged to sponsored projects rather than operating expenses) and staff adjustments in the Curation unit. Non-salary expenses exceeded budget by \$53,600 (2.2%) due to the return of travel and conference attendance to pre-COVID levels. ICPSR overhead expenses were \$234,655 above budget (10.9%), primarily attributed to an increase in the ISR Operation and Central Services line, influenced by ICPSR's larger financial size relative to other centers and adjustments in ISR Director's Office commitments. Some of these commitments will be credited back to the centers in FY2024.

VOTE: The ICPSR Operating Budget Fiscal Year 2024 Budget was approved unanimously.

Action Items/Next Steps:     None at this time

**Budget and Finance Committee Slides**

### **Presentation of Gifts**

During the meeting, several outgoing Council members were presented with gifts, and Bing She, CNS Chief Architect, received the Innovator of the Year Award.

### **Membership, Acquisitions, and User Support**

Katherine Wallman presented the report for Membership and Communications and discussed several important updates and initiatives. First, she mentioned the Consortium Archives Team (CAT) launch and its focus on improving the organization of membership-only data. She highlighted the recent rollout of CAT and indicated that it is still in its early stages. Next, she discussed user support updates, noting the migration of ticketing to the cloud to improve support services and how it played a crucial role during the recent Internet outage at the University of Michigan. Additionally, she mentioned the ongoing efforts to update the ICPSR homepage to make it more user-friendly and enhance the visitor experience. The content updates are planned for 2024, with a full launch expected in 2025.

Wallman provided an update on the membership numbers, with ICPSR now having 825 members. She highlighted the significant growth in membership, surpassing the previous goal of reaching 800 members, and noted that there would be a focused outreach to institutions, including historically Black colleges and universities (HBCUs), to address concerns about their loss and regain their participation.

These updates all reflect ICPSR's ongoing efforts to enhance its services, expand its membership, and provide better support to users.

During the meeting, several topics were discussed, including the upcoming biennial meeting. The meeting will primarily focus on ICPSR's tools and services, addressing the needs and requests of participants. The meeting will not have a hybrid format, but much of the content will be turned into webinars for later access. The question of whether attendees were new or returning was raised, and it was revealed that about half of the 66 ORs attending were new, while the other half were returning, consistent with previous experiences.

One notable change discussed was the transformation of the paper competition for younger students into a scholarship activity. Students will now provide video presentations using modern technology, with an emphasis on using accessible devices like iPhones.

The presentation concluded with an open forum for questions and discussions among the participants. The focus was on the ORs and the Biennial meeting.

Action Items:               None at this time

**No Slides**

### **Summer Program Committee Report**

Dave Armstrong outlined two three-week General Sessions with a one-week Intercession, offering a total of 44 courses and lectures. Participants appreciated the variety of options but found the days to be excessively long. Housing was available through the University of Michigan, and while attendance was good, it fell short of initial projections. Adjustments for 2024 include exploring ways to shorten the day, possibly moving math/computing courses online or in a hybrid format. The goal is to optimize pricing, delivery format, and incentives for in-

person attendance, with a focus on returning to pre-pandemic registration levels. Challenges for 2024 are acknowledged, but the Program is evolving toward a viable model.

Action Items/Next Steps:     None at this time

**Summer Program Committee Slides**

### **Technology and Standards Committee Report**

Kristin Eschenfelder discussed the reports from three Units: Computing and Network Services (CNS), Curation, and Metadata and Preservation.

Challenges in recruiting persist but are being addressed, especially for international staff. The introduction of the Product and User Experience Unit involved restructuring from CNS to create a more sizable unit with three areas directed by Product Management, Design, and UX Engineering, with a change in leadership.

Curation experienced a notable reduction in turnover, attributed to addressing morale survey issues and the involvement of experienced staff. The focus is on implementing changes to curation levels and maintaining climate goals.

The Metadata & Preservation section highlighted achievements in completing projects, publishing policies, and ongoing efforts to ensure compliance and improve metadata exports.

CNS reviewed a cybersecurity incident, emphasizing the effective implementation of disaster planning, and outlined challenges with salaries and turnover. Various products under development were discussed, including authorization and authentication, study overview pages update, Turbo Creator, Basic file operations analysis and redesign, and Researchdata.gov improvements.

Action Items/Next Steps:     None at this time

**Technology and Standards Committee Slides**



*Biennial Meeting 2023*  
**NextGen ICPSR**  
*October 4-6, 2023*

# Council Meeting

October 4, 2023



*Maggie Levenstein*  
*Director, ICPSR*

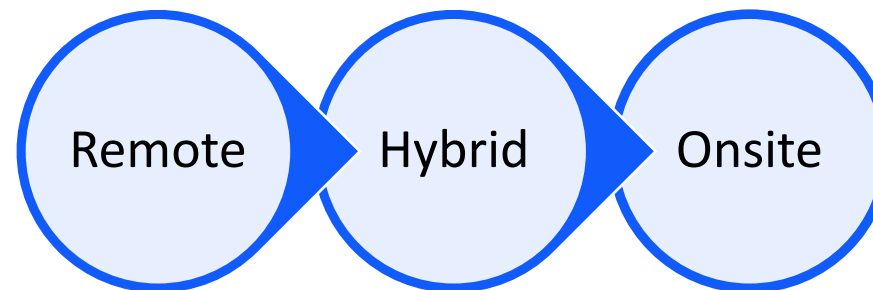
ICPSR

# ICPSR growth has settled

- Employment and finances are in equilibrium
  - Ended year with positive balance, after spending a good part of the year trying to get control of a projected large deficit as we struggled to balance hiring people with spending – and generating IDC revenue – on RDE and other sponsored programs
  - We are now hiring for normal turnover, not additional growth
- Summer program had successful hybrid program
  - Changed format to 3 + 1 + 3
  - Offered on campus housing
  - About 40% of general program participants were in-person
  - Almost 130 scholarship recipients, including 45 diversity, 6 Africa, 4 MENA, 10 Ukraine
  - Lost money, still playing with schedule

# Growth has slowed, hybrid is stable

	Nov 2018	Nov 2019	Nov 2020	Nov 2021	Nov 2022	Current (Sept 23)
Faculty	16	15	18	19	20	17
Staff	82	87	119	140	147	147
<b>Total</b>	<b>98</b>	<b>102</b>	<b>137</b>	<b>159</b>	<b>167</b>	<b>164</b>





