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Librarian and Faculty ORs: Shifting Roles and Social Capital

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When I attended the biennial OR meeting in October of 2007, I was surprised by the ratio of librarians, data librarians, and other library faculty, to teaching faculty and research scientists. Of course this would not be a surprise to anyone who had been closely connected over the years, nor would it surprise someone representing a new member institution. But to someone whose first introduction to the Consortium was in the early 1990s, with a long gap in between, the surprise was accompanied by fascination.

The OR Summer Sabbatical offered a perfect opportunity to examine

the phenomenon. I spent June in Ann Arbor, sifting through data and feedback submitted to the Consortium and speaking with those who had worked at ICPSR for many years. I also began a more in depth reading of a theoretical framework that might help me to best articulate the phenomenon I had identified. While Rui Wang examined a rich history of the consortium and the role of the OR as it related to technological change, I worked to articulate a social model that could explain the shift in representation.

The OR Field Shift

As the university homes of ICPSR (and dues payers) moved from academic departments and data centers to campus libraries, most of the ORs and ICPSR employees I encountered attributed the shift to fiscal concerns, at least at first consideration. The cost of ICPSR membership was too high, and the OR



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approached other cost centers offering the membership up for adoption, finding success at the campus library. The cost of ICPSR membership had been much higher in the past, however, especially in real terms. The role of the OR his or herself usually required a full-time position and a full-time salary, and there were other material costs associated with maintaining a campus home. In real terms, the cost of ICPSR had gone down as significantly and as rapidly as technological change advanced.

No one I interviewed questioned the importance of technological change. In

See Librarian and Faculty ORs, p. 2

In this issue

Librarian and Faculty ORs: Shifting Roles and Social Capital	1
The Evolving Role of the ICPSR Official Representatives	3

Librarian and Faculty ORs (cont. from page 1)

the end, however, technological change could not explain the migration by itself. An established organizational literature suggested that when technology makes a task easier, professional and institutional fields would spar to determine who retained control of the task. In simplest terms, one could have easily predicted that academic departments and research institutes would fight to maintain their status as economic homes to ICPSR and to the OR role, not scramble to give it away. Yet the shift appeared to reflect independent decisions on the parts of academic departments and data centers to approach campus libraries, asking that the library adopt the membership on behalf of the institution.

In Ann Arbor I was afforded time to sort through handwritten responses that came at the ends of those OR surveys from years ago. ICPSR staff provided endless patience, sometimes a few minutes, and other times hours of narrative content. Eventually, I posited a model that wove aspects of technological change, the social capital associated with data access, ethical systems that were differentially associated with teaching faculty and librarians, and real capital of the kind that determines institutional budgets.

Library work and social scientific research occur in differing “institutional fields” by almost any definition, making the phenomenon best described as a “field shift.” I’m grateful to Lisa Bier, social science librarian at Southern Connecticut State University, who identified important theoretical literature for my benefit. She also provided a crash course in the history of librarianship, including a literature that could address the model from the library’s perspective.

Declining Social Capital

With the help of the membership data, both quantitative and qualitative, and an immersion in an emergent organizational and economic-sociology literature, I identified several social factors that either accommodated or were catalyzed by technological change. The first was a decline in social capital affiliated with the OR position in the role of gatekeeper.

In the early 1990s, to access ICPSR data, I made an appointment with our university OR. I waited for the data tape to arrive from Ann Arbor, and then waited several weeks more for our department’s data manager, also the OR, to extract my variables.

When the data catalog was printed on paper, and data delivered on tape, the OR made decisions to meet or not meet with someone seeking data, to prioritize the order of meetings, and to prioritize the order of attention given to data requests. Small changes in order of attention to faculty data needs could result in weeks of waiting time for the eager researcher. The OR also maintained her gatekeeper position as a data management expert.

ICPSR was about to encounter a clear shift in membership representation, from one that had been dominated by research and teaching faculty, as well as data managers, to one in which librarians and library faculty members were the majority.

As the technologies of data curation and distribution advanced, the leverage of the gatekeeper position and the expert role both declined, which is what sociologists would call a decline in social capital. And the changes were immediate. The changeover from magnetic tape to CDs, desktop media, and FTP meant that the preparation of variables for analysis now rested in the hands of the end user rather than the OR, reducing hours of waiting time. The ability to browse data online without an OR appointment also made the OR’s tasks easier. The shift didn’t occur without resistance, however. More than one OR respondent complained that FTP made the work of the OR much more difficult, and pleaded for a return to tape cartridges.

