



INSTITUTE FOR
RESEARCH ON
INNOVATION & SCIENCE

MEMBERSHIP GUIDE

Updated April 2026





Welcome!

Thank you for your interest in joining the Institute for Research on Innovation & Science (IRIS). This guide provides support to help your institution think through common questions and considerations involved in IRIS membership.

Please reach out to us at IRIS-info@umich.edu to set up a meeting or to suggest topics for discussion that have not been covered sufficiently in this guide.

We look forward to hearing from you!

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Details of Membership

ABOUT IRIS

IRIS is a national consortium of research universities creating trusted, independent data to understand, explain, and improve the public value of research. Anchored by an IRB-approved data repository hosted at the University of Michigan's Institute for Social Research, IRIS collects administrative data from its members to produce reports and data products that examine scientific productivity and the return on public and private investments in research. Since 2015, IRIS has been a trusted resource for high-quality data that supports independent, frontier research on science and innovation in the service of the public interest.

BENEFITS OF MEMBERSHIP

IRIS helps institutions like yours work individually and collectively to measure, communicate, and strengthen the economic and social impact of your research enterprise.

- **Custom reports and tools** provide a detailed picture of the social and economic impact of funded research, focusing on industries and vendors, workforce development, and government relations. Members use insights to communicate the impact of research in public communications and in federal and state relations, and to make data-driven decisions about research administration.
- **Free research access to the IRIS UMETRICS dataset** enables faculty and students at your institution to examine de-identified data on more than 580,000 funded awards at more than 100 campuses that represent \$192 billion in sponsored project spending. For more information, visit IRIS's [Research Data](#) webpage.
- **A voice in governance** means members have a seat at the table to build future products and initiatives. We are governed by a Board of Directors elected by member institutions.

CONVENING A TEAM

Because so many different people on campus are involved in the work of becoming an IRIS member institution, including IT representatives who can pull the required data from various offices, we have found it most effective for members to identify a campus champion that can convene the relevant stakeholders for meetings or consultation as needed and who will be responsible for granting permissions to the report portal.

When an institution joins IRIS, we typically ask for several contacts:

- **Main contact:** the ultimate decision-maker on IRIS membership

- **Data contact(s):** the person or people responsible for transmitting data to IRIS
- **Invoice contact:** the person responsible for managing the payments of IRIS invoices
- **Report recipients:** the people at your institution who should have access to the latest reports and receive emails about data updates and communication resources

MEMBERSHIP AGREEMENT

To join IRIS, universities review and return the IRIS Membership Agreement. Members can return a redline copy (if there are proposed changes) or a signed copy (if no changes are needed). IRIS routes the agreement through our internal processes. For more details, please see the IRIS Membership Agreement on our [Membership](#) page.

Questions about the agreement can be sent to:

Dharma Akon
Managing Director
dharmrae@umich.edu

Karen Woollams
Business Manager
woollams@umich.edu

ANNUAL FEE

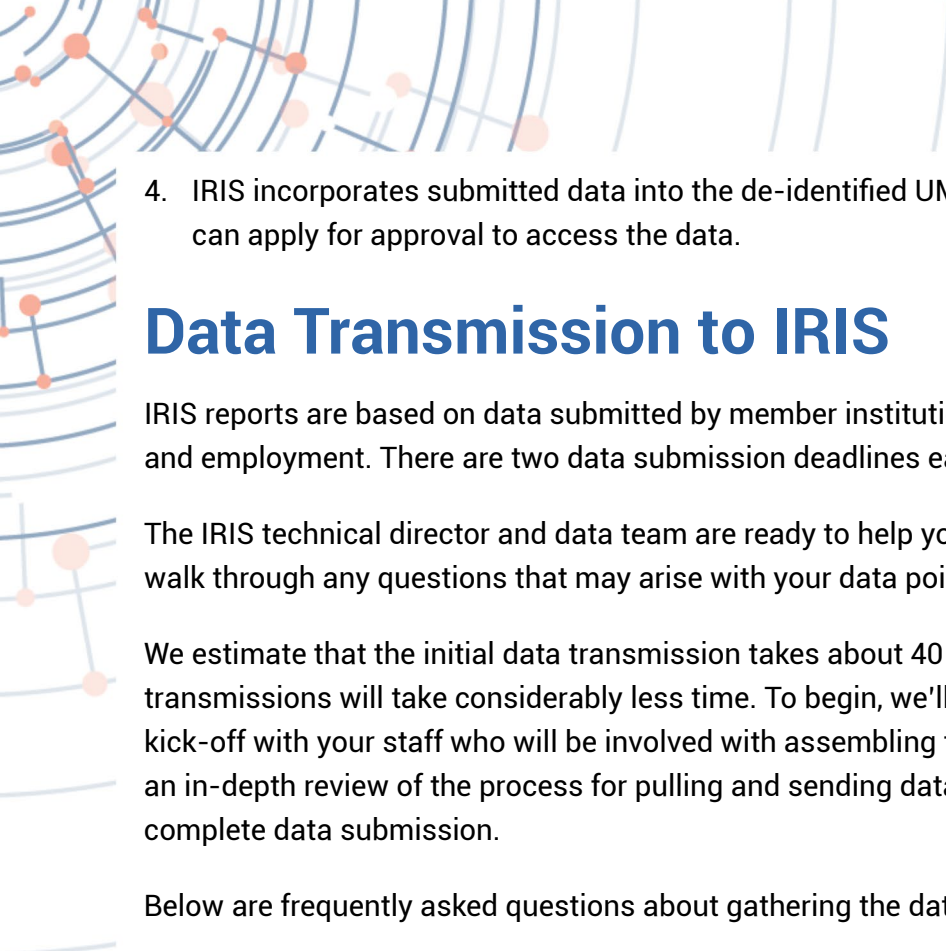
The membership fee for a single institution is \$25,000 per year. University systems that provide a single data stream are counted as one institution. The annual fee covers the infrastructure costs at IRIS, including new data product development, computer software and hardware, and overhead.

DATA SUBMISSION

IRIS members contribute annual submissions of administrative data, which is housed in an IRB-approved data repository hosted at the University of Michigan's Institute for Social Research. IRIS collects the administrative data from our members and transforms them into custom reports and data products, which are used to measure, communicate, and expand their research impact.

How the data-report cycle works:

1. Members submit research-related expenditure, employee, and award data to IRIS annually.
2. IRIS improves the data by cleaning and securely linking them to more than 60 public and restricted data sources.
3. IRIS produces campus-specific reports and tools showing the impact of the research enterprise, which are delivered on an annual schedule.

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4. IRIS incorporates submitted data into the de-identified UMETRICS research dataset. Researchers can apply for approval to access the data.

Data Transmission to IRIS

IRIS reports are based on data submitted by member institutions relating to their research spending and employment. There are two data submission deadlines each year: April 15 and October 15.

The IRIS technical director and data team are ready to help you manage this process effectively and walk through any questions that may arise with your data point of contact.

We estimate that the initial data transmission takes about 40 hours of institutional effort; subsequent transmissions will take considerably less time. To begin, we'll work with you to schedule a technical kick-off with your staff who will be involved with assembling the data submission, where we will have an in-depth review of the process for pulling and sending data, and the files and fields necessary for a complete data submission.

Below are frequently asked questions about gathering the data for submission.

WHAT DATA DO WE NEED?

When a member first joins IRIS, we ask for an initial data submission that covers as much time as possible. Ideally, this initial submission should include the past five fiscal years of data, since this is the default time frame of many standard IRIS reports. After the initial submission, IRIS asks for an annual data submission of the most recently closed fiscal year.

