

## October 3-4, 2024 Council Minutes

**Council Members (In-Person):** Randall Akee, Courtney Bell, Claire Bowen, Jon Cawthorne, Susan Frazier-Kouassi, Sandra Marquart-Pyatt, Jeffrey Morenoff, Gisela Sin, Janet Stamatel, Michael Steeleworthy, and Esther Wilder

**Council Members Remote:** David Armstrong and Michael Cafarella

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

**ICPSR Staff Remote:** Annahita Akbarifard, Chinedu Amadi-Ndukwe, Emily Arents, Katherine Baisden, Annie Beaubien, Zachary Bennett, David Bleckley, Shanelle Boluyt, Sarah Burchart, Stephanie Carpenter, Megan Chenoweth, Swetha Chigurupati, Robert Choate, Rebekah Chu, Tessa Coleman, Gin Corden, Evan Cosby, Dom Coschino, Edward Czilli, Dominic DiFranco, Vasudha Doppalapudi, Aalap Doshi, Amanda Draft, Julie Eady, Wendi Fornoff, Aubrey Garman, Robert Gessner, Chelsea Goforth, Nishit Gopani, Marcell Hawkins, Hassan Hodges, Bill Horvath, Rachel Huang, Samuel Imbody, Meghan Jacobs, Euijin Jung, Veena Kannan, Kevin Kapalla, Jennifer Koski, John Kubale, Reyna Lee, Jenny Li, Scott Liening, Daphne Lin, James McNally, Vrinda Mahishi, Phillip Markee, Gary Mazzeo, Erin Meyer, Elizabeth Moss, Holly Neilson, Nadya Neuhaeusler, Justin Noble, Abigail O'Keefe, Michelle Overholser, Sarah Pearson, Katey Pillars, Darleen Poisson, Sarah Rush, Chelsea Samples-Steele, Joseph Saul, Mike Shallcross, Bing She, Elisabeth Shook, Mike Shove, Kyrani Simon, Alison Sweet, David Thomas, Alexandra Toma, Lia Trapaidze, Meg Valade, Sridhar Viswanathan, Melissa Wlodkowski, Sandy Zalmout, and Laura Zimmerman

### Approval of Minutes

Jon Cawthorne, acting 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. Jon motioned to have the minutes approved. Minutes were approved unanimously.

### Director's Report

Margaret Levenstein, Director of ICPSR, presented the Director's Report, focusing on recent developments and future plans at ICPSR since her last update in April 2024. She emphasized the importance of sustainability in finances, technology, membership, and data access as key themes.

Levenstein announced the 2024 Innovator of the Year award, given to Benjamin Dreyer, a senior curator, for their development of a configurable quality control interface. This innovation streamlines the data processing workflow by consolidating multiple quality control scripts into a single, user-friendly Python program, making the work of curators more efficient and allowing them to focus more on the data itself.

The director acknowledged the hard work behind the re-awarding of the Core Trust Seal to ICPSR, emphasizing the contributions of Jared Lyle and his leadership in both ICPSR and the research data community. This recognition underscores ICPSR's commitment to high data standards. Additionally, the recent annual Data Fair, featuring presentations on various topics including artificial intelligence (AI), was a success, with all presentations now available on YouTube for those who missed it. She also highlighted the success of the Summer Program and introduced several new staff members. Levenstein noted that they have hired six new curators and may continue to expand the curation team. Their hiring comes after a budget planning process that involved difficult decisions due what had been a projected large deficit.

Levenstein reported on a planned search for a new faculty member in the research professor track. The search committee will be chaired by Trent Alexander and includes Amy Pienta and Economics/Population Studies Center associate professor Mike Mueller-Smith. The search focuses on candidates researching social determinants of health and population health disparities, with an interest in expanding data-sharing infrastructure and conducting related research. ICPSR is looking for individuals experienced in data stewardship, data linkages, data privacy, and data justice. Levenstein asks that Council members refer potential candidates to us. She noted that there is not a specific Ph.D. disciplinary requirement, and applicants from various social science and information science disciplines are welcome. ICPSR has several NIH-funded archives and other health-related data resources, making this role increasingly important. The application review will begin in three weeks, but Levenstein emphasized that the search will continue beyond that timeframe. She urged anyone who knows suitable candidates to reach out to them or share information about the position.

Attendees were encouraged to inform their students about the Data Communication Scholarship, which has replaced the former ICPSR paper competition. This new scholarship allows students to creatively present ideas using ICPSR data through innovative formats like videos and podcasts. The first-place award is \$1,000, and the emphasis is on introducing datasets from the member archive.

There are ongoing discussions led by Lynette Hoelter and A.J. Million about the "Code Book of the Future," exploring new ways to present data, possibly through interactive websites. Additionally, Levenstein announced that the Institute for Social Research (ISR), of which ICPSR is a part, will celebrate its 75th anniversary in less than two weeks with a research symposium and other events. This event at ISR will showcase various ICPSR projects alongside other ISR initiatives. She encouraged attendees to participate, highlighting the opportunity to learn about ongoing research and acknowledging Sandra Tang's role in organizing the event.

Levenstein then transitioned to discussing ICPSR's IT goals for 2024, focusing on innovation and sustainability. She emphasized ongoing "technology housekeeping" including efforts to modernize scripts and improve compatibility and security. Key accomplishments since her last update include upgrading the search infrastructure and updating usage statistics for better tracking and auditing of data. These initiatives, supported by an NSF grant, aim to make technology maintenance more efficient and cost-effective. Additionally, she mentioned the launch of a new study homepage for one archive, NANDA, designed to accommodate various data types and integrate a new design system, with plans to expand this format to more data over the next year. Levenstein highlighted ICPSR's commitment to accessibility, with Wendi Fornoff leading efforts in this area for over 15 years. New studies will be made available in an accessible e-reader, although there won't be retroactive e-readers for older datasets.

