

April 11-12, 2024 Council Meeting Minutes

Attendees:

Council Members (In-Person): David Armstrong, Courtney Bell, Jon Cawthorne, Susan Frazier-Kouassi, Sandra Marquart-Pyatt, Jeff Morenoff, Gisela Sin, Janet Stamatel, Michael Steeleworthy, and Esther Wilder

Council Members Remote: Michael Cafarella

Council Members Absent: Randall Akee and Claire Bowen

ICPSR Staff (In-Person): Trent Alexander, JD Alford, Ambyr Amen-Ra, Katherine Baisden, Megan Chenoweth, Alina Conn, Linda Detterman, Aalap Doshi, Robert Franzese, Robert Gessner, Jeannette Jackson, Joy Jang, Jeff Jones, John Kubale, Kathryn Lavender, John Lemmer, Maggie Levenstein, Jared Lyle, John Marcotte, Trisha Kunst Martinez, Michelle Overholser, Holly Neilson, Darleen Poisson, Fillippo Stargell, Sandra Tang, Rujuta Umarji, and Candice Wilson

ICPSR Staff Remote: Anna Beaubien, Zachary Bennett, David Bleckley, Jon Brode, Sara Burchart, Stephanie Carpenter, Rebekah Chu, Lara Cooper, Evan Cosby, Dale Couey, Dominic DiFranco, Kelly Doonan-Reed, Amanda Draft, Julie Eady, Greg Farris, Wendi Fornoff, Chelsea Goforth, Nishit Gopani, Bill Horvath, Hassan Hodges, Samuel Imbody, Meghan Jacobs, Matthew Johnston, Euijin Jung, Kevin Kapalla, Piotr Krzystek, Kathryn Lavender, Jenny Li, Scott Liening, Andrew Mossaad, A.J. Million, Bianca Monzon, Erin Meyer, James McNally, Elizabeth Moss, Nehemiah Naidu, Amy Pienta, Katey Pillars, Dan Pritts, Shannon Reidy, Sarah Rush, Chelsea Sample-Steele, Joseph Saul, Michael Shallcross, Bing She, Elizabeth Shook, Kyrani Simon, Alison Sweet, Sharvetta Sylvester, Alex Toma, Lia Trapaidze, David Thomas, Wendy Umbriac, Melissa Wlodkowski, Jennifer Zeiger, Sandy Zalmout, and LingLing Zhang

Approval of Minutes

Gisela Sin, 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. Gisela motioned to have the minutes approved. Minutes were approved unanimously.

Director's Report

Margaret Levenstein delivered the Director's Report, acknowledging the presence of attendees and welcoming new council members. She reflected on the past six months at ISR, emphasizing a sense of continuous progress. Levenstein noted the ongoing engagement in existing projects

Council Minutes April 2024

rather than the initiation of new ones. She highlighted efforts to ensure the effectiveness and value of these endeavors for users, encompassing data collection and organizational developments. Levenstein acknowledged the challenge of summarizing the extensive activities of ISR and expressed appreciation for the comprehensive reports detailing the organization's multifaceted work.

The Director highlighted a significant event at ICPSR and ISR, celebrating Trent Alexander's appointment as the Jerome M. Clubb Collegiate Research Professor. Alexander delivered an inspiring presentation aligning his work with ICPSR's mission and history, leaving attendees motivated. While the lecture recording isn't publicly available, access may be granted upon request. Additionally, Jerome Clubb's daughter attended the celebration, representing her father, who served as ICPSR director from 1975 to 1991. Clubb advocated for quantitative history, contributing to the organization's evolution, including the name change from ICPR to ICPSR, albeit with mixed sentiment towards the resulting acronym.

ICPSR has experienced significant growth in staff over the past five years, expanding from under 100 to about 180 employees. Currently, five new staff members have recently joined ICPSR, marking a continued period of growth and change though thankfully at a somewhat slower pace than in the last two years.

Over the past five years, the Summer Program at ICPSR has undergone multiple reinventions as a result of the COVID-19 pandemic and its aftermath, transitioning first to fully remote and for the last two year to a hybrid format. The hybrid format allows us to maintain the benefits of both remote and in-person options. This year, the program remains hybrid, offering on-campus housing for participants to foster community and ease short stays. The schedule has evolved from a traditional four-week format to a "3 + 1" structure, with new additions like a data science short course co-sponsored with the Michigan Institute for Data Science. Despite innovations, the focus remains on core offerings. With approximately 500 registrations to date, scholarships play a crucial role, including those funded by the membership, ISR, Rackham, and the University of Michigan. These support scholars from various regions such as the Middle East, North Africa, Ukraine, and beyond. Increased support from organizations like ISR and the Weiser Center enhances accessibility, while additional scholarship programs further aid participation. Overall, the emphasis is on facilitating access and encouraging participation in the program's diverse offerings.

There have not been any major additions recently to ICPSR's sponsored topical archives. The National Addiction & HIV Data Archive Program (NAHDAP) just secured renewed funding in a narrow timeframe between the passage of the NIH budget by Congress and the expiration of needed funding. This renewal underscores the significance of NAHDAP's work and the support it receives. The Social Media Archive (SOMAR) continues to expand. Notably, its impact extends globally by providing platform data from Facebook and other major platforms, aiding compliance with regulations like the European Union's Digital Services Act and facilitating research for academic and non-academic entities worldwide. ICPSR's aging archive, NACDA, is

Council Minutes April 2024

utilizing the DDI Lifecycle metadata standard. DDI's home is here at ICPSR and Jared Lyle serves as its executive director. DDI Lifecycle supports longitudinal and geospatially-linked data.

NACDA has been advocating for its use, collaborating with others, and working with Colectica to use Colectica's software tools. These efforts exemplify ICPSR's work in advancing archival practices and standards.