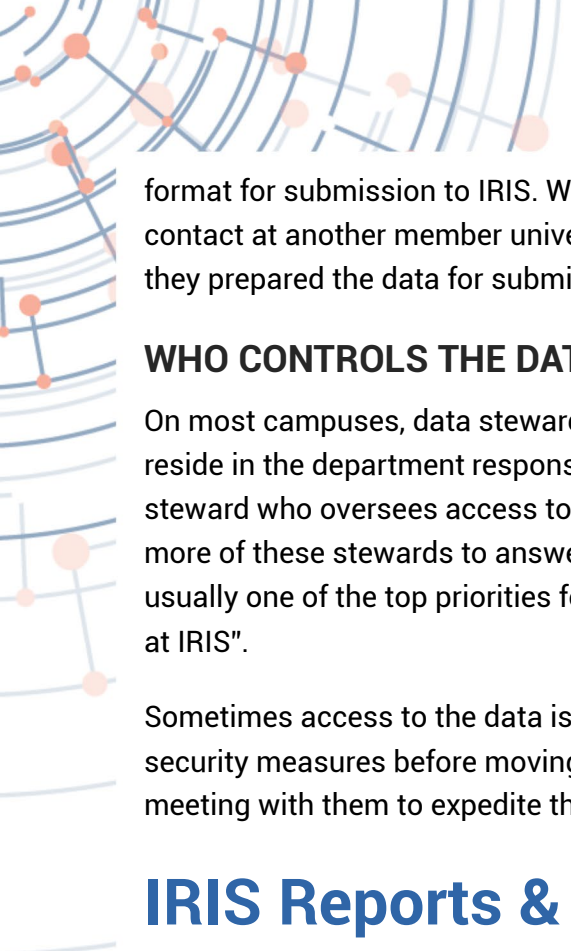
Our website has detailed documentation about the data fields and how to prepare data for submission.

WHERE IS THE DATA LOCATED?

Typically, data needed for IRIS are housed in a few different places on your campus:

- Research-related **expenditure data** are often found in the procurement and payment systems
- Research-funded **employee data** are usually in the HR system
- Research **award data** can usually be found in the sponsored projects system

These different systems can reside on one or more enterprise systems. We have worked with many universities that use different data management systems, including SAP, PeopleSoft, Ellucian Banner, Maestro, and others. Some of our existing members use these ERP systems as well as data warehouse systems to manage their data. Business or Data Analysts can normally pull data from these systems using SQL queries, Tableau or Cognos reports, and put them together in the requested



format for submission to IRIS. We also provide targeted support by teaming a new university with a contact at another member university with a similar ERP system. These mentors can help explain how they prepared the data for submission, troubleshoot issues, and share relevant code.

WHO CONTROLS THE DATA?

On most campuses, data stewards control access to the data they manage. These stewards usually reside in the department responsible for the data. For example, human resources will have a data steward who oversees access to employee data. We recommend scheduling a meeting with one or more of these stewards to answer their questions and provide information on data security, which is usually one of the top priorities for them. For more details, see the section below titled "Data security at IRIS".

Sometimes access to the data is managed by a central IT unit. They may want to review the IRIS data security measures before moving forward with access to the data. We are happy to schedule a meeting with them to expedite this process.

IRIS Reports & Products

IRIS produces reports that synthesize, summarize, and visualize the direct social and economic impact of your university's research spending. You can also easily access the improved data that underlie these reports for more in-depth analysis. Visit our website for [examples of IRIS reports](#).

Spending Report

This report provides details on employment patterns and expenditures on research awards on your campuses, including total spending with vendors by county and congressional district, and the number of unique employees paid on research awards by occupation category and funding agency. This report also allows you to benchmark your data against a custom peer group of three or more IRIS universities.

Vendor Profile Report

This report summarizes total spending and the number of establishments supported nationally, in-state, and among small businesses over time, and shows how the percentages of spending totals and vendor types compare with all other IRIS universities. It also identifies the industries where research-related spending has the greatest economic impact and the impact on in-state and small businesses within each sector.



Employee Profile Report

This report characterizes the career pathways of employees funded by sponsored research projects – including faculty, postdocs, staff, and students – after they leave your institution. It identifies the top states and counties where former research employees are located, the institutions where they found work, and their earnings by industry sector.

Impact Finder

This tool is an interactive map that shows where your university purchased research-related goods and services, including vendor names, locations, and award details. The search feature and filters allow you to narrow spending by year, funding agency, county or congressional district where spending occurred, and keywords from the vendor profile and award abstract.

Congressional District Detail Report

This report details federally funded research-related spending for any congressional district in the country and includes insights on the total spending, number of vendors supported, and top industries and vendors

Accessing and sharing reports

IRIS will email your designated report recipients when new or updated reports are available. All interactive reports are available via the IRIS Member Portal, and institutions can add as many users or report recipients as they would like. Reports can be shared via a web link or a downloadable PDF, and the underlying data for each report is available for download.