# Computing & Network Services



**Shannon Reidy**

Front-end Developer



**Priti Duddilla**

Full-stack software engineer



**Nehemiah Naidu**

Senior Full-Stack Software  
Engineer



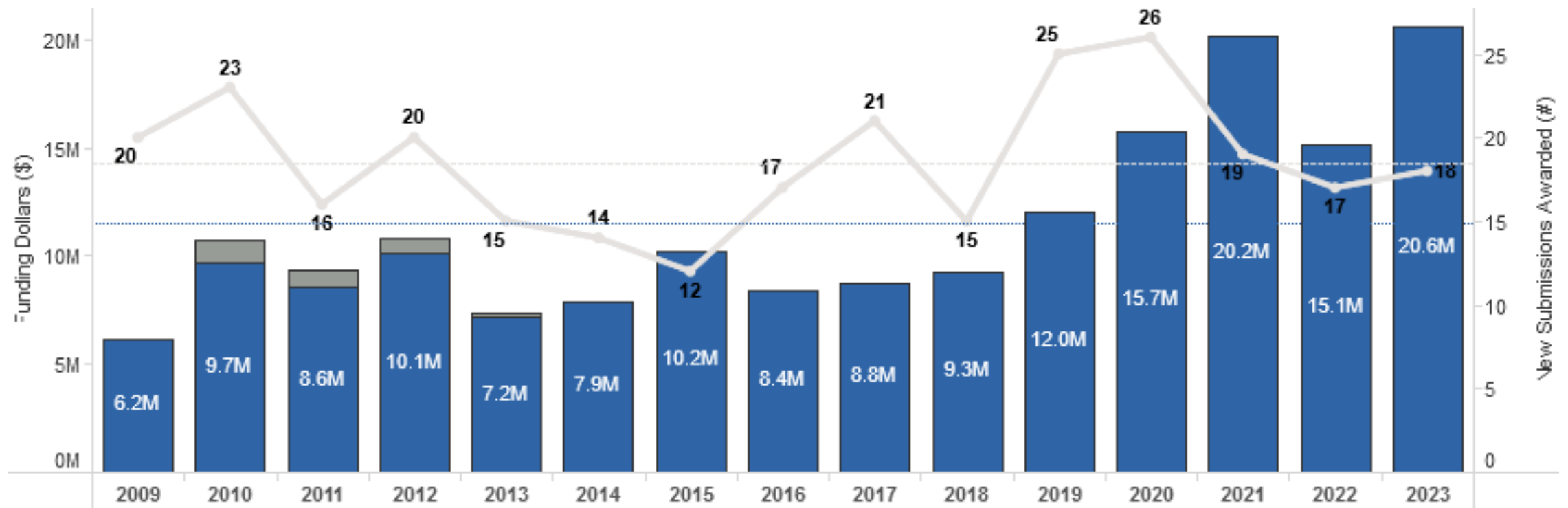
**Tao Zhao**

Senior Full-Stack Software  
Engineer

# Data Holdings and Activity

<b>Dataset Holdings (total)</b>	<b>86,029</b>
<b>On-Demand Datasets</b>	<b>72,174</b>
<b>Restricted Datasets</b>	<b>13,855</b>
<b>Self-Deposit Data</b>	<b>7,392</b>
<b>Data-related Publications</b>	<b>110,009</b>
<b>Variables (SSVD)</b>	<b>6,255,450</b>
<b>Datasets downloaded (FY23)</b>	<b>953,391</b>
<b>Active MyData Accounts</b>	<b>34,410</b>
<b>Website Visits</b>	<b>&gt;640,000</b>

# Sponsored Funding





# ICPSR Staff Engagement Survey Summary

Spring 2023

ICPSR

# Survey Characteristics

Conducted April 28 - May 12

82 responses

About 50% response rate

SurveyMonkey predicted 7 minutes

Typical time spent was 14 minutes

Lots of open-ended input

We believe in qualitative as well as quantitative data!

# Overall message

Overall, ICPSR staff feel supported by their supervisors and their peers

Staff are proud to work at ICPSR and believe it is important work and they appreciate ICPSR's initiatives to grow and adapt

Supportive colleagues. Excellent job of encouraging work-life balance. Relaxed work culture.

Blurry vision: is ICPSR predominately a tech-company or a data content & training provider? Is the mission changing?

Cross-unit and team collaboration is not a particularly rewarding experience at this time