Additional social capital slipped away as the hours accompanying OR activity declined. Using ICPSR Direct, end users enjoyed new control over data management. Loading large variable sets was worth the input frustration. Once highly valued, portions of OR expertise became more common. Academic departments, paying attention to how their members spent time, allotted less credit for OR service. As the space required for magnetic tapes and codebooks diminished, so did the departments’ and research centers’ justifications for building space. Fewer resources were budgeted to the academic department to store and manage data. The only social capital that remained was the remnant status associated with the OR role itself. Most departments and research centers did not find this individual status worth the cost of membership.

The decline in social capital associated with housing ICPSR campus memberships only tells part of the story. There were some subcultural factors that accommodated

The Evolving Role of the ICPSR Official Representatives

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Since the inception of ICPSR, the Official Representative (OR) system has been built into ICPSR's organizational structure, linking ICPSR with its member institutions. The 2007 ICPSR Official Representative Handbook defines the role of the Official Representative in this way: "In all ICPSR activities, each member institution is represented by a locally designated person known as the Official Representative. The OR serves as the primary contact person for communication between the membership institution and ICPSR staff" (Introduction section, para. 3). ORs have played a significant role in representing each member institution, delivering resources and services, and assisting users.

The OR role has evolved over time, in large part because of transformations at ICPSR and changes in technology. During my OR Sabbatical at ICPSR in the summer of 2008, I researched the history of the OR role, looked at results from OR surveys, and reviewed ICPSR documents and publications. This paper represents a précis of my findings. Since the OR's role changes as technology changes (Rockwell, 1995), it is useful to approach the topic historically across three technological eras: punch cards and magnetic tapes, "alternative media," and the Web.

Punch Card and Magnetic Tape Era

This era represents the early years of the Consortium in which ICPSR disseminated data through punch cards and magnetic tapes. This goes back to the beginnings of ICPSR when a group of young social scientists at the University of Michigan's Survey Research Center who were at the center of the movement of the behavioral-quantitative social sciences established the Consortium with 21 universities in the summer of 1962 (Blalock et al., 1989; First Annual Report, 1963). At that time, the Consortium was called the Inter-university Consortium for Political Research (ICPR), because it was rooted in the discipline of political science (it was not changed until



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1975). In ICPSR's founding document, the *Memorandum of Organization*, the OR is described in this way: "Each unit will designate one of its faculty members as the official representative to sit on a Committee of Representatives and take action on behalf of the participating unit" (ICPR, 1962). In this early document, the Committee of Representatives seems to hold the ultimate power of decision-making for the Consortium in summit meetings. The OR's role was spelled out in more detail in a later ICPR brochure: the ORs were expected to serve "as the liaison between the home campus and ICPR. The representative coordinates access to ICPR resources and represents the member institution at ICPR meetings" (ICPR, n.d., p. 10). This expectation sets up three essential functions around the liaison role:

- Membership — Ensuring the member's financial duty and rights.
- Governance — Representing the member institution at ICPSR meetings and electing Council members
- Technical assistance — Providing access to data and help in using it

In the early years, the technical assistance role required a lot of time of the OR. The OR functioned as the pipeline between ICPSR's headquarters in Ann Arbor and the home institutional users, because punched cards and expensive magnetic tape were the only portable media on which to transfer data. The OR was at that time solely responsible for ordering data and receiving printed materials from ICPSR for the entire member institution. A detailed procedure of data delivery is vividly described in an undated ICPR brochure:

See *Evolving Role of ORs*, p. 4

Evolving Role of ORs (cont. from page 3)

Information on members' local computing facilities is maintained on file at ICPSR. When a data set is needed on a campus, the local ICPSR representative notifies the archive on a standard request form and either sends a blank magnetic tape or requests ICPSR to supply the tape at cost. The archival staff, in turn reproduces the data requested onto the member's tape and mails the data tape with codebooks (when the latter are not already held by the requestor). Data are normally sent to the representative within two weeks of the time the request arrives at the archive (n.d., p. 4).