With each report, we provide a press release template meant to help you disseminate the information to relevant audiences. Our team is available to give a detailed walkthrough of your reports and the benefits of IRIS membership with your team, as needed.

Congressional District Fact Sheet

This report provides an overview of federally funded research-related spending in each congressional district in your home state for the last fiscal year, as well as the past five fiscal years combined. It also includes additional insights about university employment on federally funded awards and the career outcomes of research-funded employees.

State Legislative Fact Sheet

This report shows research spending on all funded awards, broken down by state legislative district for the last fiscal year, as well as the past five fiscal years combined. It also includes impact summaries about the research workforce.

Aggregate Reports

“All IRIS” reports aggregate data from all IRIS members to highlight patterns in research spending, workforce development, and economic impact across the national research ecosystem. IRIS can also create custom aggregations with a select group of three or more institutions.



Use Cases

IRIS reports are a valuable resource for many different stakeholders on your campus and for a variety of internal and external goals. Some common use cases among university departments include:

Government Relations

- Demonstrating the impacts of university-based research on the communities, businesses, and employment in any district in your state.

Economic and Community Development

- Highlighting industries and vendors in your state that benefit from research-related contracts.

Research and Innovation

- Showcasing the annual direct impact of research expenditures on and off campus to boards of regents, institutional partners, etc.
- Generating analytic decision-making tools for research management.
- Understanding the movement of faculty, staff, and students supported by research funds and the networks they form.

Public Relations

- Creating strategic content that connects the dots between research expenditures and real-world impact stories.
- Growing public understanding of the resources needed to conduct research and the related economic and social benefits.

Institutional Development

- Gathering insights for executive-level briefs, speeches, press appearances, and conferences.
- Developing communications for donor relations, student recruitment, program admissions, and alumni outreach.
- Benchmarking institutional growth and development.



The IRIS UMETRICS Dataset

One of the main benefits of IRIS membership is free access to the IRIS UMETRICS dataset for anyone at your institution.

The dataset is produced every few years with the improved, de-identified data submitted by all IRIS members. The 2024 release contains data on approximately 580,000 funded research awards. \$192 billion in award spending, wages to about 985,000 employees, and payments to more than 1.2 million vendors.

Researchers in economics, sociology, complex systems, industrial and operations engineering, and many other domains have found the dataset to be useful in producing dozens of published, peer-reviewed papers and books.

Some of the research topics investigated using the data include:

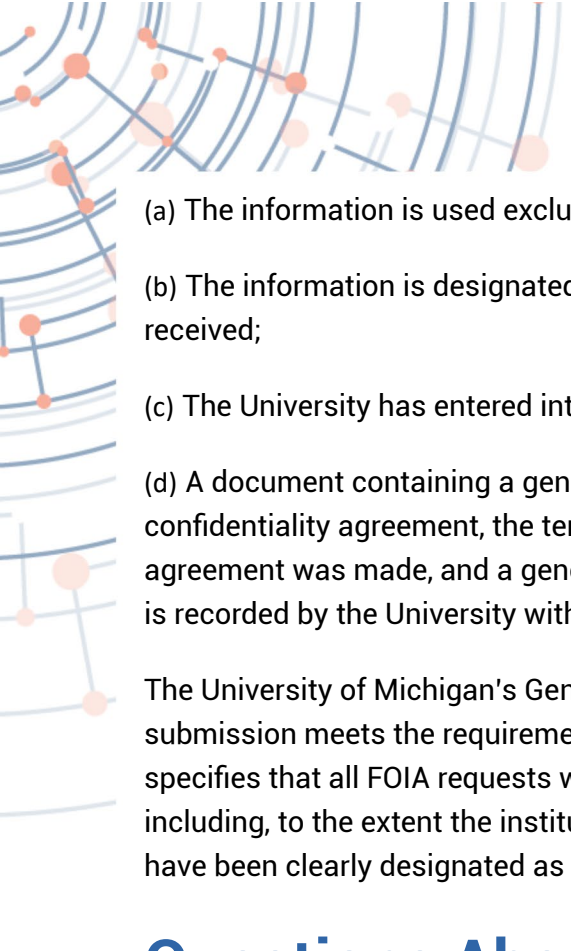
- Exploring the relationship between research outputs (patents, publications, startups established) and funding sources, specifically the differences in private sector funding of academic research
- The role of collaboration networks in science productivity
- The degree to which team structure and ethnic diversity influence scientific productivity
- Economic outcomes for people who conduct interdisciplinary research in STEM