Frustration with changing processes and lack of attention to non-RDE activities

# High Impact Research through Data Stewardship and Innovation

ICPSR

## Part 1

Overview of the new  
NIH Data  
Management &  
Sharing Policy



LOG IN/CREATE ACCOUNT

About Us Contact Us

Log In/Create Account

Search Data and Site

Search

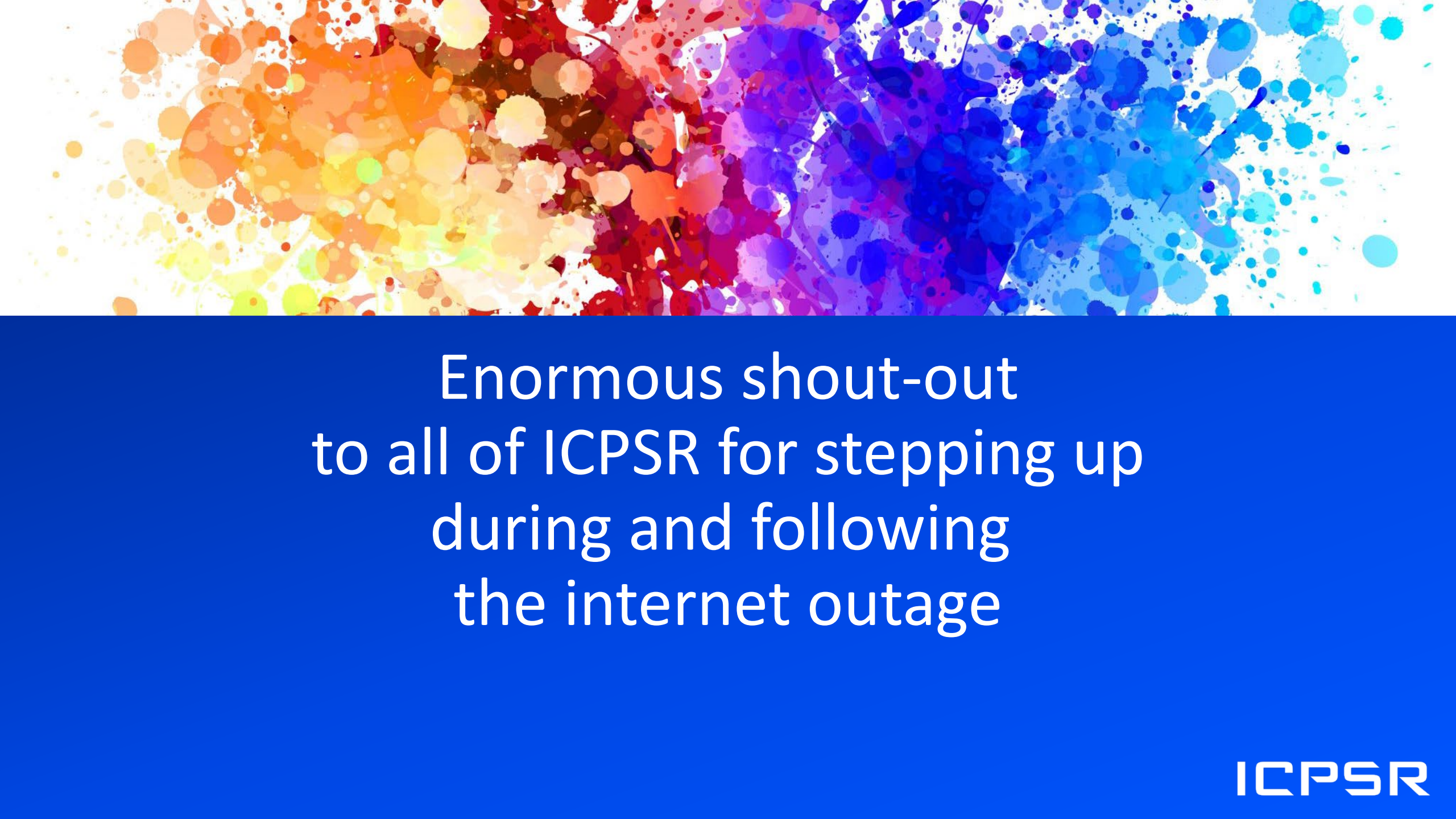
### About Us

- The National Archive of Computerized Data on Aging (NACDA), located within ICPSR, is funded by the National Institute on Aging. NACDA's mission is to advance research on aging by helping researchers to profit from the under-exploited potential of a broad range of datasets.
- NACDA acquires, preserves, and shares data relevant to gerontological research. We curate data and documentation to promote effective research use, facilitate data sharing across the research community, and provide data user support for our hosted data collections.
- By providing free access to the largest library of electronic data on aging in the United States, NACDA offers opportunities for secondary analysis on major issues of scientific and policy relevance.
- NACDA consists of a team of professional researchers, archivists and technicians who work together to obtain, curate, share, and promote data relevant to aging research.

NACDA







Enormous shout-out  
to all of ICPSR for stepping up  
during and following  
the internet outage



**Joe Saul, Linda Detterman, DevOps, and  
Desktop Support teams did the heavy lifting.**

**SPECIAL THANKS TO:**

***The ICPSR BC/DR Team***

**Joe Saul, Lead  
Dharma Akmon  
Trent Alexander  
JD Alford  
Ambyr Amen-Ra  
Becky Chu  
Linda Detterman  
Dory Knight-Ingram  
John Lemmer  
Jared Lyle  
Bianca Monzon  
Trisha Kunst Martinez  
AJ Million  
Justin Noble  
Amy Pienta  
Dan Pritts  
Kyrani Reneau  
Rujuta Umarji  
Candice Wilson**

***CNS DevOps***

**Candice Wilson, Lead  
Eris Beltran-Feliciano  
Jared Cohn  
Jamie Magiera  
Dan Pritts  
Jason Weirauch**

***CNS Desktop Support***

**Alina Conn, Lead  
Rob Gessner  
Jeff Jones**

**Laurie Howland  
Daphne Lin  
Arun Mathur**

# What did we learn from outage?

- Preparation is a really good thing
- We have incredibly smart, hardworking, collaborative staff in and out of IT
- We have technical debt that needs to be addressed

# New technology is coming

## Researcher Passport



2024

- Study Home Page
- Restricted Data Application
- TurboCurator

# It's never just technology

- Slowing down, being intentional and strategic
  - Updating platform
  - Building tools for the data we have, updating data and metadata to be able to use the tools we are building
- Reorganized Product and UX unit
- Engaging expertise, in and outside ICPSR
- Rationalizing metadata
  - Terms of use for restricted data
- Single stream
  - Sustainable model for self-published projects
- Reorganizing Consortium Archive Team

# Incoming ICPSR Councilmembers

Nominee	Institution
Courtney Bell	University of Wisconsin, Madison
Claire Bowen	Urban Institute
Jennie Brand	University of California, Los Angeles
Sandra Marquart-Pyatt	Michigan State University
Gisela Sin (Chair)	University of Illinois, Urbana
Janet Stamatel	University of Kentucky
Michael Steelworthy	Wilfrid Laurier University

# ICPSR Awards



The graphic is a celebratory announcement for the 2023 ICPSR Awards. It features a dark blue background with a pattern of small, light blue confetti. At the top right, the ICPSR logo is displayed in white. The word "Congratulations!" is written in a large, white, cursive font, underlined with a gold brushstroke. Below this, "2023 ICPSR Awards" is written in a bold, white, sans-serif font. A central white box contains the text "Simmons Award for Social & Behavioral Research Data Contributions" and "Surveys of Consumers" in bold, with "University of Michigan Institute for Social Research" in a smaller font below. At the bottom, two white boxes are side-by-side. The left box features a portrait of Katharine G. Abraham, a woman with short grey hair and glasses, wearing a dark jacket and a patterned scarf. To her right, the text reads "Miller Award for Meritorious Service to the Social Sciences" in bold, followed by "Katharine G. Abraham" and "Distinguished University Professor, University of Maryland" in a smaller font. The right box features a portrait of James A. Jacobs, a man with short brown hair, wearing a dark shirt, gesturing with his hands. To his left, the text reads "Flanigan Award for Distinguished Service as an ICPSR Official Representative" in bold, followed by "James A. Jacobs" and "Data Services Librarian Emeritus, University of California – San Diego" in a smaller font.