Levenstein discussed improvements to the data submission process, noting that ICPSR has historically faced challenges with deposits of very large datasets and/or a large number of files. To address these issues, ICPSR has worked on integrating its two systems—OpenICPSR and the regular ICPSR submission process—into a single, cohesive system. This integration aims to streamline data deposits, ensure preservation, and enhance metadata leveraging AI and automation. She also announced plans to modify the OpenICPSR business model, allowing individuals from member institutions to publish their data for free while maintaining public access for non-members. This change aims to better serve member institutions required to share data, especially in connection with grants or publications. There will be a review process for data submitted to OpenICPSR by researchers at non-member institutions. ICPSR will assess the significance of the data to ensure it aligns with the research community's needs and ICPSR's collection development policy, acknowledging that maintaining free access on both sides (deposit and dissemination) is not sustainable. She mentioned ongoing efforts by Kelly Doonan-Reed, Jared Lyle, and Amy Pienta to develop this new “single stream” submission process. The first iteration of the integrated deposit form will be deployed in 2025.

ICPSR is transitioning from Drupal to WordPress to better meet security requirements, with plans for a revamped ICPSR website next year. The new site will incorporate updated membership content, a new design system, and the new content management system. Linda Detterman is also working on reducing the number of pages on the ICPSR website, aiming to modernize its appearance and functionality. Levenstein humorously referred to outdated pages, including one for [DataPass](#), a loosely organized alliance of U.S. data archives.

Levenstein indicated that she would not provide an update on new data resources or archives, as that information is available in Amy Pienta's comprehensive report and the weekly ICPSR newsletter. However, she highlighted a specific dataset related to the American Economic Association that was deposited in Open ICPSR. Initially, there were concerns about security upon reviewing the dataset, leading to its removal. After further discussion, the [dataset](#) was deemed consistent with ICPSR's standards and of significant value to the research community.

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

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

Jon Cawthorne, the Budget and Finance Chair, leads the budget committee, collaborating closely with team members including JD Alford, John Lemmer, Margaret Levenstein, Darleen Poisson, and Fillippo Stargell. The committee, which includes Jeffrey Morenoff and Susan Frazier-Kouassi, engages in regular discussions about budget issues with ICPSR leadership. Jon used an analogy of ducks gliding smoothly on water to describe Maggie and John's handling of complex challenges beneath the surface.

He highlighted the importance of understanding the budget, mentioning a current budget of \$30 million with a \$1 million surplus, which he notes is insufficient for expected future funding fluctuations. Jon

emphasized the unique role of ICPSR's council in communicating priorities to ISR leadership and encourages engagement with ICPSR staff to appreciate their hard work.

The budget was approved unanimously. (See attachment 1 for approved budget.) Jon expressed pride in fostering a new culture around budgeting. He opened the floor for questions and encouraged discussion, inviting input from colleagues on the subcommittee.

**Vote:** Primary Research Staff Overhead Account

**Action Items/Next Steps:**

**Slides:** None

## **Discussion & Votes**

Gisela Sin called a vote on the 2024 revision of the Primary Research Staff Overhead Account related to the new ICPSR sequestering policy. Jon Cawthorne, chair of the Budget Committee, explained that the goal is to improve ICPSR's financial management, encouraging directors to spend down their accounts without the costly and burdensome incentive to match exactly the amount of the award. The revisions aim to establish equitable norms and procedures regarding overdrawn accounts. After discussing the recommendation, the council voted unanimously to approve the changes. (See attachment 2 for revised policy.)

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

Esther Wilder presented the report from the Membership, Acquisitions, and User Support Committee, highlighting the collaborative nature of the effort with input from committee members.

The meeting focused on the Consortium Archives Team (CAT), launched in March 2024, aimed at consolidating and strategizing operations to meet ICPSR member needs. There are three parts of CAT: Health, Social Sciences, and Education, each led by dedicated team members. They meet monthly to discuss outreach, data acquisition, and prioritizing member needs.

The CAT team is reviewing numerous studies needing curation enhancements, particularly those released before 2000. Notable new data include the COVID-19 Trends and Impact Survey and Zillow's transaction and assessment database (ZTRAX), expected to be available next year. They are also working on acquiring data relevant to students, such as mental health statistics and tobacco use trends. CAT encourages input from council members on useful data for students.

The Education CAT has established a mission statement focused on "democratizing access to responsible, rigorous, and equitable education." Their efforts center on three main areas: education and outreach, reducing barriers to existing data, and sharing new data resources. Recently, they conducted a webinar on education research in STEM fields as part of the PEERS data hub series. The Gates Foundation approached them about making MET educational video data available for analysis with artificial intelligence, a complex task requiring significant technological infrastructure. While ICPSR will not build the platform, they plan to pilot making the MET data accessible in a cloud format.

The Education CAT has also engaged in pre-deposit consultations for new education projects and is preparing to deposit several studies, including the NIH-funded Enhanced Diversity Study and the Mellon Foundation-funded study on liberal arts education. Some studies await curation, including an inventory of research data services in U.S. and Canadian universities. Since its inception in March, the CAT has efficiently addressed support tickets, with around 80% resolved in less than a day and 65% in under an hour, demonstrating their effectiveness in user support.