In the early period, most ICPSR users were political scientists and "initially the council members were all political scientists" (Blalock et al., 1989). According to an ICPSR survey report on local arrangements collected in December 1965, "The political science departments of the member schools are the most actively involved in the Consortium" (1966, p. 159). The next generation of ORs shifted from the founders to more junior political science faculty, but nevertheless, these junior professors were still committed to the Consortium's mission.

These faculty ORs were often the prime users of ICPSR services on a campus (Rockwell, 1995, p. 20). It was not uncommon that an OR could be a pioneer of quantitative social science research who produced or deposited data. The same person could be the expert to transfer data and the consultant to provide advice for data manipulation on a local campus. The OR might teach in the Summer Program and also hold a seat as a Council member. As social science data creators and users with these integrated personal roles, these ORs shaped the OR legacy early in ICPSR's history. They were, indeed, the backbone of ICPSR.

The political power of governance and the disciplinary identity of political science of the OR group remained strong at that time. The 1975 OR survey concludes that: "the departmental affiliation of Official Representatives is overwhelmingly that of the Political Science department" (ICPSR *Bulletin*, 1976, p. 1). In total, 83 percent of ORs were political science faculty. Almost all political science departments used ICPSR resources and were involved in ICPSR decision-making at that time.

"Alternative Media" Era

This was the early Internet period when punched cards and magnetic tapes were replaced by the newer desktop

technologies. The February 1992 issue of the *ICPSR Bulletin* first reported that ICPSR data collections were being distributed by "three forms of alternative media: diskettes, CD-ROM, and network file transfer. (p. 7). ICPSR was able to heavily rely upon FTP for delivery of data. CD-ROMs were also used for "a substantial advantage over FTP for transmittal of many large data sets, because they use no network time and provide their own local storage" (Rockwell, 1995, p. 12).

The decentralized desktop delivery technologies brought opportunities for ICPSR to reach out to its end users directly. There was an awareness that "When FTP becomes the dominant mode of distribution of data, it will make little sense for ICPSR to transmit data solely to a campus's Official Representative" (Rockwell, 1996, p. 102). There was an understanding that direct, personal access to ICPSR was "the clear preference of many social scientists," and Rockwell predicted that "providing centralized service seems archaic and is clearly not the wave of the future" (1996, p. 102).

During this period, there was a substantial increase of data librarians and professionals in the OR group. The 1988 OR survey indicated an increase of data professionals from 2.8% in 1975 to 12% in 1988. In addition, the size of the data collection increased and the number of memberships expanded. The organizational growth of ICPSR needed greater efficiencies for its operation. As Rockwell concluded, "Relying on an Assistant Professor or a graduate student works less well today when ICPSR provides services that are needed across the campus. The professional Data Librarian is, in general, far better prepared and positioned to provide technically adept services to an entire institution" (1995, p. 20).

Data librarian ORs brought more attention to issues of data management and bibliographic control, which was a positive development. However, the ownership and attachment to data diminished as the number of faculty ORs decreased.

Web Era

Web technologies provided decentralized and direct access to data with ICPSR Direct, which began in 2001. ICPSR users were able to download data and cookbooks themselves, search the Web to locate data files, and read announcements for updates without having to go through an Official Representative. However, the personalized



technical assistance for local users still resided with the ORs.

In the Web era, a new function — promoting ICPSR resources and services — was added to the three existing OR functions. See Figure 1.

Figure 1. Four functions of the OR role

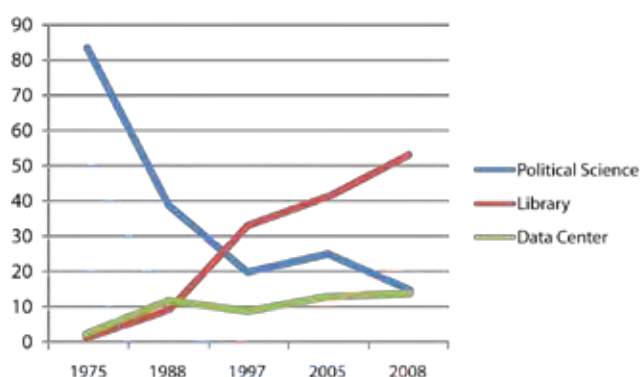


In fact, when conceiving “a new conceptualization of the liaison role of the OR” in 1995, Rockwell suggested that, “They (ORs) could be advocates for ICPSR on campus” (p. 20). The current role is described in the 2007 edition of the OR Handbook, under the section Role and Responsibilities of the Official Representative.