**ICPSR**

*Congratulations!*

**2023 ICPSR Awards**

**Simmons Award for Social & Behavioral Research Data Contributions**

**Surveys of Consumers**

University of Michigan Institute for Social Research

**Miller Award for Meritorious Service to the Social Sciences**

**Katharine G. Abraham**

Distinguished University Professor, University of Maryland

**Flanigan Award for Distinguished Service as an ICPSR Official Representative**

**James A. Jacobs**

Data Services Librarian Emeritus, University of California – San Diego

*Biennial Meeting 2023*  
**NextGen ICPSR**

*October 4-6, 2023*

# Questions



# Thank you to our outgoing Councilmembers

Council Member	Institution
Dave Armstrong (Chair)	Western University
Bobray Bordelon (Past Vice Chair)	Princeton University
James Doiron	University of Alberta
Kristin R Eschenfelder	University of Wisconsin - Madison
Mark Hansen	Columbia University
Trevon Logan (Vice Chair)	Ohio State University
Ken Smith	University of Utah



# 2023 Innovator of the Year



# Bing She, Chief Architect, Research Data Ecosystem

For developing the architecture that will make online data exploration and analysis tools using R run much faster. Previously, the application would crash because of issues interacting with R. Under this new architecture, even multiple students in a classroom are able to use the online tools without issue. Data exploration will be more reliable and performance greatly improved thanks to Bing's work.



**ICPSR Operating Budget and Year-End**  
Fiscal Year 2023 Budget and Year-End Projection  
Fiscal Year 2024 Proposed Budget

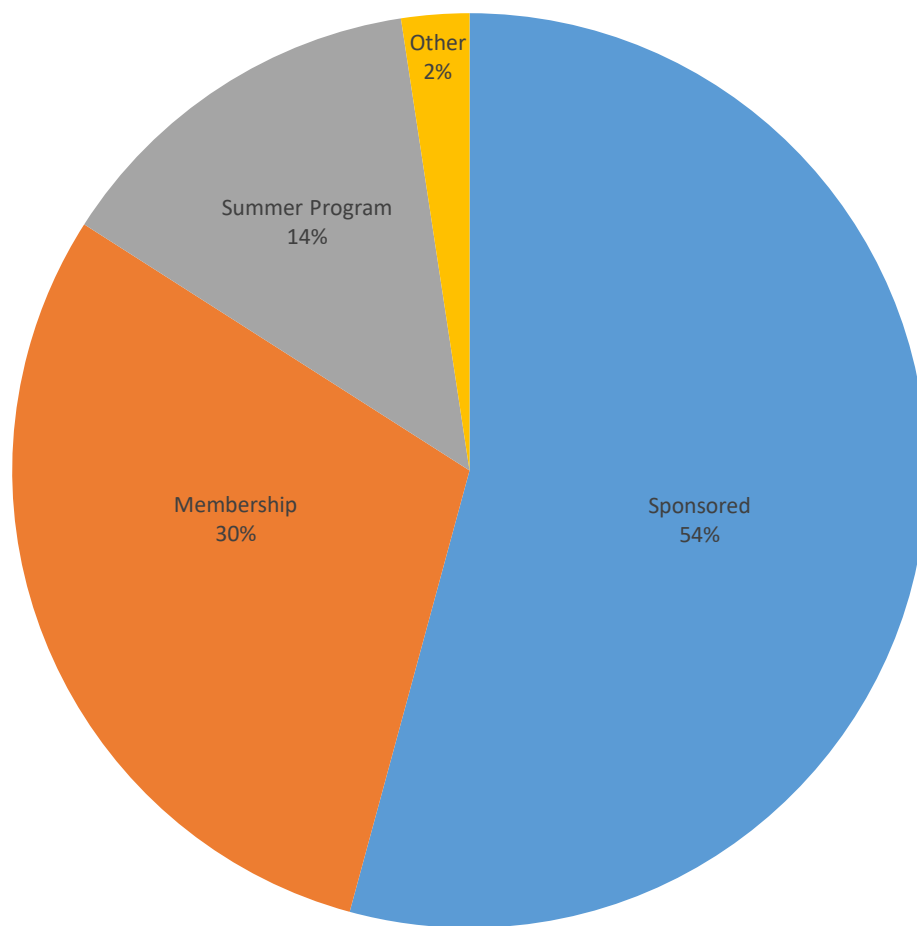
\*\*\* This display does not include sponsored direct revenue or expenses \*\*\*

	<b>FY23 Budget</b>	<b>FY23 Projection as of 2/28/2023</b>	<b>FY24 Proposed Budget</b>
<b>Total Revenue</b>	<b>14,754,000</b>	<b>14,074,941</b>	<b>15,185,293</b>
Unit Expenses	12,859,000	12,157,993	12,759,996
ICPSR Overhead	2,153,000	2,358,000	2,207,320
<b>Total Expenses</b>	<b>15,012,000</b>	<b>14,515,993</b>	<b>14,967,316</b>
<b>Operation Surplus (Deficit)</b>	<b>(258,000)</b>	<b>(441,052)</b>	<b>217,978</b>