The Social Sciences CAT is working on several projects, including additional waves for the popular Detroit Metro Area Communities (DMAC) Study and the upcoming release of the AP VoteCast 2024 primary data. They are also focusing on qualitative family data from the mid-1970s to early 2000s and a Federal Reserve of Cleveland study on small businesses. To better align resources with user interests, Lynette Hoelter noted that they are analyzing search data from the ICPSR website, finding significant interest in environmental issues, climate change, and political science data.

The CAT is updating teaching and learning resources on the ICPSR website, including revising outdated data-driven learning guides and shifting from a paper competition to a communication scholarship format due to low submission rates. The new scholarship aims to engage more students, offering \$1,000 for first place and \$750 for second. Council members are encouraged to help publicize this opportunity, and links to the scholarship details and a sample video are available in the presentation.

Linda Detterman highlighted the challenge of raising awareness about ICPSR, which is often viewed as a "best-kept secret." ICPSR relies heavily on the administration of Organizational Representatives (ORs) to promote its value, especially as many believe they can access similar resources for free. To address this, ICPSR staff are available to conduct webinars for specific classes and graduate programs, and they are exploring ways to enhance outreach, including presentations at conferences that align with their booth displays. The membership committee is brainstorming ideas to better communicate ICPSR's offerings, particularly targeting faculty development and engaging graduate students as future educators.

Regarding Membership, ICPSR finished the previous year with 823 members, adding six new ones while seven discontinued. Currently, ICPSR subsidizes seven memberships, finding it more effective to support members financially than to let them drop, as this encourages their eventual return.

Over the past year, curated downloads increased significantly, reaching 28,000, despite challenges with the new Researcher Passport authentication system. The "Three Amigas" course, to be taught in summer 2025 by three women (replacing the previous incarnations of Three Amigos, whose instructors have stepped down) emphasizes in-person networking and may adopt a hybrid format in the future. The Data Fair was discussed, with a link provided to a spreadsheet of its offerings.

ICPSR's policy on AI usage has sparked concerns, as many users are unaware that their terms prohibit public AI use, which can lead to unauthorized data sharing. Presentations on this topic were well-received at the data fair, and there's ongoing development of an AI policy by the Data Stewardship Policy Committee.

In User Support updates, Ambyr Amen-Ra noted that Arun Mathur retired after 25 years, prompting a reorganization of user-support. The support team resolved over 5,600 user tickets in the past year.

Additionally, management of physical data storage has been transferred to the Metadata and Preservation unit, and new documentation efforts are underway.

Ambyr Amen-Ra shared that a partnership with the Health and Retirement Survey's User Support team has led to the development of a professional code of conduct, modeled after the Atlanta Federal Statistical Research Data Center's guidelines. This code emphasizes harassment-free environments, respectful interactions, scientific integrity, and inclusivity. The code is pending approval from ICPSR leadership for publication on ICPSR's updated help page.

Wilder showcased the evolution of the User Support website, highlighting improvements since 2016. The site has become more user-friendly, with clearer FAQs, video resources, and a simplified layout to enhance navigation and accessibility. By 2024, the site featured fewer words and an organized design, making it easier for users to find information and support.

The help page aims to refresh its design for 2025 by adding user support images, incorporating the new professional code of conduct, and making other changes to improve appearance and usability. A timeline for updates is in place, and user feedback is encouraged. Suggestions for impactful help pages from the council are welcomed.

The ICPSR website, established in 1992, contains 4,309 pages, not including numerous sponsored project and study pages. The team is addressing issues where outdated pages, like old Data Fair content, appear in search results to improve user access to current information. ICPSR also plans to allow more staff contributions to the site while being cautious about preventing inappropriate content, as they want to avoid backlash or the perception of any bias. Additionally, ICPSR maintains several active email lists for archives and subjects, which was shared during the meeting as useful information.

**Vote:** None at this time

**Action Items/Next Steps:** None at this time

**Membership, Acquisitions, and User Support Slides**

### **Summer Program Committee Report**

Gisela Sin, Chair, introduced the committee and Summer Program staff, highlighting key changes implemented this year. The Program reverted to two four-week general sessions, improving upon last year's three-week format that led to long, busy days. This year, the first week focused on introductory math and computing, followed by three weeks of methods classes, which resulted in positive feedback from students, instructors, and computing lab staff.

The Program offered 43 courses and lectures, with 38 instructors and 61 teaching assistants (TAs). However, they noted that the number of TAs may need to be reduced next year. Additionally, 50 topical workshops were held, mostly online, with varied durations.

Housing remained available through the University of Michigan, accommodating about one-sixth of the students, with efforts to increase on-campus attendance due to its benefits for collaboration and faculty

interaction. A successful move to a new headquarters at ISR in Thompson saved ICPSR \$20,000 last year and is expected to save \$35,000 this year.

Financially, the Program generated approximately \$1.9 million in revenue, similar to 2023, with reduced costs due to the headquarters move. Excluding \$160,000 in scholarship funding from ICPSR, there was a net loss of \$30,000, an improvement from the previous year, with hopes for further cost reductions moving forward.

Attendance for the Summer Program reached about 1,200 students, comparable to pre-pandemic levels but below the 1,400 seen during the pandemic years. The ICPSR Michigan Institute for Data & AI in Society (MIDAS) Social Data Science Summer Academy, subsidized by the provost, successfully enrolled many students and faculty, marking its first year of implementation.