ICPSR has reorganized the membership archive, establishing the Consortium Archive Team (CAT), led by Trent Alexander, Linda Detterman, and Amy Pienta. This team aims to streamline data acquisition, curation, and sharing processes for the membership archive. Distinct collections for social science, education, health, and minority data are being developed, with leaders assigned to each. CAT is also responsible for Open ICPSR, focusing on self-published data for replication and transparency, with high-value datasets curated and incorporated into subject matter collections. This reorganization process involves collaboration across various teams and informs technological advancements, including the implementation of single stream input for data integration.

Data Jeff has recently adopted a cat, prompting an inclusive process to name this valued pet. The finalists for the cat's name are "Byte," "Catalog," "Data Byte," and "Tabby." Council members will have the opportunity to vote on the final name; absentee ballots may be necessary for those unable to attend. While there are also dog lovers within ICPSR, this decision pertains specifically to Data Jeff's cat.

Over the past six months, ICPSR has made significant advancements in technology, launching three major initiatives in January and early February. These include Researcher Passport version two, Turbocurator, and Research Data.Gov version three. Researcher Passport, a digital credential for data users, aims to be interoperable with other platforms. We have already issued around 45,000 passports since its launch. This credential is now used to authenticate users for most ICPSR applications, replacing the previous MyData accounts. The high number of passport issuances, though unexpected, reflects its adoption and ease of use. Additionally, further technological developments are planned to utilize Researcher Passport for authorizing access to restricted data and various resources beyond ICPSR.

Turbo Curator, developed for use by DataVerse, has seen active use with over 1000 views thus far. Although not yet utilized at ICPSR, the decision to debut it at DataVerse stems from DataVerse's need for metadata enhancement, a service ICPSR already provides. This move aligns with ICPSR's goal of aiding global research data efforts. Furthermore, by ensuring compatibility with other platforms, ICPSR aims for broader interoperability. Turbocurator's integration into ICPSR's single stream ingest process is envisioned for the future. It leverages AI, including ChatGPT, and ICPSR Thesaurus for metadata improvement recommendations, demonstrating a judicious application of AI technology.

Vote: Data Jeff's cat's name is Catalog

Action Items/Next Steps: None at this time

Director's Report Slides

Council Minutes April 2024

Budget and Finance Committee Report

Jon Cawthorne, chair of the budget committee, presented the budget committee report. He thanked the council and highlighted the extensive efforts put into this year's budget. He emphasized the committee's admiration for the work done by ICPSR but stated that they recommend not supporting the current budget. This recommendation is not an indication of financial trouble but a step in a necessary process. He then handed the meeting over to Gisela for further discussion.

Concerns were raised about the lack of oversight, accountability, and detailed information on the portion of the budget that goes to ISR. There was mention of a new tax included in ISR's budget, which lacked clarity regarding its necessity and benefit to ICPSR members. Council members expressed uncertainty about whether this tax was a one-time or recurring expense. The council decided that without further clarification and assurance from ISR, approving the budget would be irresponsible.

Note: Gisela Sin requested a motion to vote on the 2025 budget. Esther Wilder made the motion and Mike Steeleworthy seconded the motion to put the budget vote. No further discussion was requested. Council members unanimously voted against the 2025 budget.

Action Items/Next Steps: Seek clarification of what the purpose is of the ISR Director's Tax that was included in ISR's calculation of the Provost tax and what it entails in future years. A revised budget should be submitted to Council before the start of the new fiscal year on July 1, 2024.

Slides: None

Membership, Acquisitions, and User Support

Esther Wilder presented the Membership, Acquisitions, and User Support Committee report highlighting ICPSR's efforts to increase data deposits to the new Consortium Archive. They have engaged in outreach activities such as posters, professional meetings, social media, and webinars to encourage data deposits and support ICPSR users. Esther discussed the Consortium Archives Teams (CAT) and their relevance to the acquisitions process. CAT replaces the former general archive to enhance acquisition activities. The senior leadership includes Trent Alexander, Allyson Flaster, Lynette Hoelter, and Amy Pienta with specific leaders for social science, education, and health activities. CAT staff, including project managers, curate data from various sources, including minimally processed ICPSR studies, making them more suitable for ICPSR. Lynette was also given an opportunity to provide additional insights from CAT members.

Lynette elaborated on the additional efforts of the Consortium Archives Teams (CAT), emphasizing activities not previously focused on by the general archive.

Esther highlighted key points about Acquisitions, focusing on new NIH guidelines for data sharing. A workshop related to these new policies will be held this summer, aimed at University of Michigan faculty. There was a discussion about extending this to faculty from other institutions who may have NIH grants. Additionally, a developer guide for sharing qualitative data was released after the last Council meeting in October 2023, and it has already seen significant downloads and engagement.

The Acquisitions staff has been active in engaging with research communities, including negotiating data transfers. Notable efforts include the transfer of the COVID-19 Trends and Impact Surveys (CTIS) and activities related to the [Detroit Metropolitan Area Community Studies](#). Overall, there has been significant activity to acquire diverse data sets for ICPSR.

Updates on user support have highlighted historical efforts in addressing formatting issues and handling user inquiries through email triage. Recently, they added a one-third FTE position focused on restricted data users. An important user support person is planning to retire, prompting planning for their replacement. Since the last council meeting in October 2022, they resolved 3,493 user support tickets by February 2023, indicating significant ongoing support efforts.

Goals for user support include updating user support manager roles and responsibilities, improving existing documentation, and creating new documentation. The researcher passport process, an important development, had a major update on January 29, 2024.

A video explains that the researcher passport acts like a regular password for seamless data access and control, integrating with Gmail and other applications. While there were initial issues with proxy servers blocking some users, these problems have been resolved, bringing support tickets back to regular levels.