## ICPSR Operating Revenue by Category

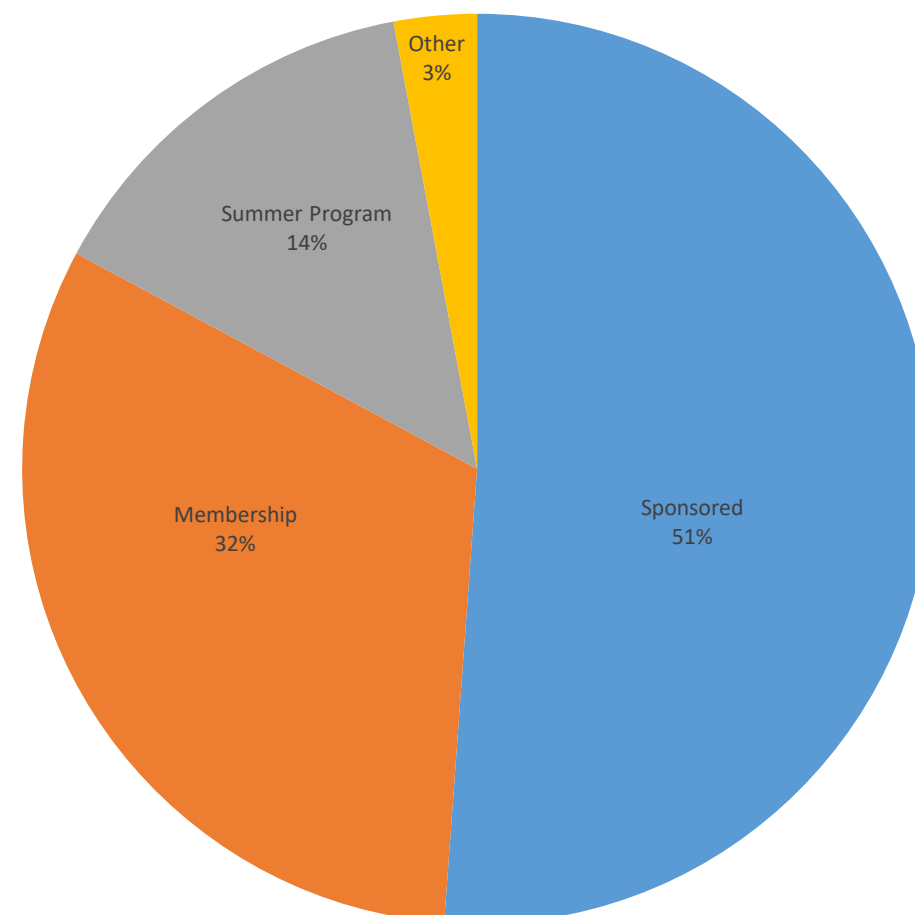
\*\*\* This display does not include sponsored direct revenue \*\*\*