This summer also featured an upgraded registration portal, making it easier for students to navigate scholarship options. A variety of scholarships were available, including 50 ICPSR scholarships, 38 diversity fellowships, 64 Rackham scholarships (for University of Michigan students), and additional support for Ukrainian scholars and post-doctoral fellows.

Gisela emphasized that 2024 was a success, focusing on enthusiasm and the new capstone experience for certain fellows. For 2025, the plan includes maintaining the structure of one week for math and computing classes followed by three weeks of summer courses. They will offer a round-robin presentation on the first day, allowing students to explore class options. Future considerations include potential new courses and a shift in interest toward qualitative and mixed methods classes, with less demand for formal theory classes. There may be updates to the curriculum, including the possibility of more data science classes, and ideas for outreach are welcome. The Program will maintain its new headquarters in ISR Thompson and has decided to eliminate classes on holidays, which has been positively received by students.

Plans include reducing the number of TAs for smaller classes and workshops, potentially allowing one TA to support multiple classes. Additionally, pricing for the summer program, unchanged since 2018, may increase by about 4-5% to account for inflation while still aiming to grow enrollment.

Robert Franzese noted that early registration costs \$2,600 for a four-week workshop, and while a price increase is planned, it will be modest to avoid deterring participants. The Program also featured a t-shirt design contest, with a summer camp-themed winner emphasizing cloud computing.

The Summer Program faces fiscal challenges due to its revenue and cost structure. Registration occurs from February to July, meaning this year's revenue will impact next year's budget. Although the Program generates revenue, it is often a net cost to ICPSR in financial terms. Currently, there is a reported approximate loss of \$30,000, which excludes \$160,000 in ICPSR scholarships; if included, the loss would rise to \$190,000. However, this represents an improvement over the previous year.

Significant savings of \$40,000 were achieved by moving to ISR Thompson, despite incurring a \$25,000 termination fee from the University of Michigan's housing. Future negotiations may reduce this fee to about \$12,500, leading to a total of \$52,500 in savings for the current year, with projected savings of

\$60,000 in subsequent years. Overall, the transition to Thompson has been well-received, and it offers better value compared to the previous headquarters at Helen Newberry.

**Vote:** None at this time  
**Action Items/Next Steps:** None at this time  
**Summer Program Slides**

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

Claire Bowen, Chair of the Technology & Standards Committee, introduced the committee members and reviewed the achievements, challenges, and goals of several units: Curation, ProdUX, Metadata & Preservation, and Computing and Network Services.

For the Curation unit, their key achievements included the shift to e-publishing accessible codebooks in addition to pdfs, onboarding six new curators, and hosting a Tips and Tricks section to share quality scripts. They also recognized Benjamin Dreyer as ICPSR Innovator of the Year.

Retention remains a significant challenge, and we have seen several departures. The team is exploring a new career path initiative to address this, as well as working to standardize workflows to reduce bottlenecks and inefficiencies. Uncertainties regarding staffing needs for ongoing projects further complicate matters.

Looking ahead, the group's goals include improving retention through new supervisory support, enhancing cross-unit efficiency, and implementing a new career grid to foster unit cohesion.

In the ProdUX update, key achievements included piloting a new study homepage for NANDA, which improves the identification of datasets, and introducing delivery leads to enhance software delivery, including the integration of the researcher passport. They also developed codebooks in ePub format.

Challenges faced by the team include scope management issues related to the implementation of delivery leads and the need for long-term planning, which involves breaking larger projects into manageable "epics." Lack of clarity from sponsors about 2025 initiatives complicates work planning, and managing legacy systems poses further difficulties, as maintaining both old and new systems can be resource intensive.

Looking forward, ProdUX unit aims to solidify plans for the upcoming year, focusing on a design philosophy that involves breaking work into smaller, six-week chunks for better accountability and quality benchmarking. They also plan to enhance portfolio and resource management systems.

In the Metadata and Preservation unit, the team successfully recertified ICPSR's Core Trust Seal and implemented a new minimum preservation policy that clarifies strategies and rules. They launched a metadata documentation portal that supports new metadata export APIs and made enhancements to the Research Data Environment (RDE), including developing schemas for variable correspondence using DDI Lifecycle.



The main challenge faced is staffing, particularly in terms of retention and resource reallocation. The team is exploring strategies to improve professional growth and retention. Goals moving forward include enhancing user documentation for the metadata export API and the metadata documentation portal, promoting recent improvements in metadata and preservation, launching a new ePub format for codebooks, and coordinating efforts across teams through the new delivery lead role. They also aim to develop a new study homepage for NANDA in collaboration with ProdUX.

The CNS unit faces challenges in breaking tasks into smaller, more manageable chunks while maintaining quality and timeliness. They are implementing a model that emphasizes 51% of efforts on improvement and 49% on maintenance, recognizing the need for innovation alongside ongoing software upkeep. There is a focus on automating processes and deploying code efficiently.

For their goals, they aim to release updates in every eight-week development cycle, which is seen as a way to address challenges, including stakeholder engagement. They acknowledge the importance of involving stakeholders meaningfully rather than operating in isolation. The team plans to enhance their DevOps approach and maintain an iterative roadmap to adapt to new resources, gaps, and emerging issues.

Levenstein highlighted an important achievement that may have gone unnoticed: the successful update of their authority to operate a FISMA moderate environment. This effort, led by Joe Saul, the security and privacy officer, involved extensive collaboration across teams and is crucial for compliance with federal sponsors' increasing security standards. Bowen added that her project also needs to meet FedRAMP compliance, which parallels FISMA moderate standards but is specific to cloud environments, whereas their archives are hosted on local servers. This accomplishment is significant for maintaining partnerships with federal sponsors.