The data are accessed through our Virtual Data Enclave (VDE), which is available from any computer on your campus. An overview of the [data access application process](#) is available online. The data are also available for non-research uses such as program evaluation.

Access to the IRIS dataset is also available to those with Census Bureau Special Sworn Status through the [Federal Statistical Research Data Center](#) system (FSRDC).

Questions About FOIA

Private institutions often have concerns about the Freedom of Information Act (FOIA). In 1994, the State of Michigan passed the Confidential Research and Investment Information Act (CRIIA) to protect confidential research, intellectual property, and trade secret records maintained by any public university or college in Michigan. Under CRIIA, data provided to a public university in Michigan by a private external source may be withheld from disclosure if all the following conditions are met:

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- (a) The information is used exclusively for research, testing, evaluation, and related activities;
 - (b) The information is designated as confidential by the external source before or at the time it is received;
 - (c) The University has entered into an authorized agreement to keep the information confidential; and
 - (d) A document containing a general description of the information to be received under the confidentiality agreement, the term of the agreement, the name of the external entity with whom the agreement was made, and a general description of the nature of the intended use for the information is recorded by the University within 20 regular working days after it is received.

The University of Michigan's General Counsel and FOIA Office have determined that your data submission meets the requirements for an exception to FOIA requests under CRIIA. Our Agreement specifies that all FOIA requests will be reviewed according to any applicable FOIA exceptions, including, to the extent the institution depositing data with IRIS is a private entity and the materials have been clearly designated as confidential, CRIIA.

Questions About FERPA

Universities often ask us about the Family Education Rights and Privacy Act (FERPA). We leave the determination of whether your data are protected by FERPA up to you and your Office of General Counsel. If you decide your data are protected by FERPA, IRIS will protect them as outlined in the Member Agreement, consistent with FERPA requirements under the study exception.

Protection of Data Privacy & Confidentiality

IRIS is committed to the responsible use of restricted data. We do not share identifiable data with anyone other than IRIS Partners and Nodes (see IRIS Member Agreement for more details). We follow strict privacy protection and confidentiality principles with all our data partners and nodes. All data transmitted to partners and nodes are encrypted at the file level, and personally identifiable information is destroyed after the matching process is complete.

We work with our members, nodes, and partners to produce detailed, high-value reports while carefully protecting privacy and confidentiality. IRIS reports do not include any identifiable information on individuals. When match rates are low or report categories are too narrow, some data points may not be reported.



Data Security at IRIS

IRIS has a robust data management and security plan. The IRIS data infrastructure is managed centrally from within the Institute for Social Research (ISR) at the University of Michigan. ISR is the world's largest academic social science survey and research organization. Established in 1949, ISR has a long history of gathering, managing, disseminating, and protecting valuable research data, including personally identifiable information.

The safeguarding and protection of data are based on a defense-in-depth architecture. Firewalls, secure remote application access platforms, and other boundary controls are implemented based on a risk-based approach that adheres to a Least Privilege access control model. Specific configuration controls are safeguarded on a strict "need-to-know" basis.

The IRIS client-server environment is protected from intrusions, malicious software, denial-of-service attacks, and insider misuse using a combination of administrative, physical, and technical controls. Access to server resources once inside the network is based on a role-based directory service architecture. Host-level security includes antivirus and malware protection software that is centrally managed to allow for rapid incident response. Access to all data storage and management systems is restricted to only four personnel.

All IRIS enterprise servers are located in separate, secured rooms with access limited to authorized administration staff. Server rooms are locked at all times, with access restricted to only IT personnel utilizing electronic proximity access badges to gain entry. Licensed restricted-use dataset access is tightly controlled in accordance with security requirements. Access to the general systems is limited to IRIS employees. Visitors are accompanied by IRIS staff throughout their visit and are not allowed access to the internal network.