FY2023 Budget



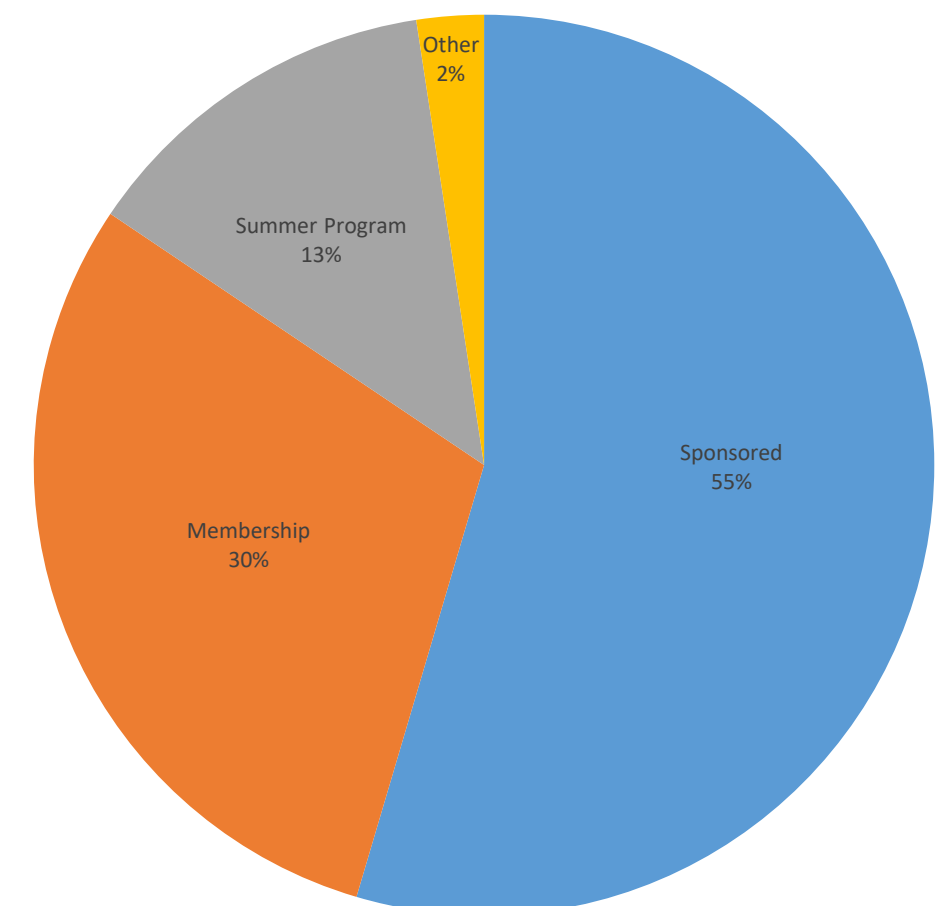
Total: \$14,754,000

FY2023 Projected Year-End



Total: \$14,074,941

FY2024 Proposed Budget

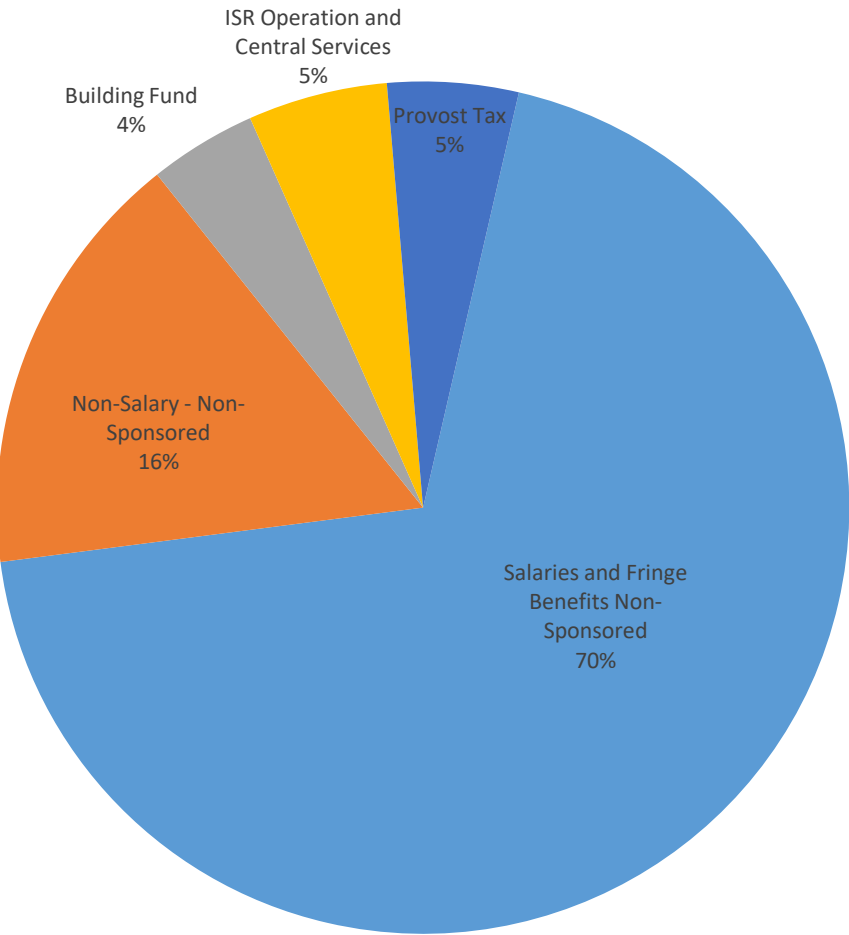


Total: \$15,185,293

ICPSR Operating Expense by Category

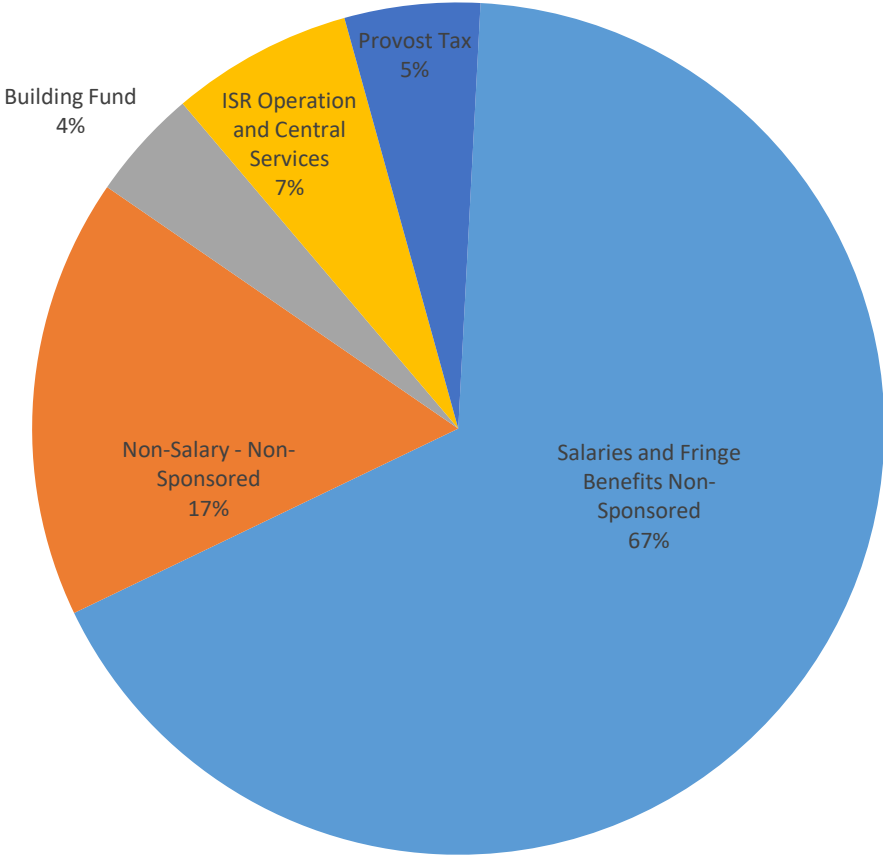
\*\*\* This display does not include sponsored direct expenses \*\*\*