**Vote:** None at this time

**Action Items/Next Steps:** None at this time

**Technology and Standards Slides**

The Council meeting was adjourned at 2:45 p.m. on Friday, October 4, 2024. The next Council meeting is scheduled June 18, 2025.

Note: On June 18, 2025 the minutes were approved with the correction to the Budget and Finance Committee Report to include JD Alford as an attendee by Michelle Evanchuk.

**ICPSR Operating Budget**  
Fiscal Year 2025 Proposed Budget  
August 15, 2024

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

	Sal/Benefits Budget	Non-Salary Budget	Sub-total Budget
Sponsored - Indirect	-		7,100,000
CNS Recharge - Sponsored Project Funded	-		1,489,305
Membership	-		4,675,000
Summer Program	-		1,900,000
UM/ISR Funding	-		303,104
Other non-sponsored	-		-
VDE General Income	-		40,000
University Investment Pool (UIP)			96,832
<b>Total Revenues</b>	-	-	<b>15,604,241</b>

	Sal/Benefits Budget	Non-Salary Budget	Sub-total Budget
Administration	916,874	129,000	1,045,874
Business and Collection Development	226,097	47,770	273,867
Computing and Network Services	3,410,395	895,793	4,306,188
Curation	1,086,532	15,000	1,101,532
Director's Office	1,043,816	55,000	1,098,816
Summer Program Expenses	595,721	1,304,279	1,900,000
Summer Program Scholarships	-	160,000	160,000
Membership and Communications	488,266	123,028	611,294
Metadata and Preservation	532,872	28,260	561,132
ProdUX	702,264	15,000	717,264
Project Management and User Support	831,290	25,000	856,290
ICPSR Overhead			
Building Fund	-	514,484	514,484
I/O Split	-	1,186,281	1,186,281
Provost Taxes	-	630,394	630,394
Directors' Strategic Innovation Funds		50,000	50,000
<b>Total Expenses</b>	<b>9,834,126</b>	<b>5,179,289</b>	<b>15,013,416</b>

**Operating Revenues minus Operating Expenses** **590,826**

**REVISED (2024) POLICY ICPSR PRS OVERHEAD ACCOUNTS****ICPSR Sequestering Policy**

**Eligibility:** All Primary Research Staff with ICPSR appointments.

**Purpose:** A portion of Indirect Cost (IDC) funds are sequestered to fund project overruns and to provide incentives for research. This policy aims to:

- (a) Create incentives for careful financial management
- (b) Decentralize decision making
- (c) Create equitable norms and procedures with regard to overruns

**Proposal:** Every year a percentage of the overhead received on each grant or contract will be set aside for the use of the Primary Research Staff (PRS) member P.I., subject to considerations described below. These funds will be sequestered until the grant has been completed (including all years if it is a multi-year grant). **Sequestered funds will automatically be used to cover any overrun over \$1,000 on the project.** Any sequestered funds remaining after overruns are resolved will be released to the eligible PRS at the end of the grant period to further their research program. The percentage of IDC sequestered will be decided by the Director's Office with advice from the ICPSR Advisory Council (IAC).

**Guidelines:**

1. Funds will be sequestered on sponsored projects with indirect cost rates greater than 35%.
2. To prevent the proportion of ICPSR discretionary funds from becoming too great, the Director's Office will review the ICR needed for operating expenses (including normal annual encumbrances) over the preceding fiscal year and will determine the amount available for sequestering as part of the budgetary process. The sequestering program will be adjusted to assure that all required expenditures will be covered.
3. Initially, sequestered funds will accrue at the rate of 5% on the first \$100,000 of IDC and 2.5% on IDC in excess of \$100,000 per fiscal year. The rate of sequestering may be increased or decreased depending on Center revenue and other considerations by the Director with advice from the IAC.
4. A PI may spend no more than \$50,000 from released sequestered funds in a fiscal year without agreement from the ICPSR Director.

5. Co-P.I.s: **In line with ICPSR's goal of decentralizing decision-making**, P.I.s and Co-P.I.s will be expected to agree on the allocation of sequestered funds at the beginning of a project.
6. If a project carrying little or no overhead is deemed particularly worthy for social or scientific reasons, the Director with advice from the IAC may agree to a special sequestering arrangement.
7. If a P.I. has several grants ending at about the same time, some avoiding overruns, some having very large overruns, IAC will consider this as a special case and advise the P.I. of its views on handling the inconsistency. No formal rule is stated, but a decision by the ICPSR Director and IAC would be considered definitive on how to handle such cases.
8. This policy does not eliminate the role of ICPSR and the Institute for Social Research as **"insurer of last resort," a requirement that should be very rarely** invoked.
9. As with all entitlements, sequestering may be suspended in an emergency.
10. IAC will consider an advance before the grant end date, if it is determined that the risk of an overrun is negligible.
11. Funds will be released only when all subaccounts have been terminated.
12. ICPSR will keep track of accrued sequestered funds and provide this information to PIs on request with sufficient notice.

# ICPSR Council October 3, 2024

Innovation and Sustainability

ICPSR

## 2024 Innovator of the Year

ICPSR

## Benjamin Dreyer, Senior Curator Creation of a Configurable Quality Control Interface

Benjamin, a Senior Curator, took the initiative to develop a User Interface that combines many of Curation's existing scripts into a user friendly, configurable Python program. The program allows Curators to select the desired checks for a study, batch run them, and review the standardized output written to a single folder.