In order to be a responsible trustee of contributed university data, the data are stored and accessed in a manner consistent with stakeholder concerns and follow evolving data management practices in the United States and within Data Management Association (DAMA International) standards, as well as relevant government regulations and laws (for example, FERPA).

A core aspect of IRIS is making de-identified data available for research purposes. There is a balance between protecting the privacy of stakeholders while also granting access to this information, all while abiding by legal guidelines.

THE FOUR A's

We use the four A's to meet these requirements: Authenticate the user's source, understand what they're Authorized to do, manage user Access, and Audit their activities.



Authorization

In allowing access for researchers, IRIS weighs the merits of each research project and determines whether there is a valid need for access to the data. Each researcher has an approved area of focus, and their permissions reflect defined, appropriate views of the data.

Access

Access to the full data repository is restricted to the participating Node institutions, the Census Bureau, IRIS Technical Director, and ISR Data Security personnel. Access to the de-identified data set is restricted to qualified research individuals who have been vetted and approved through the IRIS research data use application process. All individuals are required to sign affidavits of non-disclosure before gaining access to the data. User access is revoked upon termination of employment or at the end of the approved research timeframe.

Access is monitored to compile data about who is accessing information for compliance auditing and to detect unusual or suspicious behavior. Confidential information is monitored more strictly. The data are secured on site within the IRIS enclave at the ISR facility on the University of Michigan campus.

Authentication

Each member is effectively verified as being who they say they are.

Audit

Auditors must be independent of the data and/or the process involved. In addition to any external auditors required, we provide internal auditing to keep quality standards high. Responsibilities include reporting on the "State of Data Security," by verifying that activities are in compliance with regulations, and comparing our procedures against best practices. Auditing is not a substitute for data security management; rather, it is a support process that occurs regularly.

DESTRUCTION OF DATA POST-PROJECT

Upon the date of expiration or termination of this Agreement, the parties mutually agree that Michigan shall, at Michigan's expense, remove any identifying elements from the Materials in Michigan's possession (the "De-identified Materials").

Michigan agrees to send a statement certifying the de-identification of the Materials to the Depositor within 30 days of their de-identification. Michigan agrees that no data from the Materials, or any parts thereof, except in the form of the De-identified Materials, shall be retained unless written authorization from Depositor for the retention of such files has been received and confirmed.

Let us know if you still have questions about data security. We're happy to share the IRIS Data Management Plan, the IRIS Business Continuity Plan, and the IRIS Incident Response Plan.

Governance & Member Participation

IRIS is governed by a [Board of Directors](#) elected by member institutions. The board oversees the management of the affairs, business, and activities of IRIS, and establishes policies and directives governing the business and programs of IRIS. Board members are elected by a voting representative from each IRIS member institution and serve three-year terms that may be renewed once (for a total of six years). Board members' terms will be staggered every year to allow for approximately one-third open positions each year.

If anyone at your institution is interested in serving on these boards or committees, please contact iris-info@umich.edu.

IRIS BOARD OF DIRECTORS

Bethan Cantwell

Assistant Provost for Institutional Research, Michigan State University, Term: June 1, 2024-June 30, 2027

Marcela Gomez

Director of Research Analytics, Office of the Senior Vice Chancellor for Research, University of Pittsburgh, Term: July 1, 2025-June 30, 2028

Adriana Kuiper

Associate Vice President and Chief Operating Officer for Knowledge Enterprise, Arizona State University, Term: July 1, 2025-June 30, 2028

Julie Lumeng

Associate Vice President for Clinical and Human Subject Research, University of Michigan, Term: Ongoing (U-M seat)

José Román

Vice President, Research Administration, Rutgers University, Term: June 1, 2023-June 30, 2026

Aimee Roundtree

Assistant Vice President for Research, Division of Research, Texas State University, Term: July 1, 2025-June 30, 2028

Michael Zwick

Senior Vice President for Research, Rutgers University, Term: July 1, 2024-June 30, 2027



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*View a complete list of [IRIS staff](#) on our
website.*