# ICPSR’s Strategic Plan: Creative Responses and an Evolving Vision

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Dear Colleagues,

I am delighted to introduce our new Strategic Plan to the ICPSR community. Our updated mission statement renews our commitment to promoting scientific research:

ICPSR advances and expands social and behavioral research, acting as a global leader in data stewardship and providing rich data resources and responsive educational opportunities for present and future generations.

ICPSR recognizes the importance of setting clear directions and continually working toward an even more successful future. We live in times when new technologies, new forms of data, and demands for open access to data promise to change the conduct of research. This Strategic Plan outlines the need for creative responses and an evolving vision of the future.

This Plan resulted from a yearlong process intended to develop a long-range vision and set priorities for the next three to five years. We are grateful to the ICPSR staff for their sustained involvement in this process and to the many Official Representatives and other friends who contributed to this Plan.

Now, we begin the exciting work of making it happen. We welcome your advice, ideas, insights, and perspectives. I encourage you to read the Plan and share your feedback with us.

George Alter, director

Please submit your comments to icpsrstrategicplan@umich.edu
Strategic Goals
ICPSR seeks to leverage its historic and current success, its strong membership and partnership network, and its position as a leader in order to increase stakeholder value and support a vibrant field of social and behavioral research.

1. Internal and External Synergy
   Building linkages and communication across activities and programs that have previously functioned in relative separation.

2. Inclusion and Diversity
   Together these directions expand ICPSR’s work into new regions of the world, integrate new voices into the organization’s development processes, and expand educational opportunities to new communities.

3. Build on Strengths
   Each piece of this plan is constructed on groundwork laid by the previous strategic plan, and draws on ICPSR’s current assets and successes.

Strategic Directions
The plan consists of four strategic directions. Three of these directions are focused externally on ICPSR’s roles both nationally and internationally, as well as the products and services that it offers to members and the wider world of social inquiry. The fourth direction is designed to align organizational structures and processes with strategic priorities.

1. Enhancing Our Global Leadership
   ICPSR will enhance its role as a global leader in data stewardship, engaging the global community as a partner, convener, advocate, and supporter.

2. Developing New and Responsive Products and Services
   ICPSR will create innovative data services through ongoing research and development driven by systematic approaches to increasing engagement and eliciting feedback. These data services will lead to new revenue models and funding sources. ICPSR will also expand the types of data it provides to reflect new research methodologies.

3. Advancing Knowledge, Skills, and Tools for the Research Community
   ICPSR will expand its role in building knowledge, awareness, and understanding of the research process — including all phases of data management and analysis — to facilitate effective, responsible, and productive research activities.

4. Expanding Organizational Capacity for Leadership and Innovation
   ICPSR will invest in its staff and internal organizational structures and systems to establish a solid foundation for new undertakings and successes.
ICPSR will enhance its role as a global leader in data stewardship, engaging the global community as a partner, convener, advocate, and supporter.

Rationale: As the data landscape undergoes rapid transformation, archives, universities, publishers, libraries, and others around the world are looking to ICPSR for leadership in adapting to new challenges and seizing new opportunities. There is also a need to introduce ICPSR to new audiences and to bring diverse voices and perspectives to the table to enrich the global scholarship network. By fully engaging with the global data community in a collaborative way, ICPSR can advance data-enabled science and facilitate research for the broader good.

Direction 1: Enhancing Our Global Leadership

Strategy 1. Develop national and international partnerships.
Increase outreach to groups involved in managing, curating, preserving, and providing access to research data, creating interdisciplinary partnerships based on shared goals of advancing science and building sustainable infrastructure.

Strategy 2. Facilitate consensus building and advocacy around issues of import across the full lifecycle of research data, from data collection to reuse and beyond.
Take the lead in facilitating global and interdisciplinary discussion around key topics related to research data, with an emphasis on data access and sharing. Through convening groups and creating partnerships, ICPSR will stimulate the development of and compliance with standards and norms of the field, advocate for responsible data stewardship, and help to enhance and expand the shared infrastructure for data.

Strategy 3. Support emerging capacity around stewardship of research data for international partners.
Offer capacity-building support to international partners, with a focus on developing countries that are in the process of building new data systems but face resource- and capacity-related barriers.

Strategy 4. Expand the ICPSR membership network to build the global community of scholars, ensuring an open and inclusive structure.
Expand membership in parts of the world currently underrepresented in the membership, enlarging the ICPSR network, facilitating more research, and supporting new and existing members with additional training and research opportunities.
Direction 2: Developing New and Responsive Products and Services

ICPSR will create innovative data services through ongoing research and development driven by systematic approaches to increasing engagement and eliciting feedback. These data services will lead to new revenue models and funding sources. ICPSR will also expand the types of data it provides to reflect new research methodologies.

**Rationale: ICPSR is a leader in creating data services that respond to the needs of diverse data users — from custom data products for researchers and educators to support services for institutional archives. We will extend this capacity to innovate by taking advantage of opportunities across disciplinary, institutional, and national boundaries. ICPSR will put in place systems to connect and listen to communities of interest in order to anticipate and deliver new forms of data and innovative data services to these communities with the expectation that these data services will result in additional funding streams.**

**Strategy 1. Heighten engagement with the community to improve services and respond to emerging needs.**

Develop sustained outreach processes to engage users and potential users, soliciting continuous feedback on and ideas for data products and services from members, leaders in the research community, and a diverse set of users.