This innovation helps address the prior need to individually run up to 8 different self-QC scripts for each study, sometimes needing to run one script several times on individual files. This tool can run *all* necessary scripts in the time it would take to run a single script while saving a record that is also useful for the peer-QC process.

Benjamin has spent more than 2 years building ~14 files and writing ~2,000 lines of code to deliver this configurable tool that builds on previous work by Peggy Overcashier and others in Curation. This a useful new tool for the Curation Unit with some curators reporting a "sense of relief" knowing if a Hermes rerun is required, this tool will recreate everything they need.



ICPSR

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## Data Stewardship

**"CoreTrustSeal certification demonstrates that a repository assures long-term accessibility and understandability of data as the needs of the research community change."**

ICPSR Director Maggie Levenstein



ICPSR

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4

## Watch on YouTube

<https://www.youtube.com/playlist?list=PLgC9lrhW1VvbzKyJDevx5f57-WgA5DrPD>

ICPSR

### 2024 ICPSR Data Fair

## Anchored in Data Reality



#### Schedule

All times are ET and sessions are one-hour long

#### Monday, September 16

- 11:00 am Data Brunch Live! State of the Consortium
- 12:30 pm Child and Family Data Archive
- 2:00 pm DSDR: 20 Years of Sharing Population Health Research Data & Resources
- 3:30 pm Invalid with Any Code

#### Tuesday, September 17

- 11:00 am ICPSR Summer Program 2025 and Beyond!
- 2:00 pm Introducing ICPSR's New Metadata Export API
- 3:50 pm PEERS Data Hub Presents: Navigating the Waters of Education Data: Finding and Using Data from Public Access Websites

#### Wednesday, September 18

- 11:00 am Defining Preprints & Their Role in the Bibliography of Data-related Lit.
- 12:30 pm COVID Data Roundup: Exploring COVID-Related Data in ICPSR's Archives
- 2:00 pm Navigating Crime Data: Unlocking the Treasures of NACJD
- 3:50 pm NIH Data Sharing Guidelines: Charting the Course for Compliance

#### Thursday, September 19

- 11:00 am Harnessing AI for Metadata The TurboCurator Story
- 12:30 pm SOMAR: Exploring the Innovations of the Social Media Archive at ICPSR, featuring Meta Content Library API
- 2:00 pm Data Use in the Age of Artificial Intelligence
- 3:50 pm North of 49: An Introduction to Canadian Data



ICPSR Learn more & register at [myumi.ch/ICPSRDataFair2024](https://myumi.ch/ICPSRDataFair2024)

## ICPSR SUMMER PROGRAM

IN QUANTITATIVE METHODS



ICPSR

## ICPSR's new people



**Stephanie Teasley**

Professor of Information,  
Emerita



**Marcell Hawkins**

Security Analyst/Engineer



**Dominic Bonanni**

Data Project Manager



**Xinchen Zao**

Research Data Engineer

ICPSR

7

## Project Management and User Support



**Belle Kneeland**

Junior Professional  
Researcher



**Reyna Lee**

Data Project Assistant



**Abigail O'Keefe**

Data Project Assistant



**Doug Rosin**

Junior Professional  
Researcher

ICPSR

8



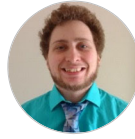
## Curation



Dominic Coschino



Syd Diller



Phillip Markee



Nadya Neuhaeusler



Omar Sacramento



Aura Walmer

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9

**Arun Mathur**  
**Membership**  
**User Support**  
**Retires**



ICPSR

## New faculty search

Please share!

ICPSR invites applications for a full-time Research Professor position (open rank) with a research focus on social determinants of health, population health, health disparities, or a closely related social science focus.

Expand data sharing infrastructure and conduct related research, thereby increasing the reuse and impact of data for addressing pressing health problems, such as disparities and inequities across sociodemographic groups

Social scientist with experience in data stewardship, data linkages, disclosure risk and confidentiality protection, data justice, and data feminism

[https://careers.umich.edu/job\\_detail/254702/icpsr-research-professorresearch-associate-professorresearch-assistant-professor](https://careers.umich.edu/job_detail/254702/icpsr-research-professorresearch-associate-professorresearch-assistant-professor)

ICPSR

ICPSR

Deadline  
Feb. 23!

### Data Communication Scholarship

For undergraduate and  
graduate students



Find out more:

<https://myumi.ch/Xeo1y>






ICPSR



**ICPSR**



## IT goals for 2024

 <p><b>Study Home Page</b></p> <p>Launched for NANDA Archive Explore Data Fully accessible Epub codebooks</p>	 <p><b>Single Stream Ingest</b></p> <p>“Thin slice” nearly complete</p>	 <p><b>Content Management System</b></p> <p>New pages in new system ICPSR will get complete refresh in 2025</p>	 <p><b>Design System</b></p> <p>Used in new content</p>	 <p><b>Technology housekeeping</b></p> <p>Search infrastructure updated Usage statistics updated</p>
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**ICPSR**

14

Same ICPSR data, new look!

Study home pages have a new design. [Read this article](#) for more details.