During the meeting, proposed changes to membership fees for FY2026 beginning July 1, 2025 were discussed. At the time of membership fee analysis, the Employment Cost Index was running at 4.2% and the CPI at 3.1%. ICPSR staff recommended an increase closer to the CPI for smaller institutions and to the Employment Cost Index for R1s. ICPSR staff analyzed various fee increase options, and combined with ongoing feedback from member institutions, recommended a fee increase of 4.6% across Research Extensive Highest academic institutions and a 3.5% increase for all other institutions. The proposed structure aims to ensure the fee structure is equitable and manageable for all member institutions based on their usage of on-demand data, restricted-use data services, and quantitative methods training.

Vote: Gisela Sin requested the Council to vote on the FY 2026 Membership Rate Card. Esther Wilder so moved; Susan Kouassi-Frazier seconded. Council unanimously voted to approve the FY 2026 Membership Rate Card.

Action Items/Next Steps: None

Membership, Acquisitions, and User Support Slides

Summer Program Committee Report

The Summer Program Committee Report was presented by Gisela Sin. The ICPSR Summer Program aims to provide training and instruction on research methods and data management to the research community. The program is organized by a group led by Robert Franzese, with key roles filled by Stephanie Carpenter (Program Manager), Sandy Zalmout (Support Team), Laura Zimmerman (Administrative Assistant), and a new staff member, Lia Trapaidze (Administrative Assistant).

For the 2023 Summer Program, there were two 3-week general sessions and one 1-week interim session, with 96 offerings. The days were long due to the condensed format, which was challenging for both staff and participants. Housing was offered through the University of Michigan for the first time, although it was less utilized than anticipated. Adjustments were made for 2024 based on this experience. Registration returned to pre-pandemic levels, with a 50% increase in in-person attendance during the general sessions, marking a successful transition back from the pandemic's online-only format. The return to in-person sessions facilitated valuable connections and networking among students and faculty, contributing to the program's overall success.

For 2024, the ICPSR Summer Program will revert to four-week general sessions and continue with a hybrid format. The first week will consist of four hours of math and computing classes in the morning and afternoon. Weeks two to four will feature methods courses for three hours each in the morning and afternoon, allowing time for homework and socializing. A round-robin session will be held on the first Monday of the second week to introduce all classes, helping students select classes and adjust their schedules.

The program will offer over 100 classes, including 32 methods classes, 11 math and computing classes, and 50 topical workshops. Most of the topical workshops will be online only. A new partnership with the Michigan Institute for Data Science will introduce the Social Data Science Summer Academy, a one-week program in August. The workshop will be heavily subsidized (by MIDAS) for University of Michigan faculty and graduate students.

Improvements include an upgraded registration portal that consolidates all information and searches for workshops and classes. Approximately 170 scholarships will be available, with

around 40% dedicated to diversity fellowships. The Ukrainian fellowships have increased by 20% for 2024. The application window for fellowships has been extended by three weeks post-registration opening.

As of now, 2024 registration levels are similar to 2023. The program aims to increase in-person attendance and continue improving its financial balance. Overall, the program is on track for a successful year with a few challenges to address, particularly increasing in-person participation and maintaining financial stability.

Robert Franzese discussed the relocation of the Summer Program headquarters from Helen Newberry to the ISR Thompson building. Previously, the program staff used Helen Newberry during the summer, costing \$100,000 annually. However, due to minimal actual usage, they decided to exit the contract. The new headquarters at ISR Thompson will be more cost-effective and will feature flags and decorations to enhance the atmosphere. Franzese noted that the new location should meet the needs of faculty and staff better than Helen Newberry.

Franzese provided context for the Summer Program's financial details: while the revenue figure was reported as \$1.8 million, the actual figure is \$1.9 million when accounting for scholarships, including \$100,000 from ICPSR and another \$60,000 for diversity scholarships. Lastly, Franzese mentioned potential changes to registration fees, suggesting that the current pricing structure may not be optimal. He highlighted the disparity between the costs for 20-hour and 40-hour workshops and indicated that adjustments might be needed in the future.

Action Items/Next Steps: None
Summer Program Slides

Technology and Standards Committee Report

Mike Steeleworthy presented the ICPSR Technology and Standards Committee Report to the Council, which includes four units: Curation, Metadata & Preservation, Computing and Network Services (CNS), and Product Management/UX. The report covered each unit's achievements, challenges, and goals, focusing on themes of communication, change resilience, and achievement.

The **Curation Unit** is responsible for the preparation of social science data collections from sponsored and member-funded projects for permanent archiving and dissemination. Their achievements have been the development of revised curation workflows and roles, reducing effort and time for all levels of curation since 2022. Curation activities include disclosure risk reviews, organizing study documents, composing robust metadata, and preparing data for analysis. Internally, the unit has addressed improved retention and morale initiatives, including revised role descriptions for two positions. The Curation Unit's challenges are balancing non-

standard workflows with standardization while maintaining data quality. Retention has been an issue, with two departures since October 2023. Another challenge is implementing curation standard process changes without technology upgrades. The Curation Unit's goals are to improve retention and morale, develop new career paths and promotions, integrate career training and development, and document non-standard workflows with other units to understand and operationalize them.

The **Metadata and Preservation** unit develops and maintains standards for consistent metadata, policies for preserving digital assets, and extending a bibliography linking ICPSR data to over 112,000 analytical works. Their achievements are that they submitted an application for recertification by [Core Trust Seal](#); development of [ICPSR Metadata Portal](#) (public metadata resource); ongoing development work, such as the RDE Metadata Schema and the new metadata export API daily operations, including: Bibliography: 3800+ new citations discovered and Metadata for new studies: 200+ final metadata approval for new/updated studies. One challenge the unit has faced is identifying when Metadata and Preservation input is required for product development., e.g., for bulk editing tools to facilitate editing and revising legacy metadata. The Metadata and Preservation unit's goals are to complete development of Metadata Export API for Discovery & Access; enhance documentation for the Metadata Documentation Portal; finalize and implement the DDI Alliance 2024-27 Strategic Plan; approve and implement the ICPSR Policy on Harmful Language; and support metadata requirements within the Research Data Ecosystem (RDE).