Overview of OR Affiliations at Member Institutions

The changes in the composition of the OR community have been quite dramatic. Five OR surveys conducted over three decades indicate a continuing increase of librarian ORs and a shrinking of the number of faculty ORs. Figure 2 shows the changes of the OR group in the 1975, 1988, 1997, 2005, and 2008 OR surveys (Detterman).

Figure 2. Changes in OR composition over time



The political science faculty ORs, the traditionally dominant group, has almost become a minority group in 2008; the percentage of the ORs from libraries increased from 1.4% to 53%. Data professionals have remained relatively unchanged for the last two decades. Since 1997, the library group has become the largest OR group. What has the shift meant to the OR role? The OR legacy created by the highly dedicated founding political scientists only lasted for a short period. Can the shift in the composition of the OR group bring an opportunity to revitalize the OR role?

Challenges and Opportunities

Who are the OR librarians? According to the most recent membership list of OR titles, a number of the ORs affiliated with libraries are social science and government document librarians. The library group also includes various types of librarians, such as cataloging/acquisition/electronic/system/map/instruction librarians. Data librarians have been a valuable commodity, but they are still a small fraction of librarian ORs. (There are virtually no Data Librarian programs in most library science graduate schools. Most data librarians are self-taught on their jobs in terms of acquiring IT expertise and statistical competencies.) It is evident that not all librarian ORs are assigned by their professional positions related to data or social sciences. Some librarian ORs are assigned as ORs simply because they are located in the financial unit responsible for membership dues. Librarian ORs can encounter both challenges and opportunities, when performing the four functions of the OR role.

Technical assistance

The 2008 survey reveals that the majority of OR respondents (62%) do not have PhDs and hold master’s degrees as their terminal degrees, which is common for librarians. Two-thirds of respondents from libraries declare that they do not personally use ICPSR for research or in-class instruction. Conversely, the majority (71%) of non-librarian OR respondents say “yes” to the question about using ICPSR themselves. Use of ICPSR data to conduct research/teaching is a clear-cut distinction between faculty ORs and librarian ORs. Since a faculty OR is usually an ICPSR user and considered an expert on a local campus,

Evolving Role of ORs (cont. from page 5)

the question arises: How can an OR who does not use ICPSR data serve ICPSR users?

Compared to faculty and data professional ORs, librarian ORs, especially non-data librarians, have a steeper learning curve in using data. The 2008 OR survey asked the question, “What one improvement in products or services could ICPSR make that would help you in your role as OR work more effectively with data users at your institution?” An OR from a library responded “Don’t use it, and not familiar enough to comment.” Another librarian commented that “This is not an improvement that ICPSR could make, but I wish I had time to learn and practice with the data so I could help users better ...” Another similar answer: “ICPSR often refers people to me as OR for technical assistance downloading data. I do not have SPSS or SAS in the library and cannot help them. I see it as a role of finding data in ICPSR, but it’s up to the user and their department to actually use it.”

In contrast, faculty ORs tend to make specific comments that reveal their user experience in answering the same question: “Continuing to update older data files to multiple format statistical programs” (by an OR from the political science department). Data professionals like to target specific technical issues in responding to the same question: “Continued extension of data in SDA data center.” “Allow download of a single file without having to use the data cart.”

However, librarian ORs have not hesitated to learn how to use ICPSR data. Survey responses indicated that both newcomers and veterans to the librarian OR role are willing to devote their time to improving their data skills. Their willingness to learn will help librarians acquire the skills to serve users at a certain level quickly. Librarian ORs need to be familiar with available support networks to refer users with more in-depth technical problems to the appropriate expert as quickly as possible. This network can include local faculty expertise, the computing/statistics center, veteran ORs in other institutions, and ICPSR staff.

Although some librarian ORs may be “statistically” or “data” challenged, compared to faculty ORs, they may be more approachable, visible, and more adapted to the service role. They are willing to spend more time to interacting with users and building long-term personal relationships with ICPSR users. Moreover, librarians’ professional experience in utilizing various collections

outside of ICPSR will provide a complementary strength in assisting users with finding data relevant to their research.