Login

NaNDA

About Help Find Data

## National Neighborhood Data Archive (NaNDA): Broadband Internet Availability, Speed, and Adoption by Census Tract and ZIP Code Tabulation Area, United States, 2014-2020

**CURATED** **PUBLIC** [What's this?](#)

Principal investigators: [Mao Li](#), [Iris Gomez-Lopez](#), [Anam Khan](#), [Phillippa Clarke](#), [Megan Chenoweth](#)

Geographic coverage: [United States](#)

Time periods: 2014-01-01 to [2020-12-31](#) (ICPSR ended FY24 stream)

This study contains two data files. Data file one (Broadband Internet Availability, Speed, and Adoption by Census Tract)

125

Downloads

2

Citations

[Related publications](#)

ICPSR

## ICPSR Funding Sources

	FY2024 Budget	FY2024 Actual
Membership Revenues	4,532,000	4,718,071
Summer Program	2,000,000	1,880,281
IDC & CNS Recharge	8,435,396	8,445,870
UM/ISR Funding	326,055	416,636
Total Non-sponsored Revenue	15,313,451	15,589,607

Additional  
~\$13M in  
sponsored  
direct revenue

ICPSR

16

## ICPSR Spending

	FY2024 Budget	FY2024 Actual
Salaries	10,049,815	9,427,606
Non-salaries	2,810,153	2,999,649
ISR (building fund & I/O split)	1,687,712	1,631,017
Provost taxes	599,703	599,703
Total Non-sponsored Expenses	15,147,383	14,657,974

Additional  
~\$12M in  
sponsored  
direct  
spending

ICPSR

17

## ICPSR ended FY24 strong

	FY2024 Budget	FY2024 Actual
Total Operating Revenue	15,313,451	15,589,607
Unit Expenses	12,589,967	12,427,255
ICPSR Overhead	2,287,415	2,230,720
Operating Surplus	166,069	931,633

ICPSR

18

## ICPSR FY25 budget

Unanimously approved  
by Council

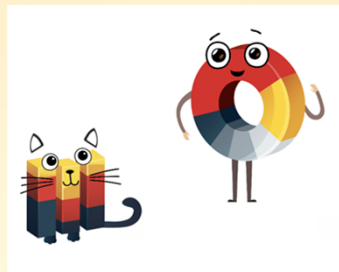
Thank you!!!

FY2025 Budget	
Total Operating Revenue	15,604,241
Unit Expenses	12,632,256
ICPSR Overhead	2,381,159
Operating Surplus	590,826


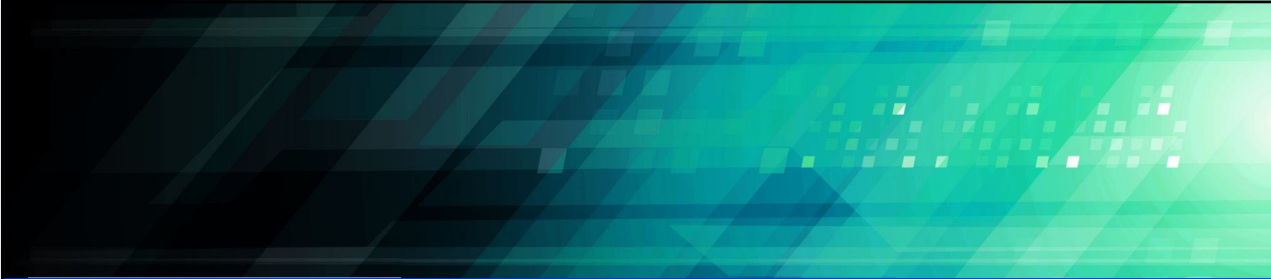
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19

# Thank you!



ICPSR



# Questions?

Thank you!

ICPSR



# Summer Program Committee Report

ICPSR Council Meeting  
October 3-4, 2024

Committee members: Randall Akee, David Armstrong, Sandy Marquart-Pyatt & Gisela Sin

Summer Program: Rob Franzese (Director), Stephanie Carpenter (Program Manager), Laura Zimmerman (Admin Ass.), Scott Campbell (comm), Sandy Zalmout (tech and inclusion), Lia Trapaizde (contract & finance)

## 2024 Program Review

- *General Sessions:* Back to Two 4-Week
  - 16 methods Courses +6/+5 intro/review math & computing Lectures
  - NEW: Week 1 math & computing Lectures; Weeks 2-4 methods Courses
  - 43 total Courses & Lectures, 38 instructors, 61 TAs (too many & allocation)
- *Workshops*
  - 50 workshops, 4 co-list GSERM, 7 Sponsored. Total 61 Workshops
  - No offsite partnerships (excepting GSERM) ; fewer in-person hybrid/dual mode
- Housing was available through UM
  - 1/6 of students
- New HQ = ISR-Thompson (saved \$40,000!)



## 2024 Program Review

- FISCAL OVERVIEW:

- Approx. \$1.90M revenue (approx. steady from 2023); Costs down; netting \$160K ICPSR scholarships, **-\$30K** bottom line.

- Attendance

Table 1. Registrations in the ICPSR Summer Program by Type of Offering, 2017-2023.

Registrations	2017	2018	2019	2020	2021	2022	2023	2024
Topical Workshops*	407	447	424	602	521	287	499	471
Sponsored Workshops*	160	98	123	66	190	61	136	139
Workshop Total (Seats filled, participants counted once each Workshop)	567	545	547	668	711	348	635	610
Session I only	174	188	221	241	212	224	273	262
Session I and II	87	98	96	150	185	129	85	66
Session II only	169	165	172	143	145	165	189	199
General Sessions Total (s1+s2+2*Both)	517	549	585	684	727	647	632	593
Total Registrations	997	996	1036	1202	1253	866	1131	1137 (1041)
Total Classes (Workshops+Gen. Sessions)	1084	1094	1132	1352	1438	995	1216	1203

The parenthetical (1041) SumProg2024 Registrations is the count from the registration app, which newly in 2024 allowed Workshop & General Session registrations in the same single transaction.