The **Computing and Network Services (CNS)** supports computer software development and system security needs. Their achievements have been that several new releases including the Researcher Passport (authentication and identity management), Turbocurator for the Harvard Dataverse, and new features to ResearchDataGov. Collaboration and background work that facilitates data curation, security and access, and discovery. Other projects big and small that do not get the spotlight - Quality Assurance/Quality Check improvements, project management. CNS is standardizing product release cycles. Balancing technical debt with desire for new projects. Reinforcing communication lines that connect technical decisions with business goals and outcomes. CNS's goals are meaningful 12-week release cycles, Quality Assurance/Quality Check and Project Management commitments.

The **Product Management and User Experience (UX)** Unit is a new ICPSR unit focusing on product management and user experience. It is a reorganization of existing teams that had been in CNS and Membership & Communication. This unit aims to provide a user-centered design, ensuring privacy, and developing modern, accessible front-end interfaces. Their achievements include Product Releases (e.g., Turbocurator, ResearcherPassport, RDG enhancements). New unit, leadership team, and roles. Product Lead role and MARs established, onboarded. Design Lead role and MARs established, onboarded. Product team reorganization (i.e., coalescing 4 teams, resourcing, and prioritization). The Product Management and User Experience (UX) unit's challenges include that it is a new unit on "Development and Maturation." Design velocity

(i.e., “we take longer than we think” [with good reasons]). Their goals are piloting new study homepages by early summer; implementing improved development velocity with 6-week cycles and enhanced scope management; continuing development of resource management systems and practices; and balancing UX and Tech Sustainability. They aim to improve user experience without creating unsustainable technical debt, which can lead to long-term capital and operating costs for ICPSR. Improve development velocity with six-week cycles and enhanced scope management. Enhance scope management to improve target setting and threshold management. Support continued development on resource management systems.

Action Items/Next Steps: None
Technology and Standards Slides

Adjournment

The meeting was adjourned April 12, 2024 at 1:00 p.m.
Next Council meeting will be October 3-4, 2024.

Reports to Council
April 2024 Council Meeting
Pgs 22 - 45

ICPSR Council April 11, 2024



ICPSR

1

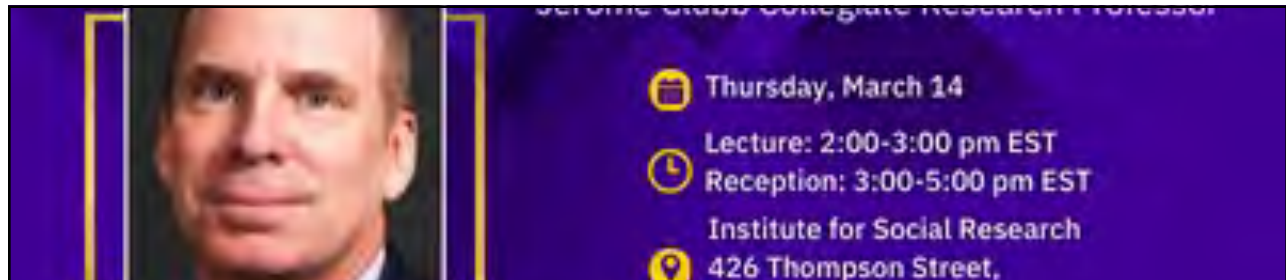
**Steady as she goes
... but she goes
quickly**



Over the last six months we have been doing a lot, but basically staying the course
Fewer brand new people and projects

ICPSR

2



Jerome M. Clubb Collegiate Research Professor

- Thursday, March 14
- Lecture: 2:00-3:00 pm EST
- Reception: 3:00-5:00 pm EST
- Institute for Social Research
- 426 Thompson Street,

We did have a celebration!


J. Trent Alexander, Jerome M. Clubb Collegiate Research Professor

ICPSR

3

Jerome M. Clubb

- ICPSR Director, 1975 – 1991
- Quantitative history allows us to understand the lives of everyone, not just “great men”
- Commitment to interdisciplinarity
 - Added the “S” to ICPSR



ICPSR

4

4

Steady as she goes ... but she goes quickly

Over the last six months

Employment overall has been fairly stable

Five new people



Laura Zimmerman
Administrative Assistant



Lia Trapaidze
Administrative Assistant



Katherine Baisden
Data Project Manager



Perice Pope
Research Data Engineer



Shanelle Boluyt
Business Systems Analyst Senior

ICPSR

5

5

Steady as she goes ... but she goes quickly

Over the last six months

Summer Program

Hybrid, on-campus housing
again

Tinkering with 3-4 week
schedule

ICPSR

6

Summer Program 2024

**ICPSR
SUMMER
PROGRAM**
IN QUANTITATIVE METHODS



ICPSR

Over 100 Courses, Lectures, and Workshops:

Topical Workshops May 13-Aug 16

* New: ICPSR-MIDAS Social Data Science Summer Academy

General Sessions Jun 10-July 5 and July 8-Aug 2

On-campus housing & dining

~500 registrations so far, on pace to meet last year's enrollment

54 ICPSR scholarships, 38 Diversity Scholars, 60 Rackham (UM) scholars, 4 MENA scholars

Ukraine awards still to come

7

7

Steady as she goes
... but she goes
quickly

Over the last six months

No big new archive projects

NAHDAP was renewed, just under the wire!