**Strategy 2. Imagine and develop innovative data services through ongoing research and development.**

Building on user input and feedback, design services and products that solve real problems and facilitate data-driven research, instruction, and policymaking.

**Strategy 3. Develop revenue sources from new and existing services.**

Increase revenue by developing equitable and sustainable funding models and by exploring new data services that increase organizational resilience.

Leveraging our success

In order to leverage its current success while adapting to new opportunities and challenges, in the fall of 2012 the Inter-university Consortium for Political and Social Research (ICPSR) launched a strategic planning process. This process was meant to develop a long-range vision and set strategic priorities for the next three to five years. ICPSR asked consulting firm Cambridge Concord Associates (CCA) to support the Consortium in this effort. (Learn more about the process on page 9.)
ICPSR will expand its role in building knowledge, awareness, and understanding of the research process — including all phases of data management and analysis — to facilitate effective, responsible, and productive research activities.

**Rationale:** ICPSR will increase its portfolio of knowledge-building opportunities to meet the challenges posed by the increasing abundance and complexity of data. The organization is well known for its outstanding Summer Program in Quantitative Methods of Social Research and its resources supporting the use of data in the classroom and quantitative literacy. These strengths can serve as a springboard to new levels of excellence in educating the next generation of effective and responsible data producers and users.

**Strategy 1. Engage new audiences in ICPSR’s educational programs.**
In keeping with the broadening of ICPSR’s mission, bring the ICPSR “brand” to new user communities, including those with a need for methodological training and those with a focus on data science and stewardship.

**Strategy 2. Widen access to ICPSR’s training and related tools.**
Explore innovative ways to deliver ICPSR’s educational content and products to ensure global access, while maintaining high standards of excellent instruction and rich learning experiences.

**Strategy 3. Build educational partnerships across communities and sectors.**
Pursue partnerships and collaborations to enhance the geographical reach and substantive coverage of ICPSR’s educational offerings, forging relationships that open up new opportunities for learning and growth.

**Strategy 4. Increase cohesion and integration of knowledge-building opportunities.**
Implement greater connections among ICPSR’s educational programs and products to reach students at different levels, heightening exposure to effective research methods and data management across the educational pipeline.
ICPSR will invest in its staff and internal organizational structures and systems to establish a solid foundation for new undertakings and successes.

Rationale: In order to achieve the directions outlined above, ICPSR needs to evolve the organization and its structures to reflect an ongoing commitment to effective planning, communication, and transparency. This will involve aligning internal systems with external priorities. Such alignment will enable the organization to leverage more fully the strengths it already possesses, as well as build new capacities.

Strategy 1. Foster a culture that encourages learning, problem solving, innovation, and contributions from all staff.
Support innovation and knowledge sharing, empower staff to make good decisions in their areas of expertise, and put in place opportunities for new challenges, growth in knowledge and skills, and recognition for contributions.

Strategy 2. Ensure a high-performing staff that reflects and values diversity and inclusion.
Guided by our Diversity Strategic Plan, focus on best practices for recruiting, developing, and retaining an exceptional staff. Ensure that all of ICPSR embraces the culture of diversity, leading to greater productivity and innovation.

Strategy 3. Communicate effectively across the organization, building bridges across groups and excitement around ICPSR’s mission.
Increase communication and awareness across all parts of the organization to develop a fully engaged workforce that can plan for the future, innovate, lead, and serve as strong advocates for the organization with a stake in its success.
Mission Statement

ICPSR advances and expands social and behavioral research, acting as a global leader in data stewardship and providing rich data resources and responsive educational opportunities for present and future generations.

forward thinking

While the core work of ICPSR remains constant, this plan marks areas of significant expansion and shift, necessitating an updated mission statement.
Strategic Plan: Planning Process

Plan Development
Since ICPSR released its previous Strategic Plan in 2008, new forms of data-based research have emerged, and the data archiving community continues to grow and develop. New mandates for open access to publicly funded scientific data offer great benefits to the scientific community and the public, but they raise important issues about capacity and sustainability. Economic uncertainty has altered the funding picture for many in the research community. Given this changing context, ICPSR recognized the need for new strategies and an evolving vision for the future of the organization and the field.

Assisted by Cambridge Concord Associates (CCA), the first phase of the planning process began in September 2012 with a full-day retreat of the senior leadership group. This was followed by a process of information gathering both inside and outside the organization including phone interviews and meetings with ISR and ICPSR staff, ICPSR Official Representatives, partner institutions, and others who have worked with the Consortium in various ways.

In November 2012, the ICPSR senior leadership group met for a second retreat facilitated by CCA. Participants laid out an initial framework for a strategic plan including a set of preliminary strategic directions. Additional input was sought from Official Representatives, Council, and ICPSR staff. The final version of the Plan was published in September 2013.

Strategic Planning Group
The Strategic Planning Group consisted of the following:

George Alter, ICPSR
Rita Bantom, ICPSR
Bryan Beecher, ICPSR
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Ken Sylvester, ICPSR
Diane Winter, ICPSR
Mary Vardigan, ICPSR
Tom Zelenock, ICPSR

Current Status
ICPSR staff currently is developing achievement tactics and success measures for each of the strategies within the four directions.

Implementation
Implementation of ICPSR’s Strategic Plan is expected to begin in January 2014.