## 2024 Program Review

- All-New ICPSR-MIDAS Social Data Science Summer Academy: UM Provost subsidized UM "researchers" to \$100; otherwise = 40-hour Topical Workshop
- Registration Portal Upgraded
- Scholarships:
  - 50 ICPSR;
  - 2 Miller + 1 Owen (\$424) +1 Heitowit scholars
  - 38 Diversity scholars (funded by ICPSR, ISR, and the UM Provost and includes dorm, meals, and travel subvention)
  - 64 Rackham Scholars (UM grad students only)
  - 10 EITM
  - 14 Ukrainian scholars
  - 6 UM African Studies Center
  - 11 (UM) Provostial Postdoctoral



## 2024 Program Review

- 2024: resounding success!!!!
- Approach & motto: *enthusiastic encouragement and encouraging enthusiasm*
- New: Summer Program as a capstone experience for Fellows of Susan Frazier-Kouassi's (Prairie View A&M)

## Planning for 2025

- New 1+3 structure
- New Courses & Lectures.
- New HQ
- No class on holidays
- Continue expand outreach, boost total & in-person participation yet more
  - IDEAS????
- Reduce the number of TAs
- Pricing?



# ICPSR Technology & Standards Committee Report Fall 2024

Attendees: Claire McKay Bowen, Michael Cafarella, Mi Steeleworthy

Trent Alexander, Aalap Doshi, Jared Lyle, Trisha Martin, Rujuta Umarji, Candice Wilson

## 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.

## Curation

### *Key Achievements*

- Transitioned to publishing all codebooks in both PDF and ePub with ProdUX and CNS.
- Onboarded 6 curators in Summer 2024 to address resourcing gap.
- Identified *Fast Release* as a distinct curation level alongside L1/2/3 and variable-level metadata release. Downstream changes to work organization, reporting, capacities.
- Hosted a “Tips and Trick Session” with Benjamin Dryer, who is ICPSR’s Innovator of the Year for creating a program that automates 8QC scripts critical to curation.

## Curation

### *Challenges*

- Retention continues to be a challenge with 4 departures since April 2024.
  - **New career path grid should help.**
- Non-standardized workflows in curation can cause bottlenecks and inefficiencies, creating a backlog.
- Uncertainty in short-term and long-term staffing requirements as well as existing retention issues has put the unit behind on some projects.

## Curation *Goals*

- **People** - Have new supervisor filled in this Fall and curator positions filled in this Winter.
- **Non-standardized workflows** - Work with PuMUS and BCD to improve cross-unit efficiency.
- **Unit cohesion** - Implement new career grid and development of accompanying FAQ; identify recommended training for career and skills development.

## ProdUX *Key Achievements*

- Piloted a new study homepage (NANDA), which paves the way for further transitions on the new platform.
  - Will include easier identification of datasets with online analysis opportunities and data exploration, and viewable codebooks.
- Introduced *Delivery Leads* to enable focus on delivering working software.
- Integrated Researcher Passport into RDE portal.
- Created codebook development in epub format.

## ProdUX *Challenges*

1

- **Scope Management** - Improvements here with implementation of Delivery Leads and longer-term work planning (epics).
- **Contingency planning** - Lack of clarity on potential funds from sponsors, especially in 2025, hinders work planning.
- **Mitigation of legacy systems** - Navigating multiple generations of underlying systems.

## ProdUX *Goals*

- **Solidify plans for calendar year 2025!**
- **Design Velocity** - Breaking work into smaller 6-week chunks for accountability and benchmarking improves quality and timeliness.
- **Portfolio and Resource Management** - Further developing these systems and practices.

## Metadata & Preservation

### *Key Achievements*

- Submitted a successful ICPSR recertification of CoreTrustSeal.
- Implemented new Preservation Commitment Policy that clarifies strategies, roles, obligations with stakeholders.
- Launched Metadata Documentation Portal and contributed to the new metadatas export API.
- Made enhancements to RDE and RDE Metadata Schema (e.g., controlled vocab, PIDs, and geodata representation).
- Developed cross-wave variable concordance for 2 surveys using DDI Lifecycle (i.e., CRELES - 3waves, 2800s vars; HEPSE - 9 waves, 4700vars).

## Metadata & Preservation

### *Challenges*

- **Staff resourcing** - leaves have necessitated retraining and re-allocation.

## Metadata & Preservation

### *Goals*

- Improve user documentation for the metadata export API and metadata documentation portal.
- Promote metadata and preservation improvement through RDE in general, especially re-retrofitting metadata.

## CNS

### *Key Achievements*

- Launched new .epub format for codebooks going forward.
- Created new *Delivery Lead* role for each existing team.
  - This role will coordinate across teams and alleviate burden from leads.
  - “It’s improved things. I would do it a again”
- Developed a comprehensive ICPSR software portfolio - used for licensing and lifetime management.
- Developed new study homepage for NANDA (with ProdUX).



## CNS *Challenges*

- Trying to always get to smaller and more frequent releases to speed up the feedback loop.
  - Dev's can now deploy themselves (i.e., subject to testing, etc).
  - Code can be shifted to environment in 5 minutes.
- Aiming for improving and automating more than it is fixing and remediating. (i.e., 51/49 model)

## CNS *Goals*

- Release something meaningful every development cycle (8 week cycle).
- Include stakeholder input so it is not sitting in a vacuum
- Support a DevOps work and roadmap.
  - These roadmaps are deliberately iterative and encourage adjustment to account for new resources, gaps, and bumps on the ground