SOMAR is growing and having global impact

NACDA is leading in using DDI Lifecycle for longitudinal data

Reorganization of Membership archives into the Consortium Archive Team

ICPSR

8

Consortium Archive Team (CAT)



ICPSR

- Unifies Acquisitions Team and General Archive
- Goals: acquire, curate, and share valuable data
- Core customer and funder: ICPSR Membership
- Social Science
- Education
- Health
- Resource Center for Minority Data
- OpenICPSR
 - Self-publishing archive for ICPSR members to share and preserve data for replication & transparency
 - Data with high value for secondary analysis will be curated and included in subject matter collection

9

9

Data Jeff's Cat Needs a Name



ICPSR

- Byte
- Catalog
- DataByte
- Tabby

10

10

Steady as she goes ... but she goes quickly

- Over the last six months
 - Technology launches
 - Researcher Passport, version 2
 - TurboCurator, version 1
 - Research Data Gov, version 3

ICPSR

11

11

RESEARCHER PASSPORT

by ICPSR

- New digital credential for ICPSR
 - Will replace MyData accounts
- Launched January 23, 2024
- Over 45,000 passports issued



ICPSR

12

12

TurboCurator

- Researchers depositing data at Dataverse can use TurboCurator by ICPSR to enhance metadata & generate meaningful
 - Titles
 - Descriptions
 - Keywords
- Relies on the Open AI's ChatGPT & ICPSR best practices
- Shared with Dataverse community February 12



Steady as she goes ... but she goes quickly

- Six months ago I told you that the U-M internet outage exposed the extent of our technical debt
 - RDE development process has reinforced that lesson
- Focus of year 3 is on building the underlying platform and shared modules that will help to retire some of that debt and provide better foundation for the future

IT goals for 2024



Study Home Page



Single Stream Ingest

Single deposit form
New metadata editor



Content Management System



Design System



Technology housekeeping

VDE manage
Search infrastructure
Usage statistics and reporting

ICPSR Funding Sources

	FY2024 Budget	FY2024 Projection
Membership Revenues	4,532,000	4,701,281
Summer Program	2,000,000	1,801,014
IDC & CNS Recharge	8,435,396	8,066,396
UM/ISR Funding	326,055	326,055
Total Non-sponsored Revenue	15,313,451	15,012,806

Additional
~\$12M in
sponsored
direct
revenue

ICPSR Spending

	FY2024 Budget	FY2024 Projection
Salaries	10,049,815	9,445,416
Non-salaries	2,810,153	3,001,769
ISR (building fund & I/O split)	1,687,712	1,687,712
Provost taxes	599,703	599,703
Total Non-sponsored Expenses	15,147,383	14,734,600

Additional
~\$12M in
sponsored
direct
spending

ICPSR

17

17

ICPSR Spending

	FY2024 Budget	FY2024 Projection
Salaries	10,049,815	9,445,416
Non-salaries	2,810,153	3,001,769
ISR (building fund & I/O split)	1,687,712	1,687,712
Provost taxes	599,703	599,703
Total Non-sponsored Expenses	15,147,383	14,734,600

We expect ICPSR to end the fiscal year with a small surplus rather than the deficit in the approved budget. Running a surplus for the next three years is critical to managing the transition when RDE ends. It was possible this year because we were frugal and reduced our non-sponsored spending.

ICPSR

18

18



You're invited!
MICHIGAN, UCLA, & WISCONSIN

2024 PAA RECEPTION

Thursday, April 18th
6:30 PM to 8:30 PM
Hyatt Regency Columbus, McKinley Room
350 N High St, Columbus, OH

Refreshments will be served!
Please RSVP via the QR code:



M INSTITUTE FOR SOCIAL RESEARCH
UNIVERSITY OF MICHIGAN

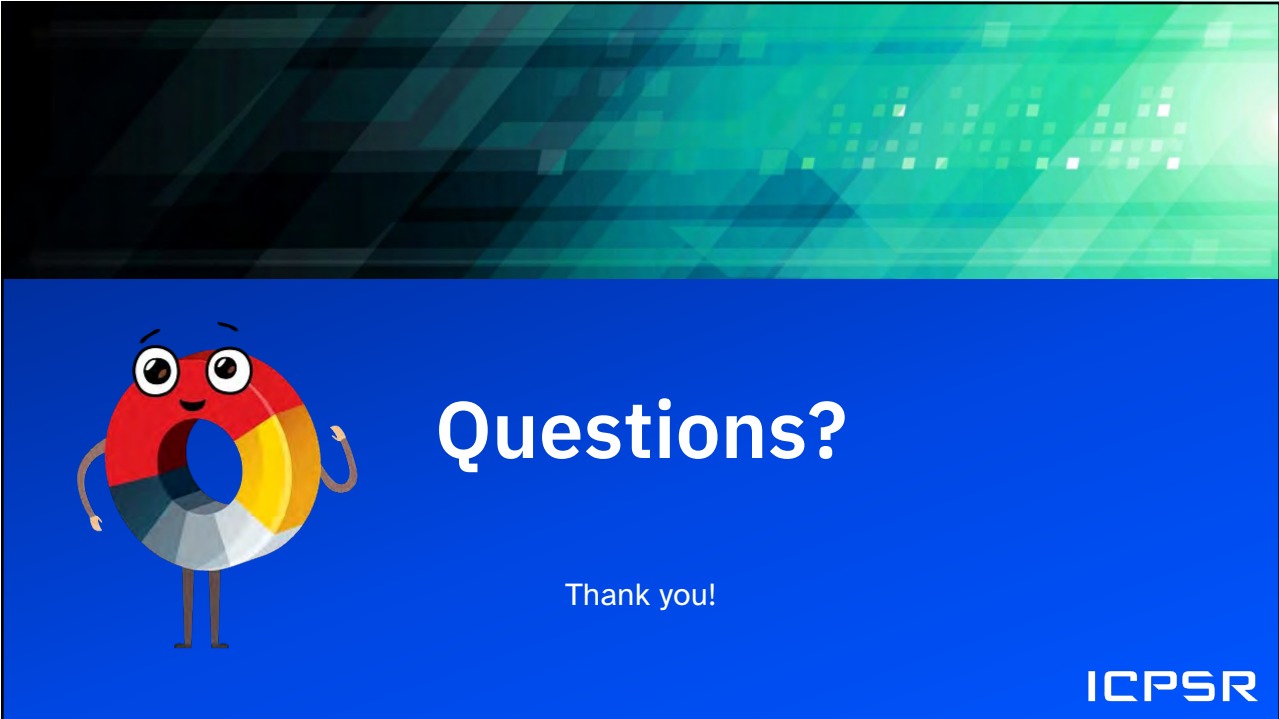
UCLA College of Social Sciences
California Center for
Population Research

W Center for
Demography and Ecology
UNIVERSITY OF WISCONSIN-MADISON

W Center for Demography
of Health and Aging
UNIVERSITY OF WISCONSIN-MADISON

ICPSR

19




Questions?

