

2017 IRIS Data Summit

September 21, 2017
Ann Arbor, MI



EXECUTIVE SUMMARY

Thank you to those who attended the 2017 IRIS Data Summit. We found the discussions very useful and write now to follow up on the rich threads of conversation.

Turnout at the Summit was excellent: a total of **57 representatives** from **IRIS**, the **U.S. Census Bureau**, **21 IRIS member universities**, **4 prospective member universities**, and the **Association of Public Land Grant Universities (APLU)** attended the event. Attendance at this year's Data Summit increased by about a third over last year's event, and represented a 49% increase over the first event held in 2015. About 1 in 5 attendees at this year's event attended last year's Summit in Washington, DC. The meeting agenda and list of participants are appended to the end of this summary. Presentation slides are also attached.

Three broad themes emerged from the day's discussions:

Communication is critical. The power of IRIS reports is diminished if they aren't communicated effectively to the right stakeholders. A thoughtful governance structure that includes a diverse set of representatives facilitates good communication. Ensuring that reports reach the people who can use them to tell a university's story demands identification of key allies, both internally and externally.

Contextualizing the data is essential. Simply posting reports online or as part of a larger compendium of institutional data with no information to help put them in context is perhaps worse than providing no information at all. As universities take steps to share their IRIS reports with key constituents, they must think carefully about how to frame them so they can best be understood in context.

Leveraging the power of aggregation should be a priority. IRIS has strong relationships with a number of higher education associations such as the Association of American Universities (AAU) and the Association of Public and Land-grant Universities (APLU), but should continue to expand to organizations like the Council on Government Relations (COGR). In addition, IRIS should explore ways to create aggregate reports by conference and/or region.

Action items and next steps:

- Data updates:
 - IRIS will develop a match report for the vendor report that shows the dollars not matched against total dollars spent.
 - IRIS will continue to develop its object code classification system to better capture internal spending. For those members wishing to submit non-federal data, IRIS will provide guidance.
 - IRIS will pursue the identification and incorporation of new datasets and tools that might provide fruitful in terms of interesting linkages, doing so in ways that require relatively little work on the part of members.

- Possible aggregate reports will be developed, such as AAU institutions, state/region level reports, etc.
- Tools and support:
 - IRIS will refine guidance for member governance to enhance communication and to better leverage data products.
 - IRIS will work to make TAG meeting discussions more transparent by making meeting summaries available in the IRIS portal.
- Overall:
 - Membership in IRIS is growing and this must continue; IRIS leadership will continue to pursue new members to enable the kind of aggregation that will permit more powerful reporting.
 - Future Data Summits should span two days and should include time for networking and interaction among attendees.

Please take a few moments to complete a brief evaluation of this event to help us improve future summits: [IRIS Data Summit Evaluation](#)

Mark your calendar! Save the date for the 2018 Data Summit to be held in Ann Arbor:

October 15-16, 2018

Look for more details to come. Thank you and we hope to see you next year!

The IRIS Team

Agenda

8:30-9:00 **Continental breakfast**

Buffet in Room 1450

9:00-9:15 **Welcome**

David Lam, Director, University of Michigan Institute for Social Research (ISR)

9:15-9:45 **Keynote Address**

Alice Meadows, Director of Community Engagement & Support, ORCID

Enter Once, Reuse Often: Making ORCID's Vision a Reality for Researchers and Their Institutions

ORCID's vision is a world where all who participate in research, scholarship, and innovation are uniquely identified and connected with their works and affiliations across disciplines, borders, and time. This vision is starting to become a reality. For example, researchers can already choose to automatically and reliably connect their publications to their ORCID record. An important next step is for institutions to assert their researchers' affiliations, enabling this authoritative information to be entered once and reused often - in research information management and profile systems, in funding applications, during the manuscript submission process, and more. Doing so will benefit the researchers, their institutions, and the wider research community.

9:45-10:45 **Session 1: Sending Data to IRIS**

Administrative data sent to IRIS by its member universities can pose unique challenges. To make the IRIS data production most efficient, there is sometimes considerable work that is needed. This session offers three presentations that will focus on methods to enhance spending data, all focused on quality assurance and data enhancements.

Enhancing Vendor Reports

Presenters: Amy Butchart & Rob Truex, IRIS

The process IRIS uses to transform your administrative data into the vendor reports you see can seem opaque. This presentation shows you 'how the sausage is made' and how elements of the data you provide to IRIS are important to producing the report metrics you see.

Sending Non-Federal Spending Data: Capturing Internal University Spending

Presenters: Todd Woodman, University of Arizona

The inclusion of non-federal spending data can enhance the current reports by showing all research dollars verses federal dollars only. Capturing internal university spending will provide additional metrics, more actionable reporting, and identifiable areas of opportunity. This presentation shows you some of the challenges of data collection, the impact of including non-federal spending, and potential new data points.