Promoting ICPSR service and resources

Many librarians are natural promoters. They are enthusiastic in promoting ICPSR or any resources that could be useful for faculty and students. When asked “If you could create time in one area and/or activity, what area and activity would that be?” in the 2008 OR survey, a number of librarian ORs were willing to devote their time to promoting ICPSR resources, while none in the other OR groups gave such an answer.

Librarians also seem to better understand the essential principles of collection development and services than the ORs with other affiliations. When explaining ICPSR’s relationships with social scientists, Rockwell stated that, “ICPSR has thus resembled good libraries more than it has resembled research projects” (1995, p. 46). Today, libraries and ICPSR are interested in many common issues related to institutional/open repositories and digital archiving, preservation, dissemination, and access. For example, librarian ORs may have opportunities to work with researchers at “pre- and post-publication stages of the data life cycle” (Gold, 2007) to break down institutional barriers, and channel researchers to deposit their data into the ICPSR collection.

Governance

Over the years, the ICPSR user community has become diversified with more new memberships at smaller universities and colleges. New librarian ORs are usually from these institutions and they can be the voice of these newer members in the issues related to using ICPSR for teaching undergraduate programs and in seeking collaborative support and resources from established members. In sum, librarian ORs’ professional expertise may contribute more diversity to ICPSR governance.

Membership

Although there are many aspects of the local institutions’ relationships with ICPSR, paying membership dues is perhaps one of the most visible. Librarians are warriors in the battle of fighting commercial companies’ overpricing. However, one needs to understand the nature and history of ICPSR in the sense that it is based on a “collective



enterprise,” (Crewe, 1989, p. 161) or membership dues could be mistakenly viewed as being the same as commercial subscriptions. Founded by leading social scientists and guided by outstanding academic leadership, ICPSR has proven to be a leader in the enterprise of social science over almost half a century. Librarians are in a unique position to understand and advocate for the importance of the ICPSR membership at their institutions. Membership dues are only one part of many valuable investments in the ICPSR enterprise made by users, researchers, students, and policy makers that benefit the social sciences overall.

Conclusion

The role of the OR has been evolving during the nearly 50 years that ICPSR has been in existence, with the composition of the primary OR group shifting from largely social science faculty to librarians. These changes present challenges and opportunities for librarians who facilitate and support the social science research community. As ICPSR advances in terms of technology, librarians bring unique skills and abilities to each of the four OR responsibilities — membership, governance, technical assistance, and promotion.

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Librarian and Faculty ORs (cont. from page 2)

the membership representation shift. Of course the shift accelerated, chronologically, behind the technological changes associated with moving data access online and opening it to individuals. At the same time a data culture, visible in most research centers, fed the ORs' recognition that a more responsible home was needed for ICPSR on the university campus. An ethic that data must be shared permeates most scientists' lives so completely that we spend only as much time describing that ethic as we do describing the air we breathe. The obvious home to ICPSR membership was the library, where any member of the institution could access ICPSR data easily, and might be afforded the support of a librarian to find just the right dataset.

A New Symbiosis

At the library there was another, symbiotic set of subcultural norms. Where the scientist had an interest in seeing data shared more freely, the library was committed to making that happen. In addition to fostering free access to information, the university library enacts a variety of functions that make this possible. Among these is the charge to grow, to acquire information in a growing number of formats, and to keep that information increasingly accessible to campus communities. Yet, every time a department OR approached the library proposing adoption of the OR role, it offered librarians another opportunity to fulfill the library's mission. The high level of cooperation often surprised the faculty member. Yet, there can be little wonder the best librarians saw it as an opportunity.

The field shift, with OR representation migrating from research/teaching faculties to libraries, is not over. In fact, there are many ORs on record who have passed their responsibilities to librarians who are already working as Designated Representatives (DRs). If we were to lift the cover on the DRs, we would surely see a much more advanced transition and a representation firmly entrenched in institutional libraries.

As much as ICPSR has welcomed its new constituency, the Consortium is still learning more about librarians' needs. Already the Webinar series contributes to data literacy among end users and on behalf of the new OR, but there's more to be done. ICPSR has an opportunity to bridge and encourage the essential working relationships between research/teaching faculty members and academic librarians. 2006 Sabbatical Fellow Lori Weber noted the "important connection that ICPSR facilitates between librarians and social scientists." She speaks to a moment in which teaching and research faculty can recognize the social nature of what we do and the rich contribution embedded in our partnership with the library, writ large.

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