Thank you!

ICPSR

20



Membership/Acquisitions/User Support Committee Meeting Summary

Council: Courtney Bell, Janet Stamatel, Esther Wilder
ICPSR Staff: Linda Detterman, Kyrani Reneau, Amy Pienta, Ambyr Amen-Ra, Allyson
Flaster, Dory Knight-Ingram, Sandy Zalmout, Lynette Hoelter

1



Role of Acquisitions Highlights



- ICPSR strives to encourage data to be deposited into ICPSR.



Source: [Outreach - Covenant Cares](#)

- Outreach includes talking to depositors at professional meetings and connecting from recommendations from internal folks, user support, social media, and others.
- Webinars related to deposits/sharing are also conducted.

2

Consortium Archives Team (CAT) Highlights



- **CAT [Input for Lynette and Amy]**
 - Brings together Acquisitions and General Archive
 - Replaces the former General Archive with the goal of strengthening the value of acquisition activities for the ICPSR membership and broadening leadership involvement
 - The senior leadership of CAT includes Trent Alexander, Amy Pienta, Linda Detterman. Lynette Hoelter leads the social science activities, Allyson Flaster leads the education activities, and Amy Pienta leads the health activities. Kyrani Reneau and Anya are project managers.
 - CAT data are data that are curated and shared across the membership of ICPSR. To begin, CAT staff is selecting studies for curation or dataset improvement from the following sources:
 - (1) moving openICPSR studies to CAT,
 - (2) curating studies that were Fast-Released (processed minimally),
 - (3) updating old format studies to be more usable.

3

Acquisitions Highlights



Source: [Acquisition traffic sign stock photo. Image of financing - 215726168 \(dreamstime.com\)](#)

- 2024 workshop for NIH researchers related to new data sharing policies/requirements ([2023 NIH Data Management and Sharing Policy | NIH Office of Intramural Research](#)) will be held as part of Summer Program
 - Geared toward UM folks but materials can be reused
 - Staff is considering possibility of parallel workshops for faculty from other campuses who may not be NIH-funded
- Guide for sharing qualitative data released after the last Council meeting in October was written by acquisitions staff and garnered 250+ downloads
- Engaging with research communities (examples) for data:
 - Resource Center for Minority Data (RCMD) talking with anti-defamation league (deposit in process); negotiations with Meta (Facebook) to transfer Covid Trends and Impacts survey; pursuing Detroit Metropolitan Area Community Studies (DMACS), one of the largest surveys of Black Americans – likely to be member-funded; Helping to End Addiction Long-term (HEAL – projects about opioid data) conversations initiative just endorsed Consortium Health Archive.

4

User Support Updates

- Historically, an email to ICPSR-help travels to a single staff person, then gets triaged to sponsored archives as well as other areas within ICPSR;
 - added ⅓ of another FTE who will focus heavily on restricted data user support.
 - A retirement of an extremely knowledgeable support person is coming and staff are working with supervisors to figure out what the transition plan will look like.
- Resolved 3,493 user support tickets (including 202 resolved OpenICPSR user support tickets) through February 28, 2023.
- Upcoming goals:
 - Update User Support Manager roles and responsibilities
 - Continue updating current documentation
 - Create new documentation for tasks that may not have documentation



Image source: Lemon Learning. [The role of user support in DAPs \(lemonlearning.com\)](https://www.lemonlearning.com/blog/the-role-of-user-support-in-daps)

5

Authentication (Researcher Passport) updates

- ICPSR released new authentication system on Jan 29, 2024
 - Video explains Researcher Passport: [ICPSR 101: What is the ICPSR Researcher Passport? \(youtube.com\)](https://www.youtube.com/watch?v=...)
- As described in ICPSR 101, Researcher Passport is “a digital identity or profile that captures and verifies the things about you that repositories need to know in order to share their restricted data with you.”
- Update was to the basic login functionality to put ICPSR in a position for a more seamless experience for applicants of restricted use data;
 - also a step to get ICPSR out of password management by using InCommon, gmail, and other authentication applications.
- Launch required rigorous user support as InCommon and proxy servers do not have standard configurations and blocked several users; however, user support tickets are now at regular levels and data are flowing, both signs of implementation success.

**RESEARCHER
PASSPORT** ✓
by ICPSR

6

Membership & Communications

- **ICPSR Member Institutions - Segmentation Orientation**
- ICPSR's member/fee structure is organized with 2015 Carnegie classifications along with some aspects of 2000 classifications (Carnegie is releasing a new version in 2024; ICPSR will determine how to integrate the new classifications). "Associate" classifications include think-tanks, research organizations, and international institutions (most are Associate IV).
 - Staff noted a high correlation between Carnegie class and data use such that use of this publicly available classification will continue to take place.
- About 400 US academic institutions are members with 800+ members overall. More details on segments are in your Council binder (pp. 11-12).
- MSIs/[HBCUs](#): Encouraged Council to look at link for ICPSR's ongoing HBCU recruitment strategy.
 - Staff noted the key to continued membership in ICPSR on every campus is a data advocate on campus.