FY2023 Budget



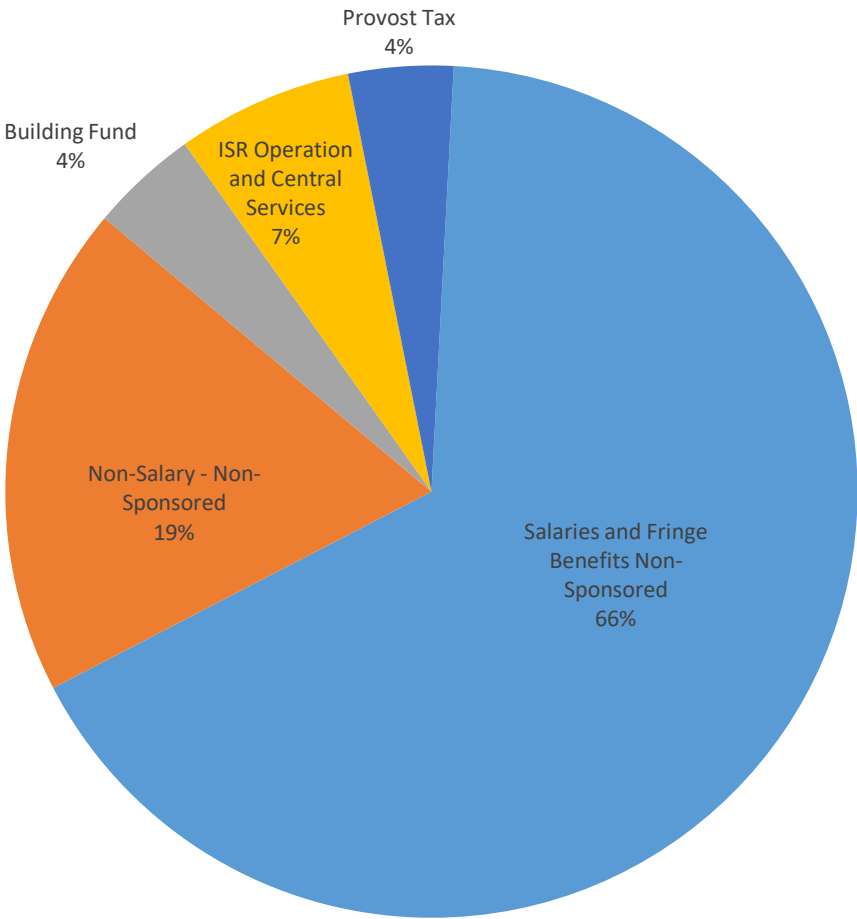
Total: \$15,012,000

FY2023 Projected Year-End



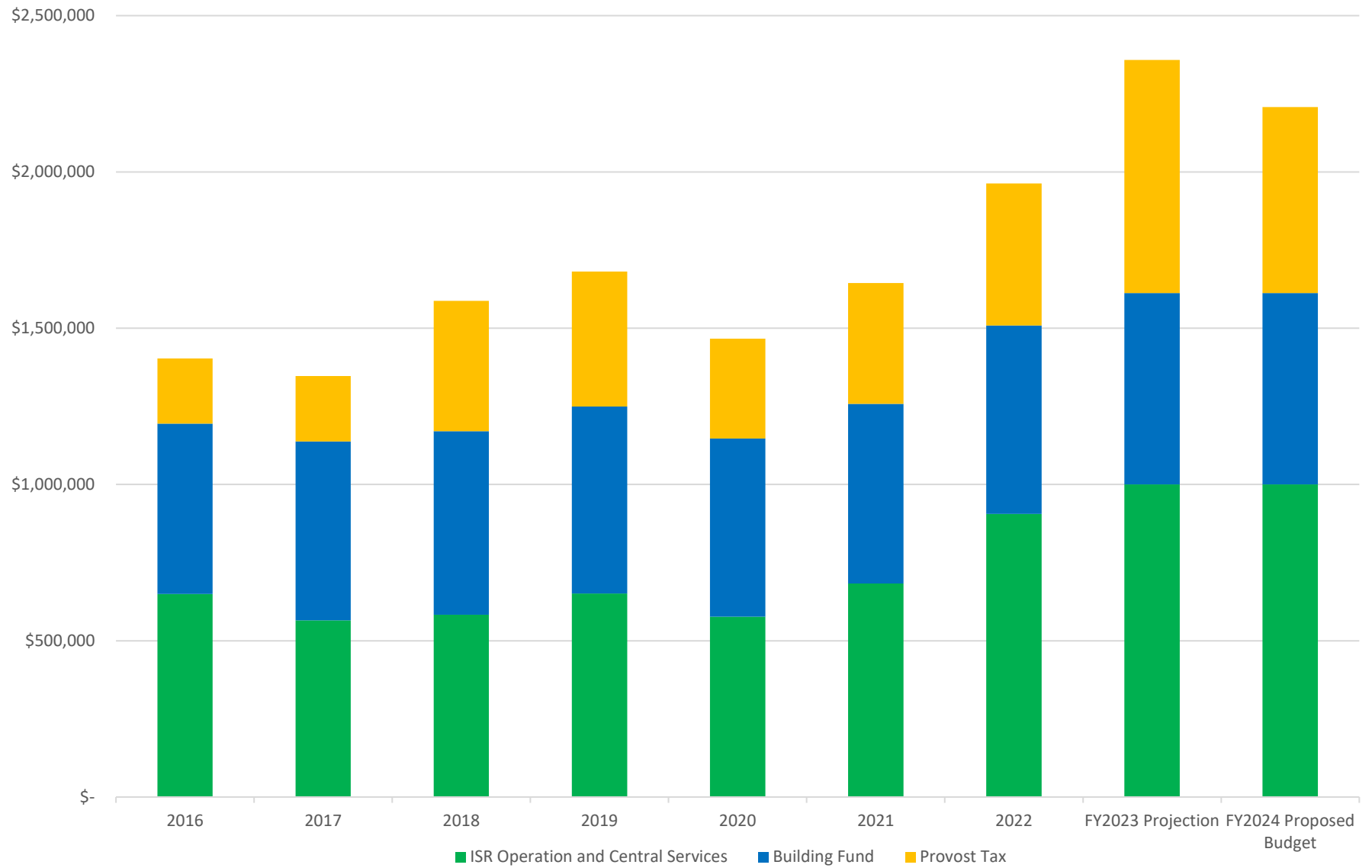
Total: \$14,515,993

FY2024 Proposed Budget

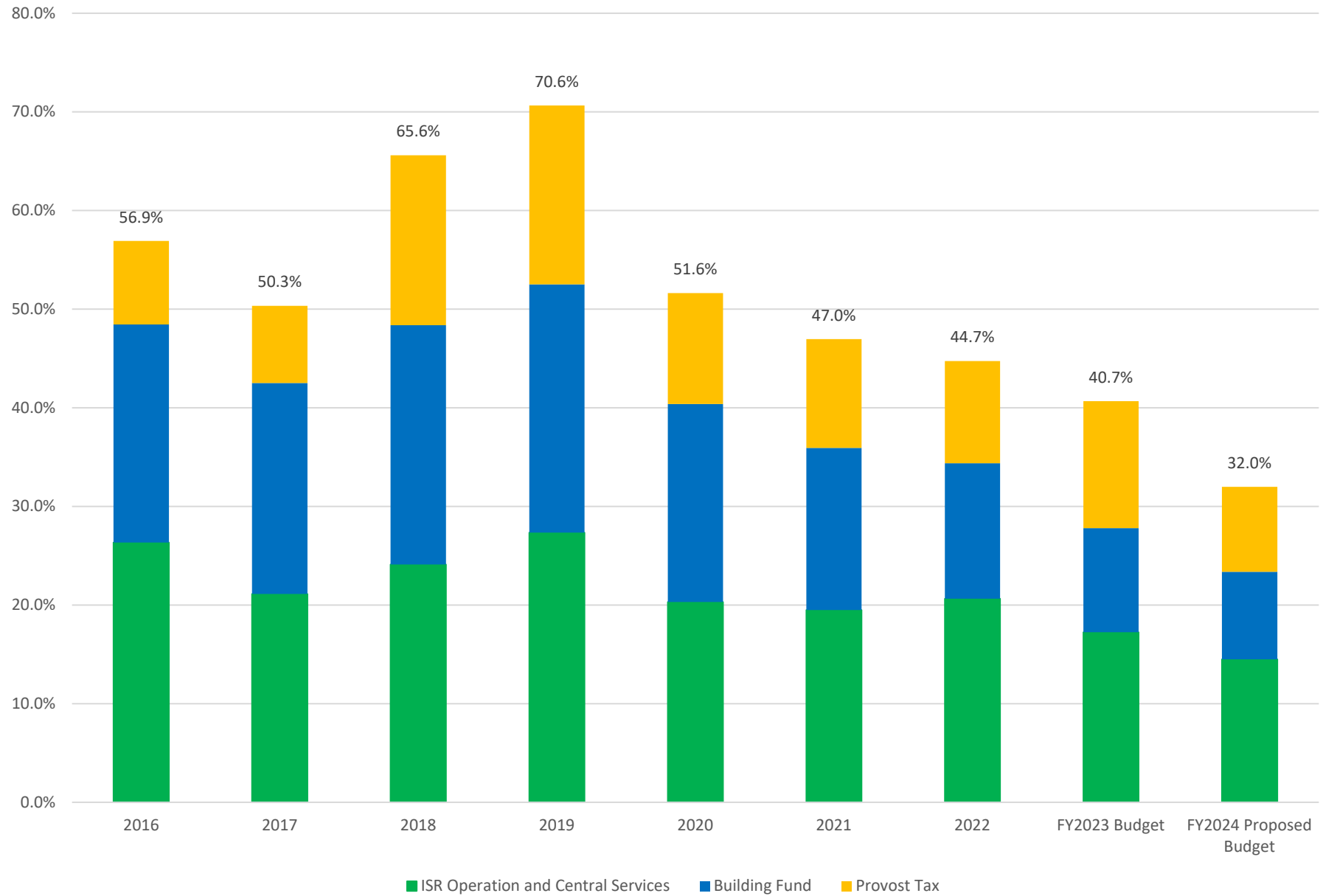


Total: \$14,967,316

## ICPSR Taxes and Rent



Percent of Indirect Cost Revenue that Pays for ISR Central Costs



**ICPSR Staffing Growth**  
Full Time Equivalent

<u>Functional Unit</u>
Administration
Business and Collection Development
Computing and Network Services
Curation
Director's Office
Education
Membership and Communications
Metadata and Preservation
Product Managers
Project Management and User Support
<b>Total FTE's</b>

<u>1/1/2020</u>	<u>1/1/2021</u>	<u>1/1/2022</u>	<u>1/1/2023</u>
7.0	7.0	7.0	8.0
7.3	10.8	10.3	10.8
15.0	24.0	43.0	50.9
28.0	43.6	40.9	32.9
8.4	8.1	6.0	9.0
0.5	0.8	0.8	0.8
10.4	9.5	11.5	9.7
6.0	7.0	8.0	9.0
0.0	0.0	5.0	7.0
<u>18.7</u>	<u>27.7</u>	<u>29.7</u>	<u>29.7</u>
<b>101.3</b>	<b>138.4</b>	<b>162.1</b>	<b>167.7</b>

<b>FY2024 Proposed Budget</b>		
<u>Sponsored</u>	<u>Non-Sponsored</u>	<u>Total</u>
0.4	6.6	7.0
7.3	1.3	8.6
34.5	29.5	64.0
21.0	10.0	31.0
3.1	5.9	9.0
0.0	0.8	0.8
2.0	7.7	9.7
5.2	4.8	10.0
6.0	1.0	7.0
<u>24.5</u>	<u>7.2</u>	<u>31.7</u>
<b>104.0</b>	<b>74.8</b>	<b>178.8</b>

**Total Salary and Benefit Costs:    12,545,213       9,960,097       22,505,311**



# Summer Program Committee Report

ICPSR Council Meeting  
October 3, 2023

# 2023 Program Review

- Two 3-week *General Sessions* with 1-week Intercession
  - 44 total courses (courses + lectures)
  - People appreciated all the options, but identified the days as being very long.
- Housing was available through UM
  - Uptake was good, but not what was initially projected.
  - Adjustments will be made for 2024.
- Attendance
  - Return to pre-pandemic levels of registration
  - In-person attendance was up from last year (roughly 50% in general sessions).
  - (Short) *Workshops* – almost all attendance was online.
  - Lots of scholarships, some deals on tuition

# Planning for 2024

- How to shorten the day?
  - **Move math/computing courses to the week before the first session in an online format.**
  - Move math/computing courses to the week before the first session in a hybrid format.
  - Maintain 3-week general sessions with math/computing classes, but shorten breaks and overlap computer classes that are likely to attract different audiences.
  - Move math/computing courses to a fully asynchronous delivery.
- Adjust cancellation & refund policies (and maybe fees more generally)
- Format of the workshops – should they be online only from the start?
- On-campus housing – better estimate demand.
- Use Betsy Barbour (when Helen Newberry is being refurbished) or look for another option?