Object Code Classification: Some Implications

Presenter: Jason Owen-Smith, IRIS

Many IRIS member institutions share object codes, which have the potential to allow us to characterize the types of goods and services purchased from vendors and subcontractors as well as their sources. We have begun working to create a high level categorization scheme (similar to the occupational classifications we currently use) that will inform future reporting. This presentation describes those efforts, their potential uses, and presents a draft object code classification for your feedback.

10:45-11:00 Break

11:00-12:00 **Session 2: Using Reports IRIS Produces** (concurrent sessions)

Making the Most of the IRIS Membership

Panelists: Kristina Ko, University of Michigan

Missy Peloso, University of Pennsylvania

Nick Wigginton, University of Michigan

Universities have a variety of reasons for wanting to join IRIS, and they each face unique challenges in providing the data and in using the reports they get back from IRIS. For example, some institutions join because they have been directed to do so by a president, and the individuals tasked with making it happen may not be quite sure how to best utilize the IRIS resource. This panel will focus on ways to achieve greater institutional buy-in, enhance data products, and play a role in making IRIS a truly national resource for universities. We aim to address at least some of the following questions:

- How do you get people excited/interested in this work who haven't been part of the decision-making process?
- What can you do if your institution doesn't want to submit all the data? How can you work with your IR office and others to identify other data points that might be useful to include?

- How can you work with IRIS to shape useful reports that fit the needs of your campus?
- Is there a role for IRIS in producing nationally aggregated data to support university research advocacy?

Navigating the IRIS Portal (Room 1440)

Presenter: Kevin Bjorne, IRIS

This session will center on how to work most effectively in the IRIS portal, seeking input from participants in design, usability, and desired features.

12:00-1:30 **Working Lunch** Buffet in Room 1450

TAG Report (*Kevin Bjorne, IRIS; TAG members*)

Panel Discussion: Engaging Stakeholders with IRIS Data Products

Panelists: Kim Griffin, Northwestern University

Jed Marsh, Princeton University

Marvin Parnes, University of Michigan

IRIS data products can serve as a vehicle for establishing and strengthening networks and alliances, both with campus stakeholders and with external constituents. Through these networks, the IRIS data can become more useful and contextualized. Developing tactics for leveraging these relationships can be challenging, however. Panelists will discuss examples of creative strategies for engaging with stakeholders around IRIS data products, including those who might not immediately come to mind, along with the barriers that may exist. We aim to address at least some of the following questions:

- How do you develop a shared value proposition with others on campus around IRIS data?
- How can you communicate such propositions effectively with others?
- How can you identify who needs to be involved?

1:30-2:30 **Session 3: Concepts for Future Reports & Products**

IRIS is always seeking to develop new ways to provide value to its member universities. Specialized projects using IRIS data may evolve into specialized products for members that can help universities tell their own stories to their stakeholders. Today's final session will focus on several special projects that pose interesting possibilities.

Federal Advisory Committee Act (FACA) Database Exploration and Record Linkage

Presenter: *Natsuko Nicholls, IRIS*

This presentation addresses the social impact of research, focusing on the way that scientific knowledge is translated into society through researchers' public engagement and service. By using and linking IRIS data on research and grant activities to the Federal Advisory Committee data, it is demonstrated that federally funded research are related to those who are appointed to serve on Federal Advisory Committees assigned by federal agencies on particular issues. The presentation focuses on the case of the University of Michigan.

Impact of CTSA Grants on Translational Research Using IRIS Data

Presenters: *Nancy Calvin-Naylor, IRIS*
Elias Samuels, University of Michigan

The Clinical and Translational Science Award's emphasis on education and training necessitates the tracking of participant outcomes to demonstrate impact. IRIS staff and a University of Michigan CTSA representative will provide an overview of initial attempts to utilize IRIS data to track career outcomes of program participants.

Matching UMETRICS Award Data with Public Datasets: An Example from NYU

Presenters: *Michael Miller, New York University*
Ridhima Sodhi, New York University

At the request of the NYU VP for Research, an NYU team matched their UMETRICS award data with fields of research derived from public abstract information produced by Digital Science Research and compared it to AAU benchmarks. We will show the results of that match, as well as a prototype tool that could be used for both research planning and fundraising by other UMETRICS universities.

2:30-3:00 Wrapping it Up (*Jason Owen-Smith, IRIS*)

- Highlights of the day
- IRIS governance update
- IRIS research data/call for proposals

Thank you for your time, energy, and commitment to IRIS. Safe travels!

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