7

Membership & Communications



Delivering Data Services Course Progress

- "Three amigos" course – offered every other year as part of the Summer Program. Current instructors are ready to turn it over to the next generation.
 - Developed in 1990 by James A. Jacob, Chuck Humphries, and Diane Geraci (the "three data amigos")
- Stephanie LaBou is spearheading the update of the course (content, delivery) with three amigos' consult. The rework also includes questions on when to hold the course and even future biennial meetings.
- Future Biennial Meetings: Does Council believe it would be better/worse/same in terms of boosting in-person attendance, i.e., moving the meeting to April during the April Council (Spring) vs. the October Council (Fall)
 - Keep in mind we will be doing research with ORs/DRs

8

Membership & Communications FY2026 Pricing Recommendations (requires vote by Council)



Image Source: [\(5\) 7 Reasons to Increase Your Fees | LinkedIn](#)

- See pages 11-12, and 122 to 125 of report [Reflections from Linda on how we arrived at pricing structure]
- FY24, collected \$4.7m
- Expecting similar in FY25 (4.3% increase in fees).
- Uncertain that ICPSR can weather an overall 4% increase in FY26, based on feedback, especially small schools.
- Note that FY2026 rates must be published on the ICPSR website no later than June 30, 2024.

Committee Recommendation to the Full Council: The Committee recommends the proposed 4.6% for Research Extensives and 3.5% for others for FY2026 (the membership period running July 1, 2025 through June 30, 2026).

Summer Program Committee Report

ICPSR Council Meeting
April 11, 2024

2023 Program Review

- Two 3-week *General Sessions* with 1-week Intercession
 - 96 distinct classes
 - 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.
- Attendance
 - Return to pre-pandemic levels of registration (993 participants/1131 Workshops or sessions)
 - 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

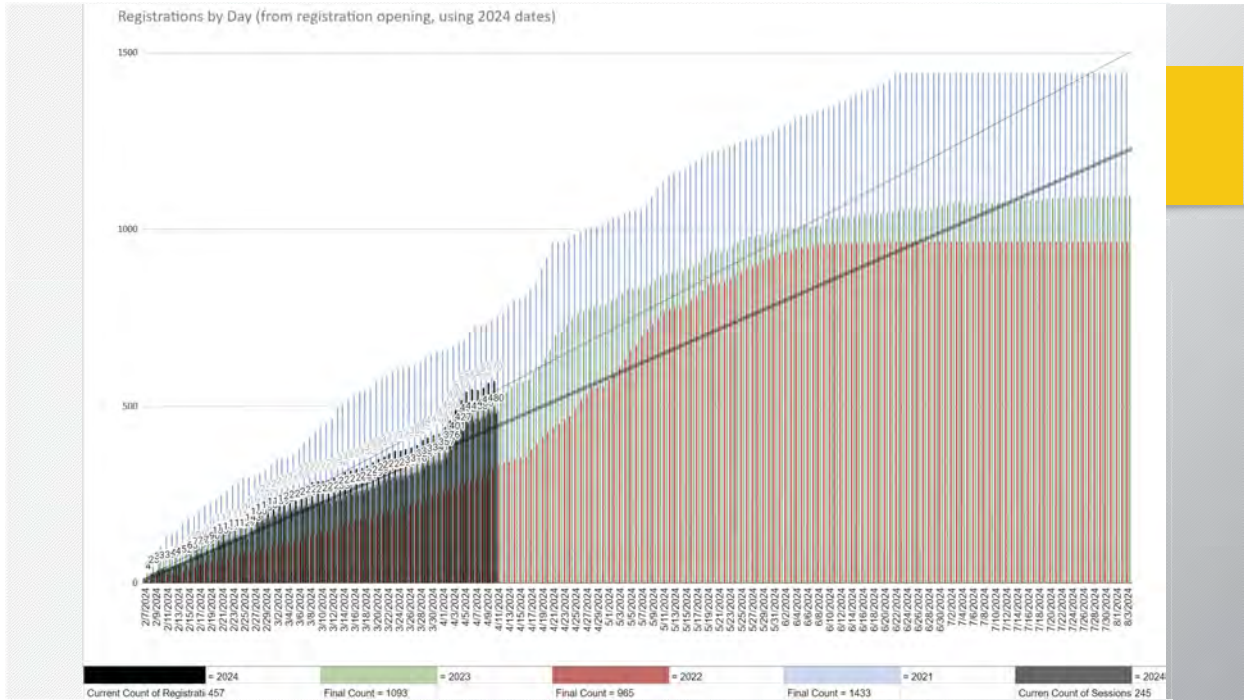
- 4-week General Sessions
 - **Week 1: 4-hour AM & PM blocks for Math and Computing lectures (hybrid)**
 - **Weeks 2-4: Methods courses in 3-hour AM & PM blocks**
 - **First Monday: round robin 10-minute Intro to all courses**
- Inter-session Week: hybrid
- Over 100 classes {32 methods, 11 math & computing, 50 topical workshops}
- NEW: ICPSR-MIDAS Social Data Science Summer Academy

- Registration Portal Upgraded!!!!

Planning for 2024

- Scholarships: Similar to 2023
 - Ukrainian fellowships increased by 20%
- Innovation: application window extends 3 weeks after registration opens

- Registration fees and Instructor Compensation constant for 2024



Conclusions

- Summer Program returns to form in 2023.
- Challenges remain for 2024:
 - Rebuild and reinvigorate the in-person experience
 - Improve the fiscal balance of the Summer Program ,

ICPSR Technology & Standards Committee Report Spring 2024

Attendees: Michael Cafarella, Michael Steeleworthy
Trent Alexander, Aalap Doshi, Jared Lyle, Trisha Martinez,
Rujuta Umarji, Candice Wilson

1

Outline and Background

Key Achievements, Challenges, and Goals for each of the four teams:

- **Curation** - responsible for the preparation of social science data collections from sponsored and member-funded projects for permanent archiving and dissemination.
- **ProdUX** - delivers a comprehensive product suite that advances social and behavioral research.
- **Metadata & Preservation** - develops and maintains standards for consistent metadata, policies for preserving digital assets, and extending a bibliography linking ICPSR data to over 112,000 analytical works.
- **Computing and Network Services (CNS)** - serves ICPSR's computing, software development, and systems security needs.