# Conclusions

- Summer Program returns to form (in many ways) in 2023.
- Challenges remain for 2024, but the Summer Program is iterating toward a viable model.
- Optimizing pricing/delivery format/incentives for in-person attendance are the main goals.

# ICPSR Technology & Standards Committee Report Fall 2023

Attendees: Michael Cafarella, Kristin Eschenfelder, Ken Smith  
Dharma Akmon , Trent Alexander, Jared Lyle, Trisha Martinez, Mike  
Shallcross, Rujuta Umarji

## Recruiting and Retention

- Challenges still exist, but positions are being filled.
  - Creative problem solving for international staff
- In Curation, a significant reduction in turnover.

# New Unit! Product and User Experience Unit

- Creation of Product and User Experience Unit.
- Three areas with a Director.
  - Product Management, Design, UX Engineering
- Two units were previously in C&NS.
- Change in Director (Dharma → Aalop)
- Why the move?
  - Product owners need to be outside of IT to translate well between users and IT.
  - More sizable overall unit.
  - Makes C&NS a more manageable size.

## Curation

- Noted decline in unit turnover.  
What made the difference? Worked on issues uncovered in morale survey
- Reduction in times for many curation levels.  
Why? More experienced staff makes it easier to reduce time statistics.
- Time tracking – time cards vs systems based tracking.  
Jira facilitates project management, but time tracking issues: staff feel surveilled, discourages certain community behaviors, difficult to correctly bill supervisors time.



## Curation - goals

- Continue to work on unit climate goals
- Continue to implement changes to the curation levels

# Metadata & Preservation

- Completed large longitudinal series project using DDI Lifecycle.
- Preservation Commitment Policy published for the first time.
- Continued work on new data model
- Work to ensure RDE is preservation standards compliant
- NIH grant to improve metadata exports

- Review of early fall cybersecurity incident and how ICPSR disaster planning played out in action. No data collections threatened, but collections offline.
  - Business Continuity and Disaster Recovery plan had been updated recently and they benefited from that.
- Hiring has gotten better. Salaries are still an issue. Turnover is still an issue. Hires are succeeding.
- Review of products Under Development:
  - Authorization & authentication (makes use of Researcher Passport);
  - Updating study overview pages. Make more flexible for future changes to data types etc.
  - Turbo Creator - metadata creator aid; uses OpenAI to provide suggestions to depositors using DataVerse (will eventually use in ICPSR deposit)
  - Basic file operations analysis and redesign
  - Researchdata.gov incorporating feedback