2

The slide features a dark blue background on the left with a lighter blue circular graphic. The text 'Curation Key Achievements' is centered in the lighter blue area.

Curation *Key Achievements*

- Enhanced integration of Fast Release with updated documentation.
- Revised curation workflows and roles, reduced effort and calendar time.
- Initiatives to boost retention and morale including promotions and updated role descriptions.
- Ongoing reorganization of Google Drive.
- Implementation of staff morale and engagement survey.

3

The slide features a dark blue background on the left with a lighter blue circular graphic. The text 'Curation Challenges' is centered in the lighter blue area.

Curation *Challenges*

- Balancing non-standardized workflows (inefficiencies) with ongoing standardization efforts while ensuring the maintenance of data quality for unique products
- Forecasting hiring needs is hard, gained support from an intern this year.

4



Curation *Goals*

- Unit Cohesion & Retention (ongoing)
 - Developing new career path and promotion info
 - Integrating career path training and development
- Non-standard workflows - work with PuMUS and BCD to document non-standard workflows and their exceptions.

5



ProdUX *Key Achievements*

- Product Releases (e.g., TurboCurator, ResearcherPassport, RDG enhancements).
- New unit, leadership team, and roles.
 - Product Lead role and MARs established, onboarded
 - Design Lead role and MARs established, onboarded
 - Product team reorganization (i.e., coalescing 4 teams, resourcing and prioritization).

6



ProdUX
Challenges and Goals

Challenges

- New unit on “Development and Maturation”
- Design velocity (i.e., “we take longer than we think” [with good reasons])

Goals

- Operations:
 - Piloting new study homepages by early summer.
 - Implementing improved development velocity with 6-week cycles and enhanced scope management.
- Organization & Strategy:
 - Continuing development of resource management systems and practices.

7



Metadata &
Preservation
Key Achievements

- Submitted for Recertification of CoreTrustSeal (CTS).
- Development of [ICPSR Metadata Portal](#) (public metadata resource).
- Ongoing dev, such as RDE Metadata Schema and new metadata export API.
- Daily Ops:
 - Bibliography: 3800+ new citations discovered and indexed
 - Metadata: 200+ final metadata approval for new/updated studies

8

Metadata & Preservation *Challenges*

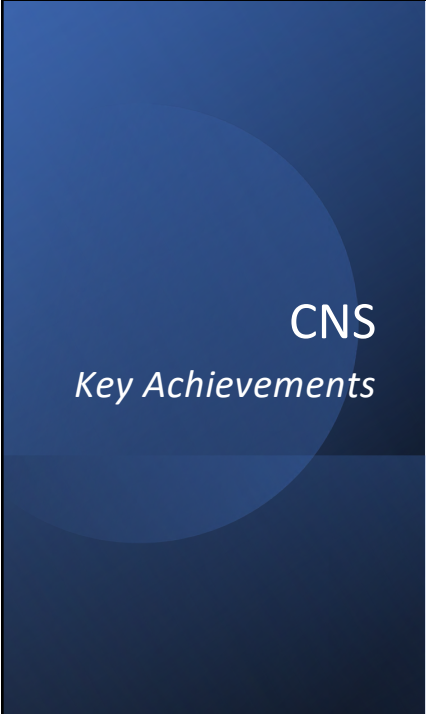
- Organization: Identifying when Metadata and Preservation input is required for product development.
- Technology: Requirement for bulk editing tools to facilitate editing and revising legacy metadata.

9

Metadata & Preservation *Goals*

- Complete development of Metadata Export API for Discovery & Access.
- Enhance documentation for the Metadata Documentation Portal.
- Finalize and implement the DDI Alliance 2024-27 Strategic Plan.
- Approve and implement the ICPSR Policy on Harmful Language.
- Enhance communication regarding Management and Product requirements within the Research and Development Environment (RDE).

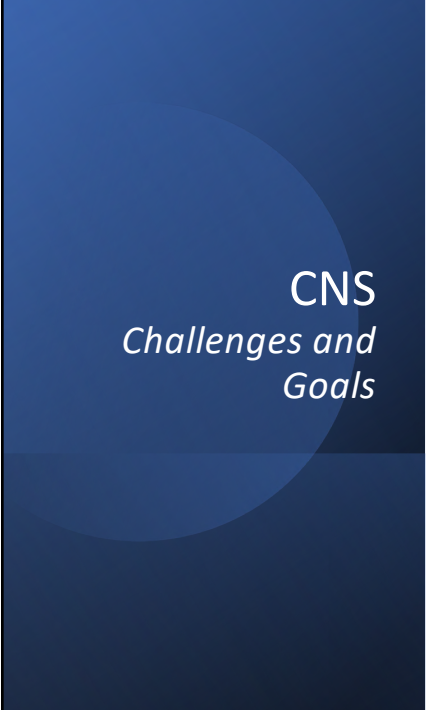
10

The graphic features a dark blue background with a lighter blue circular shape on the left. The text "CNS" is in a large, white, sans-serif font, and "Key Achievements" is in a smaller, white, italicized sans-serif font below it.

CNS
Key Achievements

- New releases include:
 - Researcher Passport (significant authentication and identity mgmt)
 - TurboCurator for the Harvard Dataverse, and new features to researchdata.gov
- Collaboration and background work that facilitates data curation, security and access, and discovery
- Other projects big and small that don't get the spotlight - Quality Assurance/Quality Check improvements, project management

11

The graphic features a dark blue background with a lighter blue circular shape on the left. The text "CNS" is in a large, white, sans-serif font, and "Challenges and Goals" is in a smaller, white, italicized sans-serif font below it.

CNS
Challenges and Goals

Challenges

- Standardizing product release cycles.
- Balancing technical debt with desire for new projects.
- Reinforcing communication lines that connect technical decisions with business goals and outcomes.

Goals

- Meaningful 12-week release cycles, Quality Assurance/Quality Check and Project Management commitments.

12